STAY THE COURSE:
Developing a More Cohesive and Integrated Approach to Advancing Diversity, Equity, and Inclusion at CSUSM

CALIFORNIA STATE UNIVERSITY SAN MARCOS INCLUSIVE EXCELLENCE INITIATIVE

EXECUTIVE SUMMARY

Damon A. Williams, PhD
Raedy Ping, PhD
Katie Schwartz, PhD
Sallye McKee, PhD
Deiadra Gardner, BA
Daria Astara, BA

Center for Strategic Diversity Leadership & Social Innovation

DrDamonAWilliams.com

EXECUTIVE SUMMARY

In May of 2022, for the *CSU San Marcos Inclusive Excellence Initiative,* university leadership selected Dr. Damon A. Williams and the Center for Strategic Diversity Leadership and Social Innovation (CSDLSI) of Atlanta, Georgia, as its partner. This project engaged students, faculty, and staff in the process while it gathered critical institutional data to inform the development of a cohesive and integrated approach to advancing issues of diversity, equity, and inclusion (DEI) at CSUSM. The research included three primary approaches (Exhibit ES.1.). Further, this initiative built upon prior assessments conducted by both internal and external review teams to provide deeper insights and to establish a clear set of strategic recommendations to focus and support the university's efficacy moving forward.

Staying the Course towards Inclusive Excellence

The assessment presented in the full *Stay the Course: Developing a More Cohesive and Integrated Approach to Advancing Diversity, Equity, and Inclusion at CSUSM* executive report identifies a generally positive pattern of findings. It is clear that CSUSM has established a strong DEI commitment, general processes, and direction. You have begun to explore the important work of integrating an antiracism approach into your Inclusive Excellence efforts as well. Yet, progress in advancing both DEI and antiracism work has felt slow, and in some ways the path forward has been difficult.

While still a relatively young institution, CSUSM has built an unusually strong commitment to advancing Inclusive Excellence as a top institutional priority. This foundation is defined by staunch presidential leadership, prior DEI plans, and the formalization of DEI infrastructure. Foundational DEI approaches have precipitated a general education diversity requirement, an outstanding faculty cluster hiring initiative, many campus cultural centers, a faculty senate resolution to prioritize DEI in faculty advancement and tenure, and even more important steps.

Considering that CSUSM is headed in a good direction and has made notable progress, a few tapered challenge areas require a thoughtful and more structured strategy going forward. By all means "stay the course" while at the same time deepening and formalizing your current foundations to allow continued, and even accelerated growth. Most acute is the immediate need to build a shared system of DEI planning, implementation, and accountability across administrative and academic units, one that echoes, feeds into, and locally operationalizes a broader campus-wide strategic plan. Then, by anchoring this plan upon a number of visible, strategic "big bets," you can garner enthusiasm and inspire organizational change.

Exhibit ES.1. CSUSM Inclusive Excellence Initiative research components

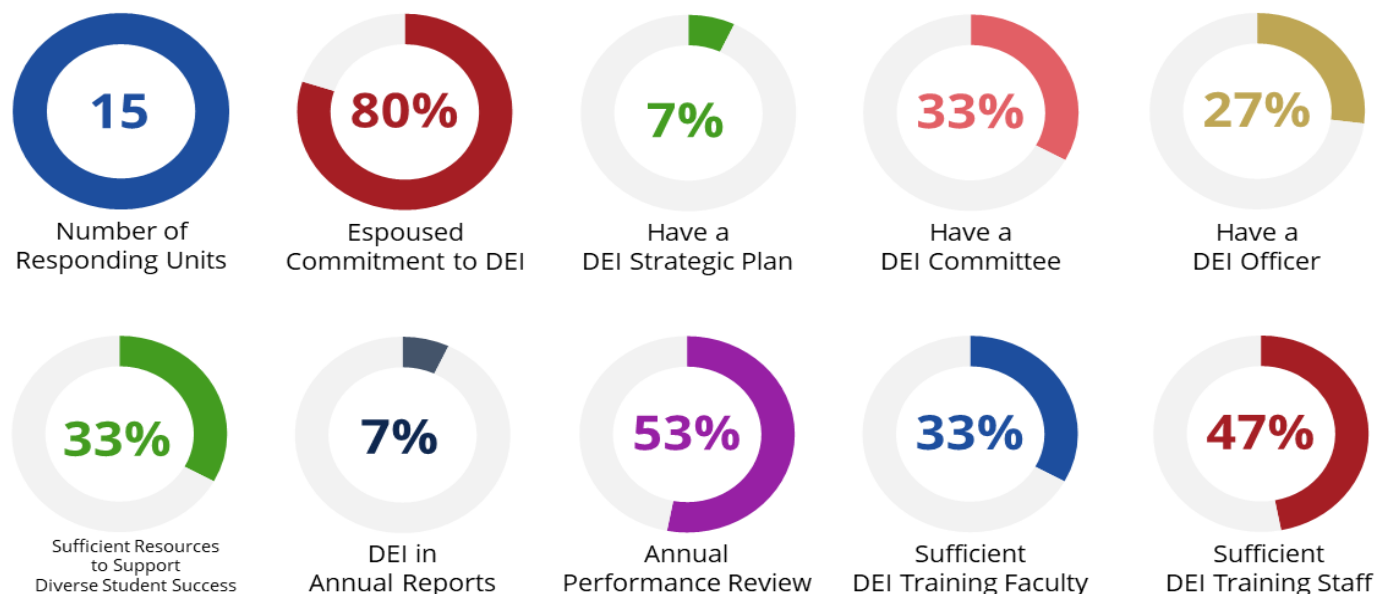| Approach	Description	Research Inquiry
Strategic DEI Inventory: DEI Strategy and Structure (Section 1)	An online survey submitted to every administrative and academic unit of the college.	Does CSUSM have in place the formal, best-practice, organizational structures, and strategies to ensure DEI success?
Strategic DEI Inventory: DEI Initiatives, Programming, and Capacity (Sections 2 & 3)	An online survey submitted to every administrative and academic unit of the college.	What DEI capacity does CSUSM offer in its current initiatives and offerings? Where can it go from here?
Dialogue Sessions and Interviews (Section 4)	Qualitative data collected from individual and group dialogues, including an online survey.	What is going well at CSUSM in terms of DEI? Where are the challenges? What suggestions can you make for CSUSM ?

(1) The CSUSM Strategic Diversity Leadership Inventory: DEI Strategy and Structure

DEI organizational change efforts are most successful with plenty of AIIR—Accountability, Infrastructure, Integration, and Resources—especially when operationalized at a local level. This segment of our review explored the state of Strategic Diversity Leadership and DEI infrastructure. We asked leaders of the 15 academic and administrative units about the AIIR elements in their units across five key dimensions that we have found create the necessary backbone to empower a meaningful DEI change effort (Exhibit ES.2).

(1) *Espoused Commitment to DEI:* Expressions of DEI commitment are part of the symbolic energy that shapes what matters on campus. This 80% finding is strong and well dispersed across campus.

(2) *DEI Strategy and Accountability:* A common challenge at many institutions, including CSUSM, is the need for clarity in translating a strong central intent and commitment to DEI into an activation strategy deployed at the local institutional level. Two key opportunities include (1) Creating a dedicated DEI strategic plan in most of the responding units (7% have one) and (2) Building unit-based accountability systems, specifically annual DEI reporting processes (7% produce annual reports) to guide the overall effort. A shared plan and annual reporting are crucial building blocks that show students, faculty, and staff that the university is acting on its commitments.

(3) *DEI Infrastructure and Training:* Committees, officers, and DEI learning/training for employees provide the primary leadership, coordination, and capacity-building efforts to help bring DEI to life, beyond specific programs. We noted the beginnings of infrastructure development within individual units and encourage you to "stay the course" and continue to build and strengthen.

(4) *Integration of DEI into General University Processes and Systems:* Part of the AIIR theory of change is that DEI should be implemented into the everyday processes and decisions of the university. Our program inventory analysis revealed several positive findings at CSUSM.

(5) *DEI Resource Allocations:* A key expression of an institution's priorities is how leaders allocate precious financial resources. Funding challenges regularly popped up in listening sessions, triangulating with our strategic review findings. In sum, most of the 15 units do not feel that they have adequate financial resources to support diverse students (67%), staff (63%), or faculty (53%) success. At the same time, innovative programs do exist across CSUSM. A key recommendation here is to focus on innovation grants and identify promising programs for scaling or modeling.

Overall CSUSM's figures moderately lagged our national database average of all schools with which we have worked—except in your strengths of DEI commitment, faculty resources, and individual accountability. A few low-hanging-fruit opportunities could quickly raise some of these results toward national averages. A "stay the course" strategy for CSUSM would focus on such items while continuing to formalize, develop, and strengthen the above five foundational elements of Strategic Diversity Leadership. A maturation-level goal would be to bring these factors up to 75% operationalized in reporting units and, ultimately, to 100%.

Exhibit ES.2. CSUSM Strategic DEI Leadership Scorecard Overview for Responding Units

15	80%	7%	33%	27%
Number of Responding Units	Espoused Commitment to DEI	Have a DEI Strategic Plan	Have a DEI Committee	Have a DEI Officer

33%	7%	53%	33%	47%
Sufficient Resources to Support Diverse Student Success	DEI in Annual Reports	Annual Performance Review	Sufficient DEI Training Faculty	Sufficient DEI Training Staff

Source: CSUSM DEI Inventory Survey Responses, September-October 2022.

(2) The CSUSM Strategic Diversity Capacity Inventory:
DEI Initiatives, Programming, and Capacity—Qualities

Gaining insights into the DEI programming mix across campus is a crucial step to coordinating, improving, and making visible the college's varied investments in such work as part of a "stay the course" strategy. Our strategic capacity work catalogued and analyzed DEI offices, units, initiatives, courses, research projects, training programs, events, practices, and programs designed to advance diversity issues broadly defined. We documented 571 existing campus DEI initiatives, and know even more likely exist. Each initiative was analyzed for: (1) Identification and demographics serviced; (2) Diversity foci; (3) DEI-focused or -integrated; (4) Evidence basis; (5) Six functional categories, and (6) Program types.

The CSUSM initiatives collected in this inventory tended to focus on students as well as staff and faculty in a good balance. A full 57% of programs were categorized as DEI-Intensive, focusing on an aspect of DEI, such as a speaker for Black History Month; roughly 43% were DEI-Integrated, where DEI goals are built into the fabric of general campus program, a solid ratio supported by strong submissions. More than half were evidence-based and nearly half assessed their impact, two best practices we further encourage.

(3) The CSUSM Strategic Diversity Capacity Inventory:
DEI Initiatives, Programming, and Capacity—Categories and Types

Our strategic diversity leadership capacity framework was used to map today's CSUSM DEI programs by function (Williams, 2013). In this way we quantified the types of efforts the university has put into place to bring life to its institutional DEI commitment. This approach identified meaningful patterns in the data that helped generate a more fine-tuned discussion of campus initiatives and trends. The six main categories were:

(1) DEI General Infrastructure (DEIGI)
(2) Recruitment, Retention and Outreach (RRO)
(3) Affirming Diverse Identities & Community Building (ADICB)
(4) DEI Training, Campus Climate Research, and Policy Development (TCCRP)
(5) Preparing Students for a Diverse and Global World (DGW)
(6) Multicultural & International Research and Scholarship (MIRS)

This analysis helps us move from seeing these activities as discrete events and programs into bundled DEI *capabilities.* We can also infer that, when these capabilities become more coordinated, it is more likely to drive greater impact and outcomes.

The university's strong commitment to DEI was clearly embodied in the innovative initiatives we identified and the admirable integration of DEI across many functions. Along the way, we noted several programming gems, which can be further developed and/or scaled across campus. With this analysis in hand, the university can now clearly determine how to strengthen, deepen, and expand its capacity as it stays the course.

(4) CSUSM Listening and Dialogue Session Findings

Listening and dialogue sessions are designed to encourage participation by the CSUSM community and allow us to dig qualitatively into session participants' reported day-to-day experiences regarding DEI. All told, 46 focused, unrecorded dialogue sessions were facilitated by CSDLSI via Zoom, welcoming over 300 CSUSM participants. Each session centered on three research questions: (1) What is going well, (2) What challenges do you see, and (3) What recommendations would you offer to improve DEI at CSUSM? Additional input was accepted via an online survey.

More than 450 contributions were collected and organized into five positive themes and ten challenge areas, providing background and depth for our quantitative research. It is important to note that these themes reflect the summative perspectives of participants and should be understood more as areas for further exploration than as definitive findings. Recognizing that leadership never faces an absence of dissent, the

five main challenges noted included: (1) DEI efforts seem performative; (2) Desire for broader, more inclusive DEI definitions; (3) Faculty and staff recruitment and retention issues; (4) Call for deeper cross-cultural skills and training; and (5) More resources for cultural centers. Additional challenge themes reflected experiences of microaggressions in the campus community. These themes and others are detailed in the final report.

On the positive side of these personal reflections, we encountered a broad and deep impression that there is a campus-wide desire for engagement in DEI, reflecting the oft-mentioned high level of espoused DEI commitment at CSUSM and how well we also saw DEI efforts integrated across institutional programming. Other key positives included the highly praised CDO and Office of Inclusive Excellence, the growth of DEI programming and resources, the creation of key meeting spaces and cultural centers, and the DREAMer Resource Office as particularly outstanding.

(5) Ten Recommended Strategic Diversity Leadership Action Steps to Spark Change

Ten primary foci of potential improvement emerged from our data and thematic analysis (Exhibit ES.3). Based on proven DEI best practices, these steps are offered as a way for CSUSM to improve its outcomes, campus climate, and more. They reflect our research findings as well as the commitments already made by leadership. (Additional minor recommendations were sprinkled throughout the report as we discussed data.)

To establish a future vision for campus, one of the first questions to resolve early in the planning process is how to engage Inclusive Excellence, DEI, and antiracism in your strategic direction given that they each vary (though overlap) in perspective, core focus, and organizational change methodology. Your current strategic direction and capabilities evidence movements within the Inclusive Excellence tradition that can be further strengthened by this report and its recommendations. Antiracism and Inclusive Excellence are different, yet related, organizational approaches. Antiracism brings in dialogue about past wrongdoing, acknowledging both current and past symbolism, and working through current and intergenerational pain and trauma while focusing on achieving equitable outcomes. While the Inclusive Excellence change model does not center on truth, reconciliation, and healing, it does focus on achieving high-impact racial equity outcomes, squarely overlapping with the antiracism organizational change methodology. From this vantage, racial equity is associated with *both* paradigms, while the DEI change model looks to many other aspects of equity, not singularly race. Your planning committees should grapple with these dynamics and create a statement regarding these factors as they articulate your new DEI strategic plan, a point that we elucidate in our first recommendation (Exhibit ES.3).

Today California State University San Marcos stands at an opportunity point. With a strong and recognized commitment to DEI, the university is poised to continue formalizing that commitment in both word and deed, staying the course and enhancing the university's overall excellence. Accomplishing these ten action steps should powerfully advance the university in both immediate and long-term ways, galvanizing its mission to serve a diverse community of students and employees in the San Marcos area and beyond.

Final Thoughts and Next Steps

Presented to President Ellen J. Neufeldt and Chief Diversity Officer Aswad Allen as a way of strengthening the diversity, equity, and inclusion work at CSUSM, this report provides a detailed analysis of current DEI capacity and infrastructure as well as a roadmap of key steps CSUSM can take moving forward. While every unit has a different mission, they each must play a role in building DEI activation at CSUSM and in leading systemic and organizational change. Such changes will enhance the institution's ability to recruit *and retain* top student and employee talent. They will help leverage the differences and enhancements that diverse individuals bring to overall institutional excellence. We are excited for CSUSM to stay the course while deepening and strengthening its work at a more strategic, intentional level.

From all of us at the Center for Strategic Diversity Leadership and Social Innovation, thank you for the opportunity to serve your intentions and efforts. We are proud to be a friend to your work and look forward to your next steps.

Exhibit ES.3. Summary of recommended action steps for CSUSM

Recommendation	Description
1. Develop CSUSM's Position Around Inclusive Excellence, DEI, and Antiracism	• Develop a statement on Inclusive Excellence, DEI, and potentially antiracism and clarify your core organizational change methodologies as part of a new strategic plan. • If antiracism will be a focus, look for opportunities to scale up dialogue and reconciliation initiatives on campus, making intergroup dialogue a part of formal DEI learning curriculum and training programs. • Focus on racial equity as a part of a DEI and/or antiracism strategy.
2. Develop a Campus-wide DEI Action Plan and Alignment Strategy	• Develop a comprehensive and aligned DEI strategy, accountability, infrastructure, and implementation framework to guide DEI activation. • Develop a comprehensive five-year DEI/antiracism strategic plan and activation strategy. • Establish a multidimensional DEI college-wide scorecard to set goals and track progress • Build out lateral DEI infrastructure. • Require every unit to create a DEI plan. • Establish annual DEI strategic update reports developed and published by every unit. • Establish shared accountability systems.
3. Strengthen Local DEI Plans	• Develop a local DEI implementation infrastructure per unit and an aligned DEI strategic plan • Establish 15 DEI committees and leaders, one in each academic and administrative unit. • Establish a DEI lead role in every unit that has a dedicated DEI plan. • Establish a DEI Planning and Implementation Committee. • Align pre-existing DEI unit, programs, and initiatives with the new DEI strategic plan.
4. Embolden DEI Leadership Accountability	• Embolden DEI leadership and accountability as a core institutional value and expectation for all community members. • Embed DEI leadership and engagement as a requirement of all leadership, faculty and contractual roles. • Make DEI leadership a part of the hiring rubric for all jobs on campus. • Embed DEI into all performance reviews, merit considerations, and promotions. • Develop a campus DEI exchange effort • Consider asking board members to participate in a strategic DEI training experience.
5. Enhance the Campus-wide DEI Infrastructure	• Create dotted-line relationships to the 15 DEI planning units/committees across campus. • Invest in training of the DEI activation leads.

6. Enhance DEI fundraising and create an IE Innovation and Partnership Fund	• Continue to strengthen campus DEI fundraising, looking to create enhanced capacity through clear goals, dedicated leadership, affinity structures, and alignment to the campus DEI plan.
	• Also develop an Inclusive Excellence Innovation fund that would create grants that support:
	   o Small, one-time efforts for faculty/staff/students at $1500 or less.
	   o Larger campus partnerships and collaborations that fund efforts at $20K/year for 2- to 3-year commitments, requiring matching gifts to secure the funding.

7. Institutionalize DEI Training Certification	• Institutionalize the college's commitment to DEI training and professional development with a required DEI certification initiative. • Develop comprehensive DEI certificate programs for students, faculty, and staff. • Focus on race and gender issues.
8. Continue Building Diversity in Leadership and Faculty	• Establish a systematic approach to increasing diversity among leadership and faculty with best practices in hiring and retention. Develop DEI hiring and retention goals/rubrics. • Require every DEI committee to engage in search-and-screen training. • Require every search committee to create a search and screen plan with a focus on DEI aspects. • Require search committees to search until their interview slate is "diverse" according to the institution's definition of diverse for this purpose of hiring.
9. Improve the Lived Experience of Dissatisfied Communities	• As part of the DEI strategic plan, develop a specific set of strategies to enhance the lived experience of the diverse groups on campus that expressed challenges. • Strengthen affinity groups on campus and tap them for the following leadership program • Create a CSUSM's Leaders: Career Advancement Program.
10. Embed DEI and Allyship in Learning and Student Development	• Embed DEI and allyship as core pillars of learning and student development. • Consider ways to embed DEI learning and allyship in learning and student development. • Embed DEI and antiracism in the core curriculum. • Embed DEI and principles of allyship into all discussions of student leadership on campus, while creating new initiatives that focus on DEI..
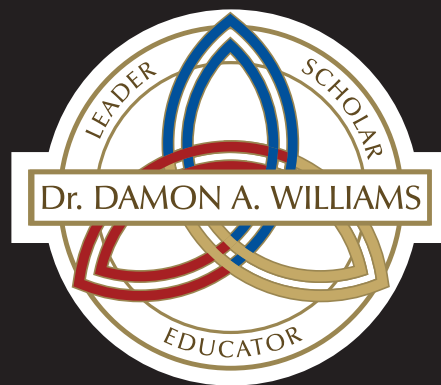
For more information contact:
CENTER FOR STRATEGIC DIVERSITY LEADERSHIP & SOCIAL INNOVATION

1-833-CDO-HELP

4780 Ashford Dunwoody Road,
PMB 540 NO 130, Atlanta, GA 30338

Info@DrDamonAWilliams.com