



TRANSFORMING THE UNIVERSITY OF ARIZONA INTO AN INCLUSIVE EXCELLENCE

UNIVERSITY FOR THE 21ST CENTURY:

**A Guidebook for Implementing and Practicing Inclusive
Excellence**

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One of the major challenges that colleges and universities continue to face is the conceptualization and practice of diversity and all the dimensions associated with the concept. In the past, diversity has often been approached as a problem to be solved. Additionally, colleges and universities that possess a tremendous amount of diversity rarely take advantage of the benefits associated with diverse groups. Other colleges and universities attempt to increase diversity without thinking about improving the campus climate. Still others are attentive to diversity, but not inclusiveness.

The Association of American Colleges and Universities has addressed the issues outlined above by introducing the concept of Inclusive Excellence (I.E.) which conceptualizes campus diversity in a new way. The concept is more compatible with the realities of the 21st century and the educational, cultural, political, and social pressures facing institutions of higher learning.

What is Inclusive Excellence?

The concept of Inclusive Excellence:

- a) moves a university away from a simplistic definition of diversity and toward a more inclusive, comprehensive, and omnipresent notion of inclusiveness in which diversity includes (but is not limited to) disability status, gender identity and expression, sexual orientation, age, religion, race/ethnicity, color, nationality, citizenship status, veteran status, and other important social dimensions;
- b) melds inclusiveness and academic excellence into one concept (to be excellent, we must be inclusive);

- c) shifts the responsibility for diversity and inclusiveness to everyone on campus as opposed to one unit or department shouldering the responsibility;
- d) moves an institution away from conceptualizing diversity only in terms of a numerical goal of diverse constituents and broadens it to include multicultural perspectives, experiences, worldviews, cultures, and other gifts and talents;
- e) focuses on the structural cultural transformation of a university into a community that embeds diversity and inclusiveness throughout the institution, including (but not limited to) demographics, facilities, curriculum, policies, enrollment, pedagogies, financial resources, fund raising, leadership, trainings, clubs & organizations, events, retention, student learning, marketing, technology, student advising, athletics, campus climate, communications, administration, recruitment, retention, graduation, hiring, promotion and tenure, assessments, institutional advancement, and evaluations.

In sum, Inclusive Excellence is a strategy for transforming the UA into an institution that conceptualizes inclusiveness and excellence as one in the same, makes inclusiveness ubiquitous, assigns responsibility for inclusiveness to everyone on campus, and utilizes a broad definition of diversity.

In pursuit of a multiplicity of educational and social outcomes, an inclusive institution capitalizes on the varied rich backgrounds, perspectives, talents, and cultures that diverse individuals and groups bring. Such colleges and universities advance social progress among the communities they serve and also promote inclusive working learning for all. Stated differently, I.E. institutions perceive diversity and inclusiveness as resources that offer tremendous benefits and work towards cultivating, utilizing, and embedding the concepts in all areas of the institution. Ultimately, I.E. is about all employees and students, how they work and learn, and their exposure to diverse learning outcomes and interacting with diverse people. It prepares all of UA's students for living, studying, and working in an increasingly diverse society.

There has been much accomplished at the UA in the past: programs, projects, celebrations and other initiatives. Inclusive Excellence will take us to the next level by systematically embedding and practicing diversity and inclusiveness into all aspects of the institution. Transforming the culture will require time, sustained effort, resources, and creativity from vice presidents, deans, directors, heads, diversity committees, and many others who serve in leadership positions. However, we will experience changes and improvements over time.

This guidebook is a step-by-step “how to” approach to implementing and practicing Inclusive Excellence. Given that each unit is different, this document is simply a guide and its contents are not a requirement. The document can be modified to fit each unit. For example, a dean may choose to approach implementing and embedding I.E. using a completely different innovative approach. In Step I, we suggest forming an I.E. committee. However, in some units, a committee may not be appropriate, and the unit may want to develop

an implementation mechanism appropriate to their structure.

STEP I: Organizing an Inclusive Excellence Committee

The initial step is to organize an Inclusive Excellence Committee at the college- or unit-level that will undertake the work of implementation. This committee will report to the top-level administrator (e.g., dean, director) on progress or issues regarding the implementation and practice of I.E. The goal should be to have a diverse committee. Gender, disability, race, ethnicity, sexual orientation and other social dimensions should be considered. Also, the committee should have faculty, staff, and students who will undoubtedly bring different perspectives.

Top-level administrators need to convey that the committee's work is important. Moreover, the committee needs to know the expectations and goals of the administrator in charge. One expectation is that the committee will produce change throughout the unit by recommending and overseeing the implementation of action items.

STEP II: Utilizing the Guidebook

The next step is to begin using the guidebook to undertake a thorough review of the unit. Some categories may not be applicable to some units. For example, a curriculum review may be appropriate for an academic unit, but not for an administrative unit. Implementing I.E. and embedding inclusiveness is not a short-term process. There may be some issues that can be addressed easily and quickly, but other issues will take longer and more effort to address. The literature suggests that the full transformation into an I.E. institution will be a 7–8 year process.

This document consists of a four-phase plan to help your unit improve its practice of Inclusive Excellence: 1) Inventory, 2) Analysis, 3) Inclusive Excellence Plan and Action, and 4) Assessment and Metrics.

PHASE ONE: INVENTORY FOR INCLUSIVE EXCELLENCE

Taking stock of how your unit is doing in implementing Inclusive Excellence

Committee Instructions: Use the following worksheets to review your unit.

- “Unit” means the program, department, division, or school under consideration. Be clear on the specific unit you are describing so that you can outline strengths and areas for improvement in units you are actually responsible for and can make changes in. The guide is designed to review aspects of your unit, not the campus as a whole.

- In the last column, describe some of the reasons for the committee’s response. Be specific as details will help you improve.
- For each item, keep in mind that the UA uses a broad definition of diversity that includes sexual orientation, disability, gender identity, nationality, religion, race/ethnicity, veteran status, and other important groups.
- Some of the categories may not apply to your unit; you can skip these (mark “NA”) and/or consider how your unit impacts the larger organizational structure of which you are a part.
- There may be areas unique to your unit not present in the inventory. Feel free to add categories to review.

1. Goals and Values	Yes	No	NA	Evidence of completion (e.g., numbers, documents, programs, etc.) or explanation for marking “No”
A. Does our unit have a diversity/inclusiveness statement as part of our values and goals that clearly espouses the value of Inclusive Excellence (see Appendix I)?				
B. Is the statement aligned with and in support of the larger University diversity statement and the University strategic plan?				
C. Is the statement prominently displayed on our marketing materials, website, job postings, posters, and other unit materials?				

2. Leadership	Yes	No	NA	Evidence of completion (e.g., numbers, documents,
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				programs, etc.) or explanation for marking “No”
A. Does our top-level unit administration express the value of diversity and inclusiveness at speaking engagements?				
B. Has top-level administration participated in diversity and inclusiveness training?				
C. Have leaders allocated resources to support diversity and inclusiveness initiatives?				
D. Does the unit have a diversity and inclusiveness plan?				

3. Human Resources	Yes	No	NA	Evidence of completion (e.g., numbers, documents, programs, etc.) or explanation for marking “No”
A. Is inclusiveness embedded as a responsibility in all staff and faculty job descriptions?				
B. Is the unit’s diversity/inclusiveness statement prominently displayed on all job postings and other HR documents?				
C. Is inclusiveness an integral part of employee orientation?				
D. Are there incentives for employees for professional development in the areas of diversity and inclusiveness?				

E. Are evaluation and merit conceptualized to include diversity and inclusiveness (i.e., are employees evaluated and rewarded for contributions to diversity/inclusiveness)?				
F. Does the person responsible for HR (or other members of management and leadership) in our unit meet periodically with diverse employees to determine how they are doing and to offer support?				
G. Is there an in-house leadership development program to train employees from different backgrounds for promotions into higher level positions?				
H. Do search committees take an active approach to the recruitment of diverse employees (e.g., networking, phone calls, membership in diverse organizations)?				

4. Climate and Culture	Yes	No	NA	Evidence of completion (e.g., numbers, documents, programs, etc.) or explanation for marking “No”
A. Do students, staff, faculty, alumni, and community members from different backgrounds feel welcome working, studying, and visiting our unit?				
B. Has our unit conducted a diversity climate assessment examining student, faculty, and staff behaviors or perceptions about diversity/inclusiveness?				
C. Are faculty, staff, and students aware of micro-aggressions (subtle insults, sometimes unintentional, that can have a cumulative effect) directed at diverse groups?				
D. Are the traditions and celebrations of the unit inclusive? Are foods provided at events inclusive of dietary restrictions (i.e., kosher, vegan, etc.)?				
E. Does the unofficial culture support diversity? For example, a unit may express the value of diversity but simultaneously have an unofficial culture filled with racist, sexist, ablelist, and heterosexist jokes, behaviors, or traditions.				
F. Do faculty, staff, administrators, and students play an active role in maintaining and improving the climate for diversity?				
G. Is there a unit protocol for reporting bias incidents above and beyond the UA process involving the Dean of Students and Office of Institutional Equity?				

5. Organizational Dimensions	Yes	No	NA	Evidence of completion (e.g., numbers, documents, programs, etc.) or explanation for marking “No”
A. Are individuals from different groups represented in unit leadership and management?				
B. Is diversity and inclusiveness included in the strategic planning and decision-making process of the unit?				
C. Does our unit have an advisory board? Is the board diverse in terms of representation (e.g., gender, race, sexual orientation, disability)?				
D. Are members of the unit aware of the Affirmative Action plan for your unit?				
E. Does the unit have a process for learning about the experiences of diverse students, staff, and faculty (e.g., listening tours, open forums, one-on-one meetings, surveys, etc.)?				

6. History	Yes	No	NA	Evidence of completion (e.g., numbers, documents, programs, etc.) or explanation for marking “No”
A. Does the unit acknowledge the history of contributions of diverse groups (e.g., women, Native Americans, LGBTIQ, disabled people, etc.) to the unit or discipline?				

7. New Student Orientation	Yes	No	NA	Evidence of completion (e.g., numbers, documents, programs, etc.) or explanation for marking “No”
A. Is the unit’s diversity and inclusiveness statement provided to all students?				
B. Is diversity/inclusiveness training or information provided to new students?				
C. Are students provided with the skills and knowledge to successfully navigate diversity in and out of the classroom (e.g., skills for using civil discourse)?				
D. Is information provided during student orientation on campus resources to support diverse students, such as the culture centers and resources to support students with disabilities, international students, first-generation students, non-English speakers, veterans, etc.?				

8. Faculty and Staff Orientation	Yes	No	NA	Evidence of completion (e.g., numbers, documents, programs, etc.) or explanation for marking “No”
A. Do faculty and staff orientations include information on diversity/inclusiveness?				
B. Is the unit’s diversity statement shared with new faculty and staff?				
C. Is there training for faculty on diversity and inclusiveness in the classroom?				

9. Student Advising	Yes	No	NA	Evidence of completion (e.g., numbers, documents, programs, etc.) or explanation for marking “No”
A. Are advisors trained to address issues of diversity/ inclusiveness when working with diverse populations?				
B. Are advisors knowledgeable of the resources on campus available for diverse students?				
C. Is the advising staff diverse?				
D. Are advisors engaging in outreach to diverse students (e.g., presentations at student meetings, involvement in multicultural events)?				

10. Curriculum	Yes	No	NA	Evidence of completion (e.g., numbers, documents, programs, etc.) or explanation for marking “No”
A. Is there a diversity course requirement for our unit?				
B. Does the unit offer courses on diversity or courses that incorporate diversity?				
C. Do courses integrate literature from authors of diverse backgrounds (e.g., people of color, women, disabled people, LGBTIQ people, non-western authors, etc.)?				
D. Has the unit identified student learning outcomes and concepts related to diversity (e.g., cultural competencies, privilege, social justice, access, etc.)?				
E. Do course evaluations have supplemental items regarding inclusiveness in the classroom?				
F. In class introductions, are students offered the opportunities to voluntarily share the pronouns that they prefer for themselves (e.g., he, she, they, them, etc.)?				
G. Do course syllabi include a diversity statement or inclusiveness statement?				
H. Although the UA has not reached a consensus on the issue, have unit faculty discussed the issue of content warnings (e.g., pros and cons, implications for students, feasibility of implementation, etc.)?				

11. New Projects and Initiatives	Yes	No	NA	Evidence of completion (e.g., numbers, documents, programs, etc.) or explanation for marking “No”
A. Are inclusiveness and diversity part of new projects or initiatives that are introduced to the unit?				
B. Is there a procedure that encourages the incorporation of diversity and inclusiveness into new programs and initiatives?				
C. Are individuals from diverse backgrounds included in the planning of new projects or initiatives?				
D. Is inclusiveness embedded into the project evaluation process?				

12. Faculty Promotion and Tenure	Yes	No	NA	Evidence of completion (e.g., numbers, documents, programs, etc.) or explanation for marking “No”
A. Is inclusiveness embedded in the promotion and tenure process? Are faculty rewarded and recognized for their contributions and involvement in mentoring diverse students, teaching diversity courses, embedding diversity into their courses, and other diversity-related activities?				
B. Are faculty who serve on promotion and tenure committees aware of the way diversity impacts the tenure and promotion process for women, people of color, disabled people, and other diverse groups?				

13. Financing and Budget	Yes	No	NA	Evidence of completion (e.g., numbers, documents, programs, etc.) or explanation for marking “No”
A. Does the budget for the unit include financing for diversity and inclusiveness initiatives?				
B. Are diversity and inclusiveness initiatives and projects adequately financed (compared to other priorities in the unit)?				
C. Are diversity initiatives financed by the unit’s budget instead of temporary funding?				

14. Committees and Taskforces	Yes	No	NA	Evidence of completion (e.g., numbers, documents, programs, etc.) or explanation for marking “No”
A. Does the unit consider diversity when inviting members to be on committees and taskforces?				
B. Is diversity and inclusiveness included in the charge of the committees or taskforces?				

15. Policies (Not ABOR Policies)	Ye s	N o	NA	Evidence of completion (e.g., numbers, documents, programs, etc.) or explanation for marking “No”
A. Are the policies of the unit inclusive (i.e. take into consideration gender, race/ethnicity, disability, etc.)?				
B. When creating new policies, is the potential impact on diverse groups taken into account?				

16. Managing Conflict and Discrimination	Yes	No	NA	Evidence of completion (e.g., numbers, documents, programs, etc.) or explanation for marking “No”
A. Is unit leadership aware of the resources on campus for addressing discrimination (e.g., Institutional Equity, Dean of Students, Ombuds program, etc.)?				

17. Student Recruitment, Retention, and Graduation	Yes	No	NA	Evidence of completion (e.g., numbers, documents, programs, etc.) or explanation for marking “No”
A. Is there a unit plan to recruit, retain, and graduate more undergraduate or graduate students of color, women, and students from other diverse groups?				
B. Are there resources allocated for recruiting, retaining, and graduating students of color, women and other students from diverse groups?				

18. Community Engagement and Outreach	Yes	No	NA	Evidence of completion (e.g., numbers, documents, programs, etc.) or explanation for marking “No”
A. Are there efforts from the unit to participate and support diverse community groups and activities (e.g. non-profits, support groups, charities)?				
B. Does the unit undertake outreach to potential students and their parents from our regional diverse communities, such as Native Nations, border regions, and the Hispanic community?				

19. Art Work	Yes	No	NA	Evidence of completion (e.g., numbers, documents, programs, etc.) or explanation for marking “No”
A. Is the art work (e.g., photos, paintings, posters) in our unit inclusive?				
B. Is there a policy or process that encourages inclusiveness in the selection of art work for our unit?				

20. Fund Raising	Yes	No	NA	Evidence of completion (e.g., numbers, documents, programs, etc.) or explanation for marking “No”
A. Does the unit raise funds from donors or other sources for diversity projects and initiatives?				
B. Are development officers aware of the diversity needs of the unit?				
C. Is there a diversity and inclusiveness strategic fundraising component for the unit?				

21. Marketing and Promotional Materials	Yes	No	NA	Evidence of completion (e.g., numbers, documents, programs, etc.) or explanation for marking “No”
A. Is the unit’s website inclusive and accessible (e.g., photos, statements, videos, captioning, etc.)?				
B. Has the unit’s website been reviewed by the Disability Resource Center to ensure it complies with best practices?				

C. Is there a policy or process that encourages inclusiveness and accessibility in creating or updating our unit's website?				
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22. Cultural Competency Training	Yes	No	NA	Evidence of completion (e.g., numbers, documents, programs, etc.) or explanation for marking "No"
A. Are all employees (including top-level administrators) asked to undergo cultural competency training?				
B. Are there opportunities in our unit for faculty to develop cultural competency?				

23. Research and Funding	Yes	No	NA	Evidence of completion (e.g., numbers, documents, programs, etc.) or explanation for marking "No"
A. Are researchers encouraged to think about diversity and inclusiveness conceptualizing their research projects?				
B. Is diversity taken into consideration when employing research assistants or other positions supported by a grant or contract?				
C. Is there adequate funding for centers and departments specifically undertaking diversity research and their operational costs?				
D. Has your unit actively sought available external funding opportunities to support efforts in your area of inquiry to include diversity and inclusiveness?				

24. Physical Structure	Yes	No	NA	Evidence of completion (e.g., numbers, documents, programs, etc.) or explanation for marking “No”
A. Is the building accessible to students with disabilities? If not, is there a plan to rectify the lack of accessibility?				
B. Are there gender-inclusive bathrooms in the building?				
C. Are there baby-changing stations in the bathroom facilities?				
D. Is there a lactation room in our building?				
E. Are there quiet spaces available for diverse students to fulfill their religious obligations (e.g., Muslim students, students who meditate)?				
F. Are our study lounges welcoming and inclusive of diverse communities (e.g., photos, signage, wheelchair accessible, etc.)?				

25. Hispanic Serving Institution Status	Yes	No	NA	Evidence of completion (e.g., numbers, documents, programs, etc.) or explanation for marking “No”

A. Are unit faculty, staff, and administrators aware of UA's interest in becoming a Hispanic Serving Institution (e.g., what it is, the benefits, and how to contribute)?				
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26. Philosophy, Language and Terminology	Yes	No	NA	Evidence of completion (e.g., numbers, documents, programs, etc.) or explanation for marking "No"
A. Does the unit take an asset-based approach to students that highlights or focuses on the gifts and talents that diverse students bring to the academic endeavor (as opposed to a deficit model that focuses on students' weaknesses)?				
B. Does the unit use asset-based language (e.g., scholars, gifted, talented, skilled, etc.) as opposed to deficit-based terminology (e.g., minority, lack of cultural capital, culturally-deprived, etc.)?				

27. Student Affairs and Services	Yes	No	NA	Evidence of completion (e.g., numbers, documents, programs, etc.) or explanation for marking "No"
A. Does the unit have a Student Affairs/Services office that includes services to diverse students? Is the multicultural services part of Student Affairs adequately funded?				

B. Is the Student Affairs/Services office knowledgeable of resources to refer diverse students for additional support (e.g., counseling, cultural centers)?				
C. Does the unit collect information about student issues including the experiences of non-traditional students, under-resourced students, or food and housing insecure students?				
D. Does the unit accommodate the schedules of non-traditional and commuter students?				

28. Data Collection and Assessment	Yes	No	NA	Evidence of completion (e.g., numbers, documents, programs, etc.) or explanation for marking “No”
A. Does the unit collect data to assess progress on diversity and inclusiveness goals?				
B. Are the assessment results shared and discussed with faculty, staff, students and decision-makers in our unit?				
C. Are the assessment results utilized to drive improvements and innovation in our unit? Are the results used in performance evaluations?				

PHASE TWO: ANALYSIS

How well is the unit practicing and implementing Inclusive Excellence?

Use the following questions to analyze the inventory completed in Phase One. Your goal is to see what needs to be done.

Areas of Strength:

What are our areas of strength? Where is inclusiveness being practiced?

How can we maintain or enhance those areas?

How can we celebrate and communicate those successes that have led to greater inclusiveness?

Areas of Improvement:

In which areas does the unit need to improve (i.e., areas where inclusiveness needs to be embedded)?

Are there areas that could quickly and easily be changed to be more inclusive? If so, which areas?

Are there areas that will take longer to improve? If so, which areas?

What resources do we have and/or need in order to make improvements?

PHASE THREE: DEVELOPING AN INCLUSIVE EXCELLENCE ACTION PLAN

How will you move forward in practicing and implementing Inclusive Excellence?

Use the matrix below to layout a detailed plan for how the area will implement Inclusive Excellence (see example). The goal here is to develop an Inclusive Excellence plan for the year.

Action Item	Action Step	Who’s Responsible? (Accountability)	Timeline/Deadline	Priority (Low, moderate, High)
<i>EXAMPLE I Is the UA Diversity and Inclusiveness statement shared with all students, faculty, and staff?</i>	<i>Email the UA Diversity and Inclusiveness statement to all students, faculty, and staff.</i>	<i>A high level administrator (e.g. dean, vice president, director) within the school or department.</i>	<i>At the beginning of each fall semester.</i>	<i>High (relatively simple)</i>
<i>EXAMPLE II Is the art work (e.g., photos, paintings, posters, statues) in your unit inclusive?</i>	<i>Form a committee to begin the selection of diverse and inclusive art work.</i>	<i>Art work selection committee.</i>	<i>April 2017</i>	<i>Medium (short-term somewhat complicated)</i>

PHASE FOUR: ASSESSMENT AND METRICS

How will you measure progress and change?

As an Inclusive Excellence plan for the unit is developed, it should include a plan for assessments or metrics related to changes. In some cases, the metrics will include numbers and benchmarks. In other cases, the metrics will be qualitative and report changes in policies, procedures, curriculum, and other types of improvements.

The UA Office for Diversity and Inclusive Excellence (520-621-8676) is available as an ongoing resource as you or your unit reviews, plans, and practices I.E.

This guidebook is based on and adopted from a toolkit originally developed at the University of Denver by Jesus Treviño, Johanna Leyba, and Thomas Walker.

APPENDIX I:

EXAMPLES OF DIVERSITY STATEMENTS

A.) Diversity and inclusiveness are values that are embraced and practiced at the University of Arizona. Our unit respects and values gender identity, gender expression, sex, race, ethnicity, disability status, religion, sexual orientation, nationality, age, veteran status, and other important social identities.

B.) Advancing diversity and inclusiveness is highly valued at the University of Arizona. Our unit adheres to the values and principles outlined in the University of Arizona Inclusive Excellence Statement. We also strive to provide outstanding services that are inclusive of gender identity, gender expression, sex, race, ethnicity, disability status, religion, sexual orientation, nationality, age, veteran status, and other important social identities.

C.) We respect and value diversity and inclusiveness in our department. Thus, gender identity, gender expression, sex, race, ethnicity, disability status, religion, sexual orientation, nationality, age, veteran status, and other important social identities are accepted and respected in our department.

D.) We are committed to providing the best services for all members of the UA community. Our department practices and values diversity and inclusiveness. We respect and value gender identity, gender expression, sex, race, ethnicity, disability status, religion, sexual orientation, nationality, age, veteran status, and other important social identities. Furthermore, we adhere to the values and principles found in the University of Arizona Inclusive Excellence Statement.