

Inclusive Excellence@UVA

Toolkit for Strategic Planning Administrative & Operational Units



Division for Diversity, Equity, &
Inclusion

We Acknowledge

We acknowledge that the land we live, learn, and work on is the traditional territory of the Monacan Indian Nation. We pay respect to their elders – past, present, and emerging. We also pay respect to the Pamunkey Indian Tribe, the Chickahominy, the Eastern Chickahominy, the Upper Mattaponi, the Rappahannock, and the Nansemond who have an enduring relationship with and call our surrounding area home today. In addition, we acknowledge and pay respect to the enslaved people who built and labored at the University of Virginia.

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Introduction

If you are not sure where to start in creating an inclusive excellence (IE) plan, this is a guide to kickstart your thinking.

There is no one “right” or “best” way to create an IE plan. This toolkit is simply that, a tool to help you get started should you need it. The IE framework is flexible not prescriptive, and the IE planning process should work in support of core and ongoing activities.

The UVA Division for Diversity, Equity, and Inclusion is not prescribing a set process, a set number of goals, or even suggesting that a plan cover all dimensions of the IE framework. IE plans are meant to be strategic. IE planning work should support the mission and scope of your area and specifically relate to how your area is working in concrete ways toward the strategic vision of the University.

Self-assessment is critical to any planning process and is the focus of planning in the IE framework. On the basis of your self-assessment, your area could identify areas of affirmation and opportunity in all, some, or one of the dimensions. The key is that whatever is made a priority for the area will be reflective of a clear purpose, be intentional, and represent a meaningful opportunity to make a real, sustainable, and positive change in terms of equity and inclusion in your area.

Key Principles

Each VP/Dean will have a preference and decide the level of the organization at which strategic plans using the IE framework are designed. Some may choose the entire VP Area or School, while others will use the department or a unique collection of areas joined by function. At whatever level it is organized, a strategic plan utilizing the IE framework at its best will be:

- **Mission-driven** – Reflective of the mission and scope of the school/area and tied to best practices that fully leverage difference to fuel excellence.
- **Equity-focused** - Understanding that the organization has the agency and the responsibility of positively working toward equitable outcomes. This requires reviewing data and outcomes disaggregated by characteristics such as race, ethnicity, gender, and others where available.
- **High-impact** – Tailored to those key priorities and actions that will drive equitable and meaningful change. The IE plan should not include all potential or ongoing work, but should be reflective of key strategies and measures that have transformative potential.
- **Transparent** – IE plans should describe the assessment and analysis that identified the key priorities and actions and be shared publicly.
- **Measurable** – Evidence should drive not only the establishment of the IE plan but also the process for holding the organization accountable for enacting the plan and provide the basis for understanding if the intended goals are being achieved.
- **Co-created** – Meaningfully reflecting the input of multiple constituencies and groups within the school/area.

Inclusive Excellence Planning Process

Steps in the Process

1. Create an IE team for collaborative design
2. Engage in self-study and review the UVA strategic Plan
3. Determine priority commitments
4. Develop a co-created IE action and accountability plan
5. Submit a “final draft” plan for review
6. Review plan feedback and finalize plan

Key Planning Tools

- Building the IE team
- E&I Data guides
- Engagement ideas
- Goal development guide
- IE plan template
- IE example goals, actions, & measures

Inclusive Excellence Definitions

Diversity

The full spectrum of human attributes, perspectives, identities, backgrounds, and disciplines.

Fair treatment, equal access, and attending to socio-historical structures and lived context to promote justice.

Equity

Inclusion

An active, intentional, ongoing process to build community well-being and belonging.

Taking notice of inequities, their contexts, and the institution's agency and responsibility in critically reassessing its own practices.

Equity-Minded

Anchor Mission

A commitment to intentionally apply an institution's place-based economic power and human capital in partnership with community.

IE Framework Dimensions

The IE framework is a comprehensive but flexible structure for engaged, intentional, and systemic self-study across all areas of organizational functioning as described below.



Access
+
Success

This dimension refers to the compositional diversity among the organization's constituent groups (staff, faculty, students, visitors, patients, alumni, customers, community partners, etc.) and their context-specific outcomes or benefits gained from their relationships with the organization. Processes like recruitment, retention, development, and long-term outcomes (graduation, tenure, career advancement, etc.) are the key focus of this dimension.



Climate
+
Intergroup
Relations

This dimension refers to what it feels like for individuals to be here and the behavioral experiences and norms that are present. Effective and innovative cultures depend on individuals feeling comfortable to take interpersonal risks and to bring their whole selves to their work and learning. Measuring constituent perceptions related to feeling respected, belonging, and prevalence of affirming relationships with peers and organizational administration are among the concepts present in this dimension.



Education
+
Scholarship

This dimension relates to the ways in which curriculum, teaching, research, scholarship, and employee and student development contribute to our passion for discovery, innovation, community engagement, service, and social justice. Programs and processes in this dimension include intentionally designed curricula and pedagogies, as well as targeted professional development activities, that promote intercultural awareness and competence.



Infrastructure
+
Investment

This dimension refers to the policies, resources, organizational and communication structures, and performance measures that inform and enable an intentionally inclusive, equitable, and innovative organization.



Community
+
Partnership

This dimension refers to how place-based organizations like ours engage reciprocally and in a participatory way with our surrounding neighborhoods, counties, and the Commonwealth. Specifically, how we as an organization understand and track our impacts in terms of the financial and social-well being of the communities and partners with which we are engaged.

IE Planning Team Guide

Building the IE Planning Team

The first step in the strategic planning process that should be considered is assembling a team of individuals who will lead the effort. For many, participation in the planning process will likely be fluid, with participants coming in and out of the process as their input or expertise is needed. It is however recommended that a core IE planning team that is representative of constituencies in your area and includes individuals with positional and social authority in the school/area/department, be convened to support a co-created plan.

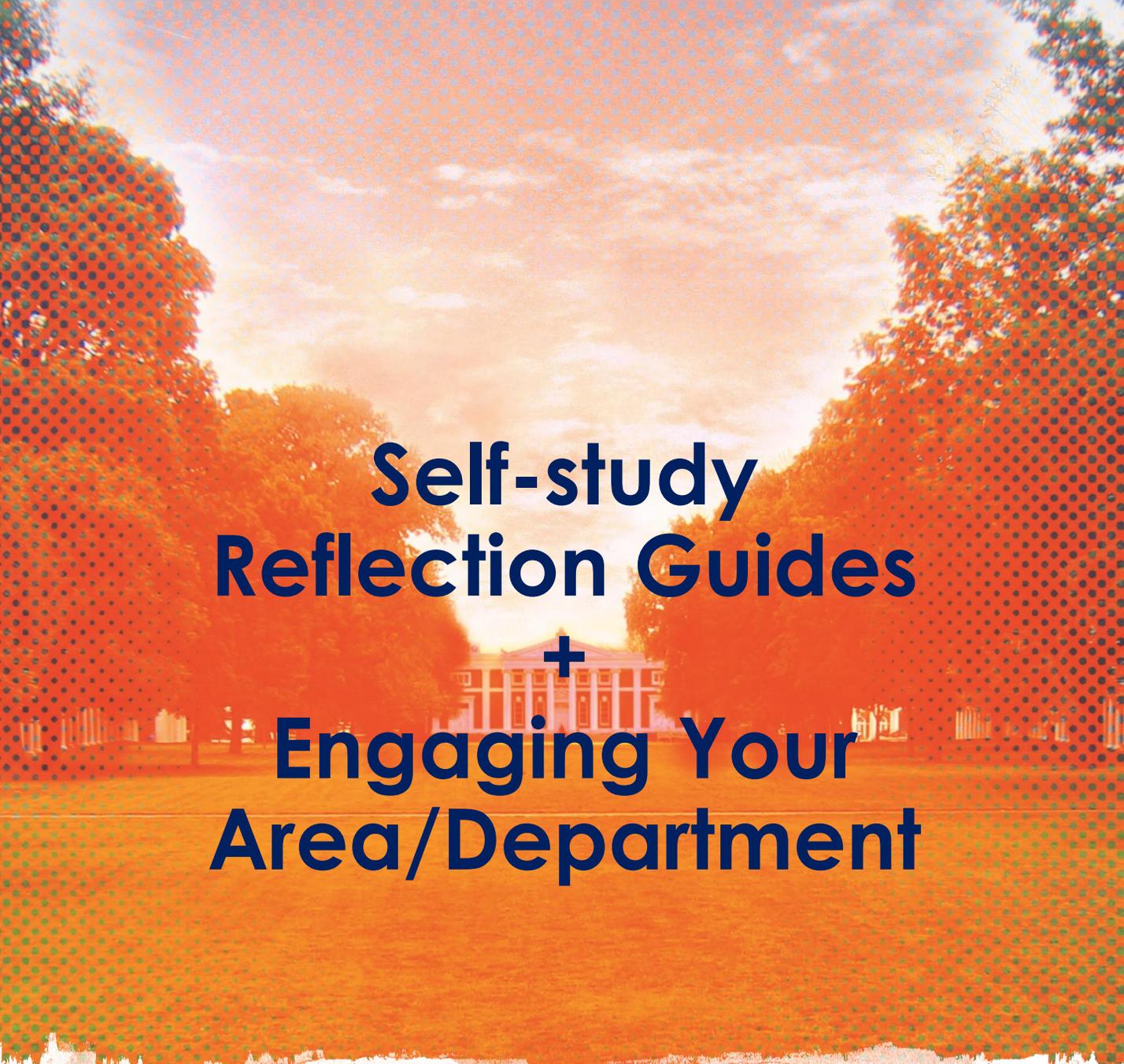
Functions of the IE Planning Team

- Planning process design – The IE team can advise the leadership on the scope, structure, and timeline of the inclusive excellence process.
- Planning process engagement – The IE team may help chairs and managers coordinate meetings and communications, producing materials and other relevant items.
- Inquiry and Change Analysis – The IE team will receive and may seek qualitative and quantitative data to engage in critical reflections on a broad range of processes, practices, programs, and outcomes. The benefit of a team is the capacity to synthesize the information gathered to identify points of affirmation and points of opportunity to measurably contribute to achieving inclusive excellence.
- Strategic Equity and Inclusion Planning – The IE team will facilitate data-driven discussion to develop the content for the IE plan (outcomes, actions, and performance measures).
- Communications – The IE team can serve to communicate with leadership, staff, faculty, students, and community members about the purpose of the process, updates on the process, for information gathering, and for reporting results of the process.

Selecting IE Planning Team Members

There are different ways to create a core IE planning team. Leaders in the area can appoint a team, nominations from managers could be sought, or a call for applications across the area could be used. There are advantages and important considerations for all these approaches and no one best way. Some considerations for building the core IE planning team include:

- Authority – The team will need to ask staff in different areas, programs, and departments to provide information and potentially take some actions. To achieve this, the team may include upper management and/or the executive can provide explicit and clear authorization.
- Knowledge and Skills – Collectively, IE team members will need to have expert knowledge of the area and how it operates. Some familiarity with equity and inclusion practices and evidence of [intercultural competence](#) will be helpful.
- Time – The IE planning team will need dedicated time for the planning effort. The level of time commitment will vary based on the size of the area and the scale and depth of the process, but it must be a consideration.
- Representative – The size of the IE planning team will vary but should be broadly representative of the constituency groups that will be the subject of strategic equity and inclusion actions and measures.



Self-study Reflection Guides + Engaging Your Area/Department

Section Description:

- The following data reflection and policy equity guides may help you in steps 2 – “Self-study” and 3 – “Determining priorities”.
- Ideas for engaging groups in your area/department may help you in step 4 – “Co-creating action and accountability plans”
- The data reflection and policy equity guides can be used as discussion questions in a group setting or as written reflection questions for an individual, or the IE planning team.
- Some centralized data will be provided by the Division for Diversity, Equity, and Inclusion as the planning process progresses, but in many instances your area will need to supplement with data you are already collecting and analyzing, and/or have access to as part of your self-study.

Equity & Inclusion Data Guide

Purpose of Tool

This tool is designed to support the IE planning team, and the communities of practice or local subject matter experts as they meet with stakeholders and employees to review information related to access and success. The Division for Diversity, Equity, and Inclusion will provide some initial data as one potential input in the foundational self-study engaged for strategic planning, which should be supplemented with area/department data.

Access + Success

Data to review

- Composition of workforce disaggregated by key characteristics
- Compositional trends for the workforce disaggregated by key characteristics
- Applications and hiring trends (faculty and/or staff) disaggregated by key characteristics
- Career advancement trends (promotions, supplement with professional development trends from own area) disaggregated by key characteristics
- Workforce retention rates disaggregated by key characteristics

Reflection Questions

1. What are your initial impressions as you look at the disaggregated compositional snapshot?
2. What organizational process and procedures are related to the resultant composition found? What resources in terms of money, personnel, time, or other infrastructure are related and within our span of direct action?
3. How does the compositional and trend data compare to the populations we serve as part of our mission? How do they compare to relevant peers or the discipline/professional field?
4. What types of support are we providing to individuals? At what points in our process?
5. Are there other sources of evidence that relate to these numbers that we should be considering?
6. What are our hopes for the future in terms of access and success for each constituency within our workforce and those we serve?
7. Are there areas related to our hopes that it seems we are already doing well? Do we know why?
8. For those areas with an opportunity for strategic change, what is the change we need to see in order to realize our hopes?

Equity & Inclusion Data Guide

Purpose of Tool

This tool is designed to support the IE planning team, and the communities of practice or local subject matter experts as they meet with stakeholders and employees to review information related to climate and intergroup relations. The Division for Diversity, Equity, and Inclusion will provide some initial data as one potential input in the foundational self-study engaged for strategic planning, which should be supplemented with area/department data.

Climate + Intergroup Relations

Data to review

- Workforce sense of belonging (overall and by area) by characteristics
- Workforce perceptions of respect (overall and by area) by characteristics
- Workforce perceptions of mentorship (overall and by area) by characteristics
- Workforce perceptions of trust/empowerment (overall and by area) by characteristics
- Overall satisfaction, as measured by departure considerations (overall and by area) by characteristics

Reflection Questions

1. What are your initial impressions as you look at the disaggregated cultural climate results?
2. Are there any group identifications where there are noticeable differences in perceptions and experiences? Are there any other groups for which you would like to see data based on past research or experiences?
3. Considering each theme area, are there any particular strengths or challenges indicated by the data?
4. What organizational processes and procedures are related to the climate themes identified? What resources in terms of money, personnel, time, or other infrastructure are related and within our span of direct action?
5. What types of support are we providing to individuals or groups? At what points in our processes? Which positions provide this support?
6. What are your hopes for the future in terms of climate and intergroup relations for each constituency?
7. How will improving perceptions in these themes be a benefit to the workplace?
8. What is the change we need to see in order to realize our hopes?

Equity & Inclusion Data Guide

Purpose of Tool

This tool is designed to support the IE planning team, and the communities of practice or local subject matter experts as they meet with stakeholders and employees to review information related to community and partnership. The Division for Diversity, Equity, and Inclusion will provide some initial data as one potential input in the foundational self-study engaged for strategic planning, which should be supplemented with area/department data.

Community + Partnership

Data to review

- Workforce composition by zip code
- Local spending/procurement
- Small/Woman-/Minority-/Veteran-/Disability- Owned business spending/procurement
- UVA Community working group survey results
- Public event(s) review
- Local well-being measures
(<https://public.tableau.com/profile/thomas.jefferson.health.district#!/>)

Reflection Questions

1. What are your initial impressions as you look at the results of your analysis of community and partnership data?
2. Are there any particular strengths or challenges indicated by the data?
3. What organizational process and procedures are related to the data reviewed? What resources in terms of money, personnel, time, or other infrastructure are related and within our span of direct action?
4. Are we able to track all of the activity we engage in? If not, what are the important things we may need to track moving forward?
5. What do we know about the community in which we live? How have we previously engaged with community partners or community based organizations?
6. What are your hopes for the future in terms of community and partnership?
7. What is the change we need to see in order to realize our hopes?

Equity & Inclusion Data Guide

Purpose of Tool

This tool is designed to support the IE planning team, and the communities of practice or local subject matter experts they meet with stakeholders and employees related to education and scholarship. These data and processes are only limitedly supported by data available at the institutional level and school/department/program level analysis will be needed.

Education + Scholarship

Data to review

- Training and development histories for the workforce
- Topics of past training and development opportunities or retreats
- Conference participation and professional presentations/models our workforce has given
- Inventory of committees and community of practice meetings within the school/department/program and topics that relate to equity and inclusion
- Review of development opportunities supporting collaboration, communication, and inclusion

Reflection Questions

1. What are your initial impressions as you look at the collection of information on the educational/training that is supporting the capacity of the workforce to be more inclusive?
2. What are your initial impressions as you look at the prior topics covered in trainings, retreats, and other development opportunities?
3. Considering the inventory of workplace committees and communities of practice, are there any particular strengths or areas of opportunity related to advancing equity and inclusion in the profession/service delivery?
4. What organizational processes and procedures are related to the areas of education and scholarship in the area/unit/department? What resources in terms of money, personnel, time, or other infrastructure are related and within our span of direct action?
5. What types of support are we providing to individuals or groups? At what points in our processes? Which positions provide this support?
6. What are your hopes for the future in terms of education and scholarship which contributes to inclusive excellence?
7. What is the change we need to see in order to realize our hopes?

Policy Equity Guide

Purpose of Tool

This guide is intended to aid you in examining your area's written and unwritten policies with an equity lens. The reflection questions can be used to guide a team discussion or individual written reflection.

STEP 1. IDENTIFY WRITTEN AND UNWRITTEN POLICIES/PRACTICES

What policies/practices are in place in our area/unit?

- *What formal written policies govern how our area/unit is organized, operated and distributes resources and opportunities? (e.g. employee tuition support)*
- *What unwritten/informal decision-making processes and practices determine how we organize, operate, and distribute resources and opportunities?*

STEP 2. INDIVIDUALLY EXAMINE FORMAL AND INFORMAL POLICIES/PRACTICES

1. Foundations of the policy/practice:

- *What is the intent behind the policy/practice? What are the desired outcomes?*
- *Who is responsible for policy/practice implementation and oversight?*
- *How is the policy/practice communicated to policy decision makers and individuals impacted by it?*

2. Equity in language:

- *Does the policy/practice make normative/stereotypical assumptions?*
- *What types of words are used to describe individuals/groups identified in the policy/practice? Is there language that includes or excludes communities that have been historically minoritized? (Ex. "She/He" > "They")*

Policy Equity Guide

3. Data Collection and Reporting

- Who does the policy/practice impact? Who benefits and who does not?
- How is accountability measured? What data are collected to monitor policy/practice implementation and impact?
- Are data disaggregated in collection and reporting? What groups are disaggregated?
- Are there individuals and/or communities that are disproportionately affected by this policy?

4. Accountability for Equity

- At what points in the policy/practice are there points of individual discretion? Are those points structured (e.g., there is an evaluation rubric or guide posts for the decision)?
- Does this policy/practice have potential to perpetuate or help dismantle historical, or other barriers? How?

STEP 3. ADDRESSING INEQUITIES & PROMOTING INCLUSIVE EXCELLENCE

If the policy perpetuates unnecessary barriers or inequities, how can they be mitigated or eliminated?

- What actions will we take to redress the inequities in our formal and informal policies/practices?
- *What actions or changes would actively support equity and inclusive excellence?*

Engaging Your School/Area

Purpose of Tool

The following are ideas to consider in planning how you will meaningfully include the input of all voices in your area. You can engage one, all, or other ideas you have for engaging your community in the planning process. The goal is co-creation.

Focus Groups/Town Halls

Benefits

- Engages a lot of people at once and can publicize participation in the process
- Develop a deep understanding from multiple perspectives through dialogue
- Can generate a lot of ideas at once

Things to Consider

- Requires space and meeting logistics and time to analyze responses
- May require facilitators for small group work or note takers
- Not everyone will be able to attend or will equally participate

Departmental/Affinity Group/Committee Meetings

Benefits

- Many meetings will already be scheduled
- Some committees may reflect the key decision-makers for an IE dimension
- Engage distinct communities on a broad range of issues (ie LGBTQ network)
- Can signal IE as a priority by making it a topic of sustained discussion

Things to Consider

- The timeframe for getting to each area may be long based on pre-scheduled meetings
- A plan for which topics will be covered by group will likely be necessary
- Not everyone will be able to attend or equally participate
- Notetakers will likely be needed to summarize the discussion

Electronic Surveys

Benefits

- Can structure the format of information gathered
- Anyone with a link can participate
- Multiple topics can be covered at one time
- Provides automatic record of the data received

Things to Consider

- Requires time to review responses and comments
- Does not allow for dialogue to explore meaning and context of statements
- If anonymous, it may be hard to ensure all voices are heard or to prevent non-community members from responding

Publish Plan Publicly for Comments

Benefits

- Gives community opportunity to respond to ideas generated by IE team or subject matter experts
- Can articulate a full vision at one time so ideas are not considered in isolation

Things to Consider

- Community less involved in idea generation
- If plan is open to change based on feedback, need to communicate plan's draft status
- Requires plan to collect, organize, and respond to feedback and decide what to incorporate

Inclusive Excellence Plan Template

Section Description:

- The following template is the preferred format for the IE plan for your area.
- Utilizing a consistent format for all areas will help UVA to communicate its collective plans publicly, and to show clear alignment of all actions and measures to the IE framework and the University's strategic plan.
- There is no set length that is expected for the narrative sections.
- Areas/Units may have goals in all, some, or one of the dimensions on the basis of the self-study and priority setting process. There are no set expectations for the number of goals your plan should include but should be reflective of what will actually be done and measured.

IE Plan Template

Introduction

What to include in this section:

- A brief overview of the IE plan in relation to the area's mission and vision.
- A short description of the process used to develop the strategic IE plan.

Self-Assessment

What to include in this section:

- A set of reflections on the area's/department's current strengths, challenges, opportunities, and needs in relation to equity, inclusion, and diversity issues.
- Lessons learned from the study you engaged that have influenced your strategic IE planning process.
- Key findings for each of the IE framework dimensions that were engaged in the study.

Goals, Actions, Measures, and Implementation Plan

We recommend an IE plan for a 3-5 year period. Below is the preferred IE plan template:

Access + Success

2030 Vision: *Recruit and support exceptionally talented, diverse, and service-oriented students. Recruit, support, and retain excellent and diverse faculty and staff.*

Goals/Objectives	Actions	Outcomes (Data/Metric)	Timeframe(s)	Responsible Office/Position	Funding/Resource Allocation
Goal 1					
Goal 2					

Climate + Intergroup Relations

2030 Vision: *Continuously promote and strengthen an inclusive community of trust, a culture of integrity, mutual respect, excellence, collaboration, and innovation.*

Goals/Objectives	Actions	Outcomes (Data/Metric)	Timeframe(s)	Responsible Office/Position	Funding/Resource Allocation
Goal 1					
Goal 2					

IE Plan Template

Education + Scholarship

2030 Vision: *Enable faculty, staff, and students to work across traditional boundaries and prepare servant-leaders to shed new light on enduring and profound questions in our diverse community and globally connected world.*

Goals/Objectives	Actions	Outcomes (Data/Metric)	Timeframe(s)	Responsible Office/Position	Funding/Resource Allocation
Goal 1					
Goal 2					

Infrastructure + Investment

2030 Vision: *Be a community that consistently lives its values and ensure that our systems enable our students, faculty, and staff to do their best work.*

Goals/Objectives	Actions	Outcomes (Data/Metric)	Timeframe(s)	Responsible Office/Position	Funding/Resource Allocation
Goal 1					
Goal 2					

Community + Partnership

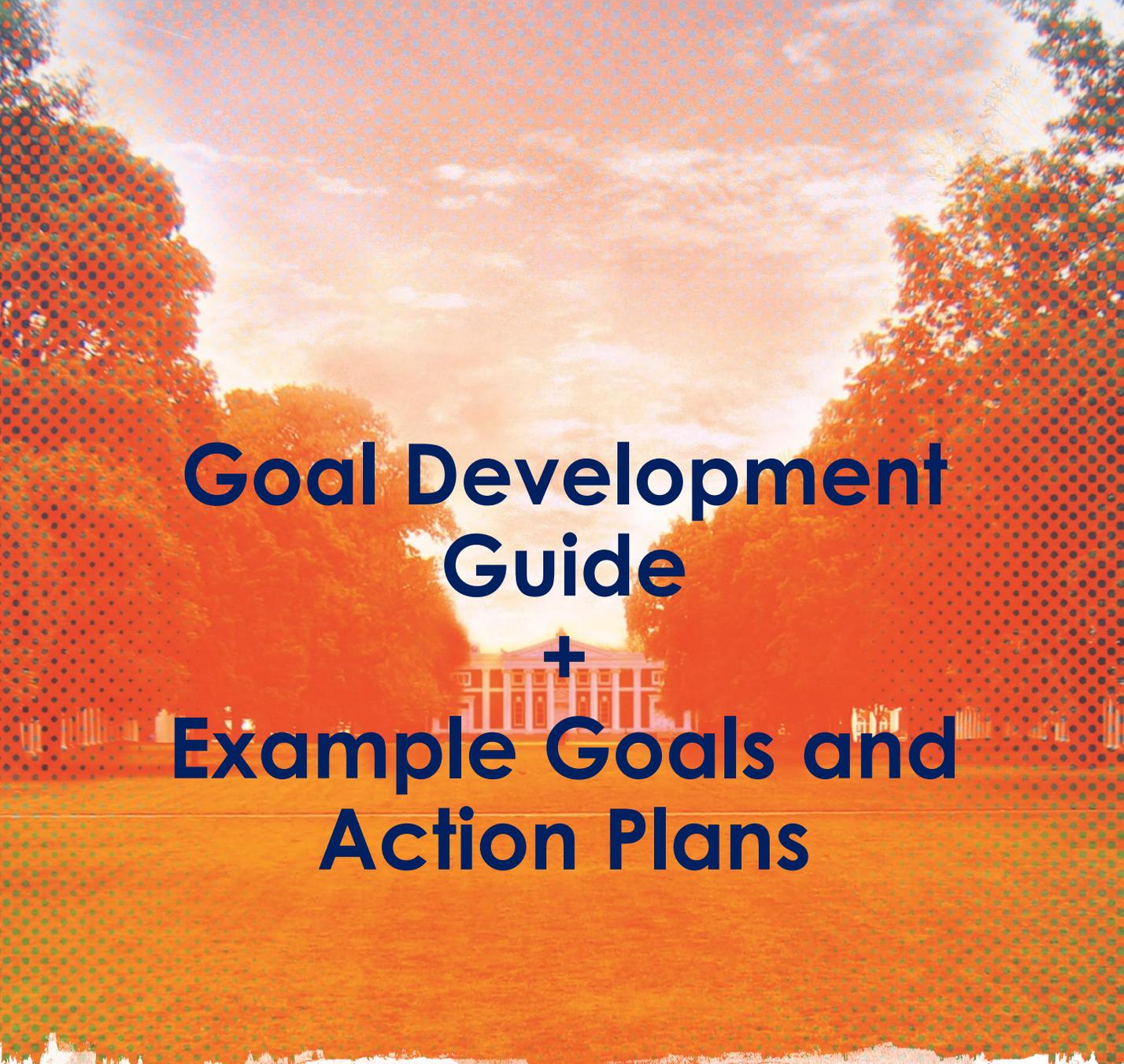
2030 Vision: *Be a strong partner with and good neighbor to our region, contributing to economic and social well-being by providing accessible healthcare, innovative education, opportunity, and engaging alumni.*

Goals/Objectives	Actions	Outcomes (Data/Metric)	Timeframe(s)	Responsible Office/Position	Funding/Resource Allocation
Goal 1					
Goal 2					

Communication Plan

What to include in this section:

- A brief overview of the ways in which you will communicate your IE plan, progress, and impacts to stakeholders, community partners, and others.
- Information on how people can stay up to date on and participate in the success of the IE plan.



Goal Development Guide + Example Goals and Action Plans

Section Description:

- The goal development guide will help you in your work to identify an aspirational goal, with clear actions, and clear measures.
- The example goals and action plans are aligned to each dimension of the IE framework and the University's strategic goals/vision.
- The examples are provided to generate thinking in your area but are not required goals for each area.

Goal Development Guide

Purpose of Tool

This guide is intended to aid in developing concrete actions with clear measures. Use a separate copy of the chart below for each goal you are proposing to address in your strategic IE plan. This worksheet will help you populate the IE plan template

1. PRIORITY YOU ARE TRYING TO ADDRESS

What is the opportunity or challenge, the need, or the new direction you would like to pursue?

EX: Creating and sustaining an inclusive and respectful environment where all students, faculty, and staff feel welcomed and valued.

2. RELEVANT FACTORS AND ASSUMPTIONS

What relevant factors impact or are related to this priority?

EX: Surveys and focus group data suggest concerns about disrespect and exclusionary behaviors directed towards employees with minoritized identities.

3. GOAL(S)

What do you want to achieve or change in regard to the above priority?

EX: Improve relationships, increase respect, and eliminate exclusionary behavior so all report feeling comfortable or very comfortable with the climate of our area.

Goal Development Guide

Purpose of Tool

This guide is intended to aid in developing concrete actions with clear measures. Use a separate copy of the chart below for each goal you are proposing to address in your strategic IE plan. This worksheet will help you populate the IE plan template

4. STRATEGIES What general strategies or approaches will you use to accomplish your goals? <i>EX: Enhance training on cross-cultural communication and an inclusive environment for all in our area, especially staff managers.</i>	5. SPECIFIC ACTIONS For each strategy, list one or more specific actions or resources you will use to develop or implement it. <i>EX: Invite and incentivize managers to participate in the UVaActs Gender inclusive workshop.</i>
6. METRICS What information will you track and review to measure both short and long term progress toward your goals? What source(s) will be used? <i>EX: Percentage of employees reporting that they feel comfortable or very comfortable with the climate of the school/area. (Data sources: SERU, COACHE, etc.)</i>	

IE Plan Example Actions & Metrics

Purpose of Tool

The items identified in this planning tool are not plan requirements, only examples. Each area's self-assessment will help to identify actions reflective of their specific missions and scope of activities/impact.

Access + Success

Primary Areas of 2030 Strategic Alignment: Foundation, Community, Discovery

Example Goal: Increase, relative to the labor market availability, the employment of staff from underrepresented or non-traditional backgrounds.

Action Example	Evidence of Change
Establish 1-2 internships with minority serving institutions to increase pathways to professional careers and strong recruitment relationships.	<ul style="list-style-type: none"> # of internships created % increase in applications from MSI graduates by equity characteristics for jobs in the internship area

Example Goal: Increase, relative to the labor market availability, the employment of staff from underrepresented or non-traditional backgrounds.

Action Example	Evidence of Change
Support hiring officials and search committees in considering contributions to inclusive excellence in every search through the standardization of IE as a measure of merit.	<ul style="list-style-type: none"> % of job applicants and new hires compared to the labor market by equity characteristic % of searches considering IE as merit Evaluation rubric created for IE as a measure of merit in selection process

Example Goal: Increase opportunities for career advancement for staff from underrepresented or non-traditional backgrounds.

Action Example	Evidence of Change
Partner with UVA Human Resources to analyze and build a comprehensive career advancement program in the area that includes a clear communication of pathways to advancement.	<ul style="list-style-type: none"> # of published career advancement pathway guides # of employees and managers accessing the guides \$ allocated to development activities % of promotions by equity characteristics

Example Goal: Improve equity in overall satisfaction with mentoring.

Action Example	Evidence of Change
Bi-annually review perceptions of employee mentoring efforts to identify improvement opportunities.	<ul style="list-style-type: none"> Change in satisfaction as measured by staff climate survey by equity characteristics # of focus groups held Narrative of process changes made

IE Plan Example Actions & Metrics

Purpose of Tool

The items identified in this planning tool are not plan requirements, only examples. Each area's self-assessment will help to identify actions reflective of their specific missions and scope of activities/impact.

Climate + Intergroup Relations

Primary Areas of 2030 Strategic Alignment: Foundation, Community, Discovery

Example Goal: Increase sense of belonging among students, faculty, and/or staff from historically underrepresented groups.

Action Example	Evidence of Change
Establish and provide support for employee resource group participation for all staff.	<ul style="list-style-type: none"> # of employees participating in employee resource groups \$ allocated to groups Narrative of group activities % change in sense of belonging by equity characteristics

Example Goal: Increase opportunities for positive interaction between students, faculty, and/or staff from different backgrounds.

Action Example	Evidence of Change
Host ## intergroup dialogues throughout the year to provide informal and/or structured opportunities for students, faculty, and staff to engage in conversation with people from different backgrounds.	<ul style="list-style-type: none"> # of sessions/dialogues hosted # of students, faculty, staff attending sessions by equity characteristics \$ allocated to hosted sessions Changes in perceptions of intergroup relations measured by surveys

Example Goal: Increase perceptions of respect in the workplace.

Action Example	Evidence of Change
Establish a consistent practice of defining norms and respectful practices for team meetings, and practices for holding managers and team members accountable for behavioral expectations.	<ul style="list-style-type: none"> # of meetings utilizing collaboratively sourced interaction norms % change in employee perceptions of respect in the workplace as measured by surveys

Example Goal: Increase overall perceptions of the importance of diversity, equity, and inclusion.

Action Example	Evidence of Change
Develop rubric with guidelines to evaluate manager's contributions to diversity, equity, and inclusion as a driver of excellence.	<ul style="list-style-type: none"> Rubrics created % of managers using rubric in annual review % change of employee perceptions of importance of diversity in area as measured by surveys

IE Plan Example Actions & Metrics

Purpose of Tool

The items identified in this planning tool are not plan requirements, only examples. Each area's self-assessment will help to identify actions reflective of their specific missions and scope of activities/impact.

Education + Scholarship

Primary Areas of 2030 Strategic Alignment: Foundation, Service, Community

Example Goal: Increase opportunities for staff and team members to gain the knowledge and skills for reciprocal engagement with communities.

Action Example	Evidence of Change
Increase the number of meetings, retreats, and planned development sessions that build key knowledge and skills for supporting community partnerships.	<ul style="list-style-type: none"> \$ in support for course development/offerings # of staff participating in sessions # of sessions held Pre and post skill evaluation scores

Example Goal: Increase opportunities for managers to engage with culturally responsive and inclusive management training/development.

Action Example	Evidence of Change
In partnership with University Human Resources, establish a core curriculum for managers in the area on the basis of mission specific/professional competencies that support excellence.	<ul style="list-style-type: none"> # of managers participating Summary of topics covered and levels of progression \$ supporting custom offerings and manager participation

Example Goal: Increase opportunities for staff to gain knowledge and skills needed to effectively engage across difference in a globally connected world.

Action Example	Evidence of Change
Develop learning outcome rubrics for public service and intercultural competencies.	<ul style="list-style-type: none"> Rubrics created # of UHR courses analyzed using the rubrics % of staff participating in courses

Example Goal: Build the capacity of managers and staff to effectively engage productive conflict in the workplace.

Action Example	Evidence of Change
Increase the number of managers and staff participating in University Human Resources difficult conversations course.	<ul style="list-style-type: none"> % of managers and staff participating % change in feeling respected at work by equity characteristics.

IE Plan Example Actions & Metrics

Purpose of Tool

The items identified in this planning tool are not plan requirements, only examples. Each area's self-assessment will help to identify actions reflective of their specific missions and scope of activities/impact.

Infrastructure + Investment

Primary Areas of 2030 Strategic Alignment: Foundation, Community, Service

Example Goal: Ensure equity in performance evaluation and promotion process.

Action Example	Evidence of Change
Facilitate an annual developmental opportunity for managers to review up to date research on opportunities to mitigate implicit bias in the evaluation process and provide guidance on promotional and workforce planning considerations.	<ul style="list-style-type: none"> Developmental sessions/dialogues held Summary of performance evaluation changes % of employees achieving promotion by equity characteristics

Example Goal: Expand access to development and education support funds that advance inclusive excellence.

Action Example	Evidence of Change
Establish a VP's fund and application process for financial support of staff development and/or education that contributes to advancing the school's equity and inclusion goals.	<ul style="list-style-type: none"> \$ total annual pool of funds \$ allocated in support # of staff receiving funds by equity characteristics

Example Goal: Promote staff well-being through investments in culturally responsive advising and mentoring.

Action Example	Evidence of Change
Establish a position for coordinating culturally responsive professional advising and mentoring.	<ul style="list-style-type: none"> Position(s) created \$ in salary support # of staff receiving advisory services by equity characteristics % Change in area/dept level mentoring perceptions

Example Goal: Incorporate inclusive excellence considerations in the performance evaluation for all employees.

Action Example	Evidence of Change
Define the way in which inclusive excellence contributes to excellence in achieving the mission and incorporate into all performance evaluations in the area/dept.	<ul style="list-style-type: none"> # of staff including the goal in the performance evaluation Annual training established for managers on evaluation practices

IE Plan Example Actions & Metrics

Purpose of Tool

The items identified in this planning tool are not plan requirements, only examples. Each area's self-assessment will help to identify actions reflective of their specific missions and scope of activities/impact.

Community + Partnership

Primary Areas of 2030 Strategic Alignment: Foundation, Community, Service

Example Goal: Deepen and expand the range of community partnerships in which staff are engaged.

Action Example	Evidence of Change
Work with the UVA Equity Center to cultivate mutually beneficial relationships between staff and community-based organizations.	<ul style="list-style-type: none"> # of new partnerships established % of CBO partners identifying perceptions of reciprocity in partnership \$ spent and/or \$ in sponsored funding for CBO connected activities

Example Goal: Contribute to community wealth building through small, local, and supplier diversity programs.

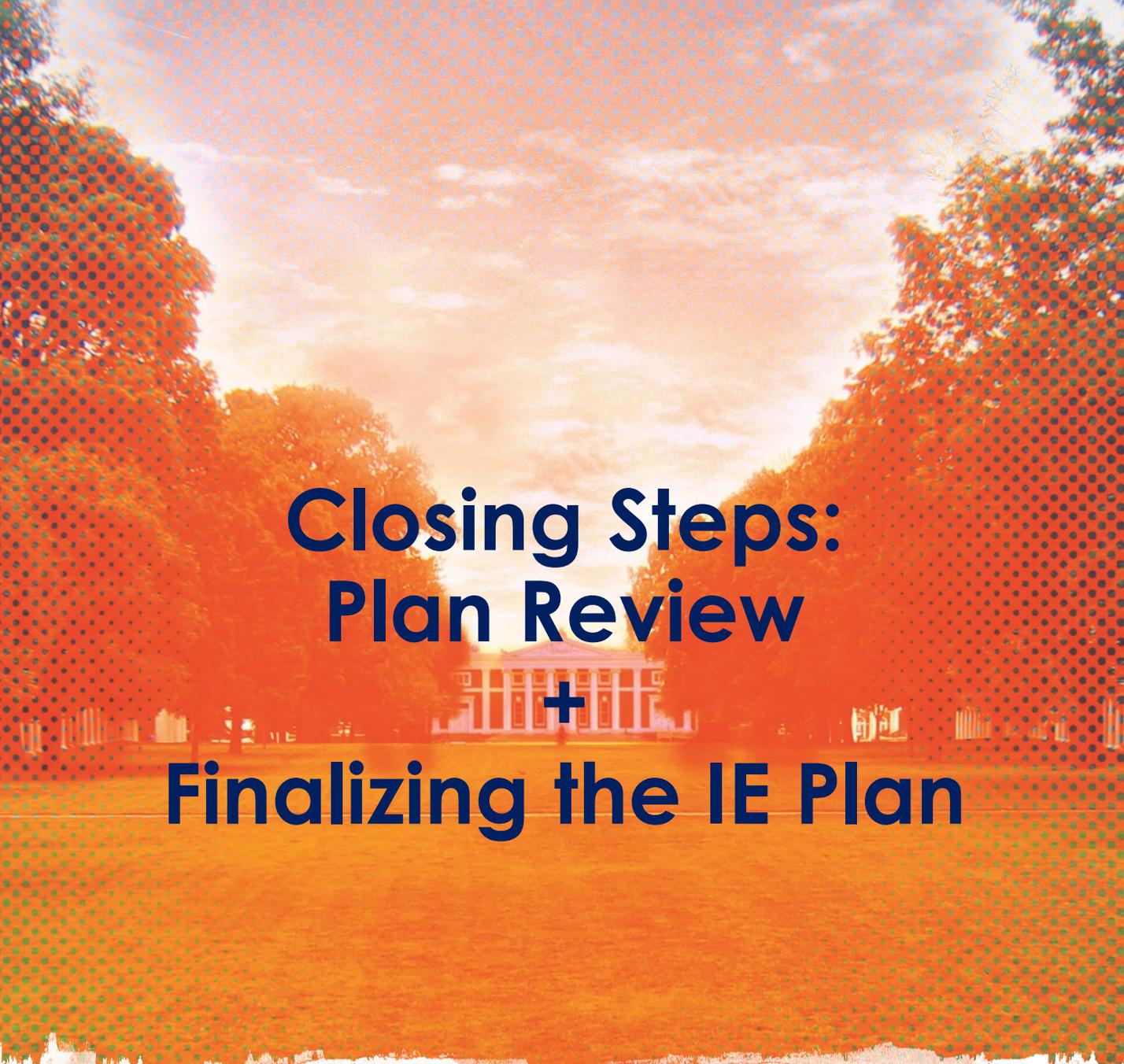
Action Example	Evidence of Change
Partner with UVA Supplier Diversity to host local/small business vendor forums with staff and purchasers by spending category (i.e. laboratory equipment, language translation services, catering)	<ul style="list-style-type: none"> # of forums held % increase in local and small business spend by category # of UVA supplier diversity consultations requested by area

Example Goal: Encourage staff to volunteer with a community based organization of their choice.

Action Example	Evidence of Change
Publicize the value of community service and the availability of paid leave to participate in volunteer activities.	<ul style="list-style-type: none"> # of service hours engaged by staff # of CBOs support % of CBO partners identifying perceptions of reciprocity in partnership

Example Goal: Increase the participation of historically underrepresented Charlottesville-area residents in public events.

Action Example	Evidence of Change
Establish an event/program evaluation database to track events by department and topic which collects participant feedback.	<ul style="list-style-type: none"> Database developed % of events/program tracked % of participants providing feedback Analysis of participation by affiliation status and location



Closing Steps: Plan Review + Finalizing the IE Plan

- When your area/department has a final draft of your IE plan you can submit it to the Division for Diversity, Equity, and Inclusion.
- Our division is engaging a group of readers from across the institution and within the community to read the plans as an additional benefit to your area to get an even broader view and set of ideas for your consideration.
- The reading phase will also help our division to look out across the range of plans to identify centralized supports and efforts that will aid our entire institution in meeting our IE goals.
- Your area has total control of what is included in the final version. Once completed you will send it to our division so we can publish all of the plans on the IE website.



Division for Diversity, Equity, &
Inclusion