

# Inclusive Excellence Toolkit<sup>1</sup>

## 2019-2024

### BACKGROUND

At Ball State University, we recognize inclusive excellence as an integral endeavor to fulfill our University's mission and our strategic plan. We recruit, support, and retain a diverse population of students, faculty, and staff. We encourage and reward diversity of thought. We promote a work environment that encourages and rewards innovation and creativity. We pledge to keep inclusive excellence at the highest level of institutional importance and as a foundation in all that we strive to do. As such, the Office of Inclusive Excellence has established a comprehensive and well-coordinated set of systemic actions that focus specifically on fostering greater diversity and inclusion on our campus. Our overarching goal for Inclusive Excellence is to adopt a university-wide inclusive excellence approach to academic, business, and service functions of the university. We believe Inclusive Excellence must be intentional and infused in every step we take.

Inclusive Excellence (IE) was developed by experts at the [Association of American Colleges and Universities \(AAC&U\)](#) as a way to re-imagine diversity and inclusion as the active process of making excellence inclusive and the responsibility of everyone. They note, "The action of making excellence inclusive requires that we uncover inequities in student (faculty and staff) success, identify effective educational (and operational) practices, and build such practices organically for sustained institutional change."

This Toolkit is intended for the Ball State campus to begin the discussion, exploration, and practice of embedding inclusiveness throughout the campus and areas of responsibility.

### INCLUSIVE EXCELLENCE

In using the toolkit, it is important to keep in mind several key ideas:

- Inclusiveness and excellence are conceptualized as one and the same - to practice inclusiveness is excellence.
- IE shifts the responsibility for diversity and inclusiveness to everyone on campus, as opposed to one individual or department shouldering that responsibility alone. One person can drive the process; but the

responsibility for change and inclusiveness is assumed by every person in an office, division or the campus.

- IE changes the way the university has historically conceptualized diversity - as a numerical goal (numbers only) of diverse faculty, staff, and students. Instead, under IE, numbers continue to be important, but the emphasis is on transforming the institution into a vibrant community that embeds diversity throughout the institution.
- IE employs a broad definition of diversity that includes dis/ability, gender identity, gender expression, sexual orientation, race/ethnicity, religion, nationality, age and other important social dimensions that are part of a community.

One of the assumptions supporting Inclusive Excellence is that diversity is an integral asset to the mission of the University. Diversity is not an occasional element to be considered on special occasions or measured simply by numbers. Nor is it an "issue" to be managed, contained and problem-avoided. Rather, diversity is a constant benefit to be actively, intentionally, and consistently engaged with the objective of achieving numerous learning and organizational outcomes. Stated differently, the gifts, talents, histories, traditions, worldviews, and cultures that our diverse the diverse communities bring to the University is a form of "gold" that can be "mined" to produce a multiplicity of educational outcomes and improve the climate for inclusiveness at the University. These diverse communities include but are not limited to: Race, Ethnicity, Religious Groups, Gender, and Sexual Orientations. Inclusive Excellence is the method by which you mine that gold and use of this toolkit represents the beginning of that process.

Thoughtful policies and procedures are important forces for breaking down barriers to inclusion, but it is the daily work of individuals that builds community. This toolkit and assessment are consistent with the spirit of the **Beneficence Pledge** and are designed to foster an inclusive culture on our campus and in our community. The ultimate goal is to make inclusiveness a habit practiced by everyone at the university.

Keeping the above in mind, we invite you to use the following worksheets to help you in practicing and implementing Inclusive Excellence!

### USING THE TOOLKIT

This toolkit consists of a three-phase set of worksheets to help your unit improve its practice of Inclusive Excellence: 1) Inventory/Assessment, 2) Analysis, and 3) Action.

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<sup>1</sup> The Ball State Inclusive Excellence Toolkit was adapted, with permission, from the University of Denver Inclusive Excellence Toolkit by Treviño, Walker & Leyba (2009).

## PHASE ONE: ASSESSMENT

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

Use the tables below to think through an overview of inclusiveness in your unit in each of the 6 areas that correspond with the **Ball State Inclusive Excellence (IE) Plan Goals of: Recruitment; Retention; Rewards & Recognition; Inclusive Excellence Training, Development, and Curriculum; Campus Culture, Climate, and Community; and Systems, Policies and Procedures.**

- By “unit,” we mean the division or your department. It is important to be clear on what specific area you are describing, so that you outline the strengths and change areas for which you are actually responsible and in which you can actually make change. (Considering the entire campus for some questions, and a specific department for others will greatly skew your description, and ultimately your action plan!)
- Challenge yourself (selves) to be honest about whether, on the whole, your area is or is not described by the question. Answering “no” does not mean you/your area is bad, any more than answering “yes” means there isn’t more that could be done.
- In the last column, describe some of the reasons for your response. Be specific and honest, as the details will help you continue/improve.
- Some of the areas may not apply to your unit; you can skip these (mark “NA”), and/or consider how your unit does/can have an impact on the larger organizational structures of which you are a part. Use broad definitions when considering the applicability to your unit.
- Feel free to add additional measures (one blank row is provided) as they apply to your specific area.

<b>IE GOAL 1 – RECRUITMENT</b>	<b>Yes</b>	<b>No</b>	<b>In Progress</b>	<b>NA</b>	<b>Evidence of completion (e.g., numbers, documents, programs, etc.)</b>
Do employees actively assist in efforts to recruit and retain diverse undergraduate and graduate student populations?					
Is the unit’s diversity/inclusive excellence statement prominently displayed on all job applications, job advertisements, and other HR documents?					
When hiring new employees, does the unit have policies and procedures designed to diversify the pool of qualified applicants?					
Is the safety, comforts, and needs of diverse students considered in planning orientation? (e.g., LGBTQ students, Students of Color, Students with Disabilities, Jewish or Muslim students, etc.)					
Are multiple individuals from diverse groups represented within the unit’s leadership and management?					
Are multicultural competencies (i.e., attitudes, knowledge, and skills) a hiring criterion for new employees?					

<b>IE GOAL 1 – RECRUITMENT, cont.</b>	<b>Yes</b>	<b>No</b>	<b>In Progress</b>	<b>NA</b>	<b>Evidence of completion (e.g., numbers, documents, programs, etc.)</b>
Are marketing materials inclusive of diverse students, faculty, or staff?					
Does the unit have a history of including members of diverse groups in the selection processes for students, faculty, and staff?					
Are open positions being advertised to a diverse audience?					
Is inclusive excellence, as one of many responsibilities, embedded in all employee position descriptions? (i.e., everyone in the unit has responsibility for diversity and inclusive excellence).					
Is inclusive excellence an integral part of employee orientation in your unit?					
Notes:					
<b>IE GOAL 2 – RETENTION</b>	<b>Yes</b>	<b>No</b>	<b>In Progress</b>	<b>NA</b>	<b>Evidence of completion (e.g., numbers, documents, programs, etc.)</b>
Does a clearly defined advocate/special services position exist within the unit to address the needs and concerns of diverse students/faculty/staff (e.g. persons with disabilities, older persons, religious and racial/ethnic minority persons, various genders) albeit with a clear understanding that advocacy and support is the responsibility of multiple units across campus.					
Is the unit's diversity/inclusive excellence statement provided to all incoming students and/or student employees?					
Are staff and faculty being mindful of not using language, strategies, microaggressions, or stereotyping that could potentially impede students' success?					
Is there an in-house program designed to train and prepare graduate students for future research and employment opportunities?					
Is there an in-house program designed to train and prepare employees and faculty from different backgrounds for promotions in higher level positions?					
Is there a current retention plan in place for diverse faculty and staff?					
Is there a current retention plan in place for diverse students?					

Is the unit aware of field-specific barriers to the academic progress and achievement of diverse students?					
Notes:					
<b>IE GOAL 3 Rewards and Recognition</b>	<b>Yes</b>	<b>No</b>	<b>In Progress</b>	<b>NA</b>	<b>Evidence of completion (e.g., numbers, documents, programs, etc.)</b>
Is inclusive excellence embedded in the evaluation, promotion, and/or merit process? Are employees recognized and valued for their contributions to mentoring diverse students/employees; teaching diversity courses; embedding diversity into their courses/training; and other diversity activities?					
Does the unit have annual awards that recognize individuals for their contributions to diversity and inclusive excellence?					
Are employees recognized and valued for their contributions to mentoring diverse students/employees?					
Are there individuals from diverse backgrounds who made contributions to the unit and who are no longer with the unit included in the history?					
Are incentives for professional development in the areas of diversity and inclusiveness available for employees?					
Does the unit support related community-based inclusive excellence and diversity events?					
Notes:					
<b>IE GOAL 4 – INCLUSIVE EXCELLENCE TRAINING, DEVELOPMENT, &amp; CURRICULUM</b>	<b>Yes</b>	<b>No</b>	<b>In Progress</b>	<b>NA</b>	<b>Evidence of completion (e.g., numbers, documents, programs, etc.)</b>
Has leadership participated in diversity training along with other employees, giving a message to the rest of the unit of the importance of learning about and understanding diversity and inclusiveness?					
Is inclusive excellence embedded in the project evaluation process?					
Are students in your unit provided with the skills and knowledge to successfully manage and deal with diversity? (e.g. how to discuss issues of diversity using civil discourse, skills or interacting with individuals who are different, etc.).					

<b>IE GOAL 4 – INCLUSIVE EXCELLENCE TRAINING, DEVELOPMENT, &amp; CURRICULUM cont.</b>	<b>Yes</b>	<b>No</b>	<b>In Progress</b>	<b>NA</b>	<b>Evidence of completion (e.g., numbers, documents, programs, etc.)</b>
Do employees of the unit possess multicultural competencies appropriate for their role and function?					
Are diversity and inclusiveness professional development workshops and opportunities available to employees?					
Has the unit identified student learning outcomes and concepts related to diversity? (i.e. cultural)					
Are intern and practicum students trained in and evaluated on multicultural competencies?					
Is there a diversity training requirement for the unit?					
Does the training cover a wide range of social identities, groups, or concepts? (e.g. African American, Women, LGBTQ, racism, disability, etc.,)					
Are staff knowledgeable of the resources on campus available to support diverse students?					
Are staff trained to address issues of diversity/inclusive excellence and work with diverse populations?					
Is there a diversity/inclusive excellence training or information provided to new students and/or student employees?					
Are there equitable courses curriculum, or learning opportunities for diverse students to achieve their academic goals?					
Notes:					
<b>IE GOAL 5 – Culture and Climate of Inclusion</b>	<b>Yes</b>	<b>No</b>	<b>In Progress</b>	<b>NA</b>	<b>Evidence of completion (e.g., numbers, documents, programs, etc.)</b>
Does the unit foster and support affinity groups? (e.g., African American Employees, LGBTQIA+ Student Groups, etc.)					
Does the Unit have a diversity or inclusive excellence statement as part of their mission, values, and goals that clearly espouses the value of inclusive excellence?					
Are goals within the unit examined and evaluated annually with regard to multiculturalism?					
Does management and leadership in the unit meet periodically with diverse employees to determine how they are doing and to offer support?					

<b>IE GOAL 5 – Culture and Climate of Inclusion, cont.</b>	<b>Yes</b>	<b>No</b>	<b>In Progress</b>	<b>NA</b>	<b>Evidence of completion (e.g., numbers, documents, programs, etc.)</b>
Do student activities include the systematic development of leadership skills in people who are female, members of an ethnic/racial minority, physically disable, and members of other underrepresented student groups?					
Does your unit provide an area for prayer or a private area for nursing mothers, etc.					
Is the unit's diversity/inclusive excellence statement prominently displayed in or on your marketing materials, website, job applications, wall art/posters, and other unity materials?					
Does the unit assess whether diverse students, staff, and faculty feel welcome in your unit?					
Do staff, administrators, and students have an active role in maintaining and improving the climate for diversity?					
Are staff undertaking outreach to diverse students? (e.g., presentations at student organization meetings, involvement in multicultural events and activities).					
During public and in-house speaking opportunities, does leadership within the unit express the value of diversity and inclusiveness?					
Does leadership practice diversity/inclusive excellence? (e.g. the value of diversity and inclusiveness is supported through actions)					
Has leadership participated in diversity training?					
Has leadership participated in diversity training along with all other employees, giving a message to the rest of the unit of the importance of learning about and understanding diversity and inclusiveness?					
Have leaders allocated or shifted new or existing resources to support diversity and inclusiveness initiatives?					
Has leadership become accessible to and meet on a regular basis with diverse groups in their area or on campus to listen and learn about their experiences?					
Are women, persons of color, and members of other underrepresented populations in positions of leadership within the unit?					
Do all employees (in particular employees representing diverse groups) receive a strong and regular message that they are valued in the unit?					

<b>IE GOAL 5 – Culture and Climate of Inclusion cont.</b>	<b>Yes</b>	<b>No</b>	<b>In Progress</b>	<b>NA</b>	<b>Evidence of completion (e.g., numbers, documents, programs, etc.)</b>
Do students, staff, faculty, alumni, and members of the public from different backgrounds feel welcome in working, studying, and visiting the unit?					
Does the unit have a Diversity Officer or Committee who is responsible for taking a lead on diversity and holds everyone else accountable for diversity and inclusiveness?					
Is the climate of inclusiveness of the unit welcoming to members of diverse groups?					
Are staff, students, and administrators encouraged to participate in on-campus service by mentoring and supporting individuals from diverse populations?					
Is the relationship between employees positive and respectful?					
Does the unit have a history of excluding members of diverse groups?					
Does the unit promote opportunities for all students and employees to come together as one unit and have significant contact and interaction with each other?					
Does the “hidden” or unofficial culture support diversity in the unit? (You could have an official culture that expresses the value of diversity and simultaneously have an unofficial culture that filled with racist, sexist, and heterosexist jokes, behaviors, and traditions.)					
Are the traditions and celebrations of the unit inclusive?					
Do employees in the unit actively support and attend campus events and celebrate diversity?					
Is your unit multiculturally sensitive when developing printed materials, such as advertisements, flyers, and all on-line material?					
Has the unit conducted a diversity climate assessment or survey?					
Is community service with diverse communities recognized and valued?					
If your unit offers activities/programs, are student activities planned and designed to meet the co-curricular needs of a diverse student population?					
Does artwork, posters, and other visual displays reflect an appreciation for diversity?					

Are individuals from diverse backgrounds with diverse perspectives included in the planning of new projects or initiatives?					
Notes:					
<b>IE GOAL 6 – Inclusive University Policies, Systems, and Infrastructure</b>	<b>Yes</b>	<b>No</b>	<b>In Progress</b>	<b>NA</b>	<b>Evidence of completion (e.g., numbers, documents, programs, etc.)</b>
Is diversity and inclusiveness included in the strategic planning and decision-making process?					
Does the unit adapt the spaces available for students, faculty, or staff with diverse needs?					
Does the budget include financing for diversity projects and initiatives?					
Does the unit develop and distribute to all students, faculty, and staff clearly articulated policies and procedures relevant to diverse student population, (e.g., HIV, AIDS, sexual assault, sexual harassment, bias incidents, nondiscrimination on the basis of race ethnicity, religion, age, sexual orientation, nationality, etc.)?					
When new projects or initiatives are introduced to the unit, is inclusive excellence part of the project and process?					
Does the unit have the organizational structures and procedures for addressing departmental climate issues? (e.g., bias response protocol, education campaign, etc.)					
Are grants pursued in order to finance diversity initiatives?					
Are infringements of the code of conduct viewed as signals for ongoing assessment, dialogue, and intervention with regard to valuing diversity?					
Are diversity initiatives and projects adequately financed? (comparable to other priorities in the unit)					
Have leaders allocated or shifted new or existing resources to support diversity and inclusive excellence initiatives?					
Are offices, spaces, and nearby areas used by the unit physically accessible (both inside and outside)?					
Is the unit plan in alignment with the Inclusive Excellence plan?					



<b>IE GOAL 6 – Inclusive University Policies, Systems, and Infrastructure, cont.</b>	<b>Yes</b>	<b>No</b>	<b>In Progress</b>	<b>NA</b>	<b>Evidence of completion (e.g., numbers, documents, programs, etc.)</b>
Does the unit consider diversity in the membership of committees and taskforces?					
Are employees expected to adhere to the code of conduct?					
Does the student code of conduct clearly prohibit engaging in racist, sexist, biased, sexually harassing, or sexually or physically assaultive behavior?					
Are program/activities offered by the unit physically accessible and provide interpreters for hearing-impaired persons and bilingual translators when appropriate?					
Are there aspects of the inclusive or exclusive history of the unit (positive or negative) that need to be made more transparent or acknowledged?					
Is this checklist or a similar instrument reviewed, discussed, and updated annually within the unit?					
Have leaders allocated or shifted new or existing resources to support diversity and inclusive excellence initiatives?					
Notes:					

**Once you have completed the inventory above, AND discussed it with others from your area, proceed to Phase Two: Analysis.**

## **PHASE TWO: ANALYSIS**

### *How well is your area practicing and implementing Inclusive Excellence?*

Use the questions below to review the inventory you conducted in Phase 1, and to further analyze the “state” of inclusiveness in your unit and what it could be. (In Phase Three, you’ll work on the specifics of **how** to move forward. In this section, your goal is to see **what** needs to be done.)

*When using this document reflect on “diversity.” What does diversity mean for you and your unit? What diverse voices will help your unit to be more representative of the diversity in the community? Reflect on who’s not at the table?*

#### **Our Strengths:**

- Where are our areas of strength? Where is inclusiveness being practiced?
- How can we maintain or enhance those areas?
- How can we celebrate and publicize those successes that have led to greater inclusiveness?

#### **Where Can We Improve?**

- In which areas do we need to improve? (i.e., areas where inclusiveness needs to be embedded)
- Are there some areas that could quickly and effortlessly be changed to be more inclusive? (i.e., “low-hanging fruit”)?
- What resources do we have and/or need to do so?
- Are there some areas that will take longer to change?
- What resources do we have and/or need to do so?
- What areas/items would have the most far-reaching and/or long-lasting impact?

**Once you have completed the inventory above, AND discussed it with others from your area, proceed to Phase Three: Action.**

**PHASE THREE: ACTION**

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

Use the matrix below to lay out a priority and detailed plan for how your area will implement Inclusive Excellence. (See generic example.)

Action Item	Action Step	Who's Responsible	Timeline/Deadline	Priority (ease and/or significance of impact)
<i>EXAMPLE</i> <i>IV.D. Are the traditions and celebrations of the unit inclusive?</i>	<i>Rename annual "Christmas Party" to "Holiday Party," explicitly acknowledging multiple celebrations at that time of year.</i>	<i>"Office Social Team," the volunteer committee members who have historically organized holiday and birthday observances for the unit.</i>	<i>For this fall/winter's holiday season.</i>	<i>High (relatively simple to do!)</i>

## **Glossary:**

*This is a companion of terms for the **Inclusive Excellence Toolkit** to help clarify some of the terminologies and wording contained in the document. Please contact the Office of Inclusive Excellence with any questions you might have.*

*Please note, the terms “diversity” and “diverse” are used throughout the **Inclusive Excellence Toolkit**. Our definition of diversity recognizes the full gamut/broad spectrum of experiences and unique differences of all members of our community. We celebrate diversity in all of its dimensions as we endeavor to create and sustain an inclusive campus environment.*

**Affinity Group:** An association of faculty and or staff that come together to give a voice to underserved populations. These participants are usually a member of the community or an ally of the community.

**Beneficence Pledge:** The Ball State Beneficence Pledge is an adopted code of conduct for all Ball State University members that lay out the basic ideals the Beneficence represents. Find the pledge here: <https://www.bsu.edu/about/administrativeoffices/student-conduct/policiesandprocedures/beneficence>

**Bias Incident Reporting:** The procedure implemented whenever a bias incident is perceived to have occurred. For more information visit: <https://www.bsu.edu/campuslife/multicultural-center/bias-incident-reporting>

**Disabilities:** This refers to a physical or mental condition that limits a person's movements, senses, or activities.

**Diversity:** The condition of having or being composed of differing elements: variety; different types of people.

**Field-Specific Barriers:** These are things that will stop students of diverse cultures from succeeding either academically or professionally when it comes to their major or area of intended work.

**In-house trainings:** These can either be trainings specific to your area or unit or trainings offered by Ball State University.

**Inclusion:** the action or state of including or of being included within a group or structure.

**Inclusive Excellence:** This means that an institution has adopted a cohesive, collaborative, and comprehensive approach to diversity and inclusion. This allows everyone to have the same voice as any other person during the discussion. It employs a broad definition of diversity that includes dis/ability, gender identity, gender expression, sexual orientation, race/ethnicity, religion, nationality, age and other important social dimensions that are part of a community.

**International:** Students, faculty, or staff that are not native born to the United States or its protectorates.

**Latinx:** The gender-inclusive language to refer to people from Latin American decent, instead of specifically stating Latino or Latina, this includes both genders and any non-binary individuals.

**LGBTQ:** Stands for Lesbian, Gay, Bisexual, Transgender, and either Queer or Questioning. This is an acronym for sexual and gender minorities that is an umbrella term. Another version of this phrase is GSRM or Gender, Sexuality, and Romantic Minorities.

**Microaggressions:** A term used for brief and commonplace daily verbal, behavioral, or environmental indignities, whether intentional or unintentional, that communicate hostile, derogatory, or negative prejudicial slights and insults toward any group, particularly culturally marginalized groups.

**Multicultural Competencies:** obtaining the awareness, knowledge, and skills to work with people of diverse backgrounds in an effective manner.

**Multiculturally Sensitive:** Understanding the issues that can arise from being a member of a minoritized community and take that into account when teaching and or working.

**Retention:** The process to keep those students, faculty, and staff that you have.

**Rewards and Recognition:** Recognize and celebrate the contributions of those who work toward the goals of Inclusive Excellence. This can just be through small comments or through an actual recognition event.

**Student Learning Outcomes:** Clearly state the expected knowledge, skills, attitudes, competencies, and habits of mind that students are expected to acquire from an educational experience. For more information on this visit: <https://www.bsu.edu/about/administrativeoffices/vice-provost/administrative-services/student-learning-outcomes>

**Students of color:** This includes anyone who is not Caucasian. Other phrases include POC, People of Color and BIPOC or Black, Indigenous, and People of Color.

**Unit:** The division, department, or school that you are a part of.

## FAQ:

**Not every question applies to us what do we do?** This is a general toolkit for multiple areas so if the questions do not apply to you, just select NA.

**We are a small department and can't always do some of the items what do we do?** You are allowed to utilize opportunities available elsewhere on campus, such as outside trainings or the University Diversity Office.

**How do we do a climate survey in our area and keep it confidential?** You can utilize the campus wide campus climate survey and look at the results from your general area (expected to be debuted Spring 2021).

**We do not have a "history" per se, what can we do about this?** This is for areas that have named rooms or collections and may not be applicable to your area.

**What if we aren't an area that works with students in person?** You can either skip these questions or you can try to adjust them to fit the area you deal with specifically.

**We are a small department and don't have someone who is defined as being an advocate for diverse persons, what can we do?** The Office of Inclusive Excellence will be offering an opportunity for employees to be trained as Inclusive Excellence Champions, and this person could be used as this person. Please also note that the Office of Inclusive Excellence serves the Ball State campus and can serve and support you in this area, as well.

**How can we embed inclusive excellence in our project evaluation process?** Make sure that what you're planning is accessible to a diverse population. Questions to consider are: Is there any group that this presentation might make uncomfortable? Are there inclusive voices at the table during the planning and implementation stages? Do we use inclusive language in our program? Have we considered access needs for members of our community who are disabled?

Treviño, J.; Walker, T.; Leyba, J. (2009). Inclusive Excellence Toolkit. Retrieved from <https://www.du.edu/gsg/media/documents/InclusiveExcellenceToolkit-DUCME3-09.pdf>