

**BEYOND PLAN 2008:  
NEXT STEPS IN THE UW SYSTEM'S WORK ON  
EQUITY, DIVERSITY, AND INCLUSION**

**EXECUTIVE SUMMARY**

**BACKGROUND**

In early 2009, the State of Wisconsin stands on the threshold of significant demographic change and economic uncertainty. Wisconsin's population is shrinking, as is the state's pool of high school graduates. As the UW System considers how best to educate students and deploy its human and financial resources to serve the state and prepare citizens for the 21<sup>st</sup> century global society, it must take this evolving context into account.

The *Growth Agenda for Wisconsin* seeks to do exactly that, with its focus on people, jobs, and communities, and its plan to improve Wisconsin's competitive edge, nationally and globally. Developed with broad input from constituents throughout the state, the *Growth Agenda* offers a blueprint for developing the state's human potential, creating new jobs, and strengthening the local communities that sustain citizens and businesses alike. With reinvestment from the state, the University of Wisconsin System seeks to: 1) enroll more Wisconsin residents and graduate more four-year college-degree holders; 2) attract college graduates from other states to Wisconsin; and 3) use university resources to grow knowledge-economy jobs for Wisconsin's future. The ultimate goal is an economically robust Wisconsin, with a high quality of life, an engaged citizenry, and a strong democracy.

Wisconsin's shifting demographics present both challenges and opportunities to enacting the *Growth Agenda*. The *Growth Agenda* seeks to increase the number of baccalaureate degree-holders in Wisconsin at a time when the state's projected number of high school graduates is going down, having peaked in 2008. According to the UW Applied Population Laboratory, projections indicate that the number of graduates will decline steadily until 2015 (by about 8.9 %, or 6,121 graduates statewide), and then begin to increase again. This decline is true for every race and ethnicity with the exception of Hispanic/Latinos, for whom dramatic growth is expected. The number of Hispanic/Latino public school graduates is projected to nearly triple between 2006 and 2019. So while the number of white high school graduates is going down, the number of public school graduates of color is growing statewide. Between 2001 and 2006, the percent of Wisconsin high school graduates of color increased from 11% to 15%. Such increases are expected to continue: the projections for this group are that this percentage may increase to 18% in 2012, and to 22% in 2019.<sup>1</sup>

These demographic projections have enormous implications for how the UW System will serve the state's citizens as they seek access to post-secondary opportunities, and for how the System will create welcoming environments that address the needs of high school graduates of

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<sup>1</sup> The population data and projections are taken from the March 2008 report, *Wisconsin High School Graduate Projections: 2008-2019*, prepared by the UW-Madison Applied Population Laboratory for the UW System. For the full report, go to: [http://www.apl.wisc.edu/publications/apl\\_grad\\_projections2008.pdf](http://www.apl.wisc.edu/publications/apl_grad_projections2008.pdf).

color as they enter its institutions. Despite having one of the highest public school graduation rates in the nation, Wisconsin has relatively low graduation rates for students of color—below the national average—in particular for African American students. This statistical backdrop has informed and impacted the System’s ten-year effort to address educational quality through racial and ethnic diversity in its *Plan 2008*.

At its March 2009 meeting, the Board of Regents will devote the afternoon to a policy discussion of the next steps in the UW System’s work on equity, diversity, and inclusion, a discussion that has everything to do with Wisconsin’s shifting demographic, economic, and social contexts. The Board will consider the final report and evaluation of *Plan 2008* (comprising the years 1998-2008), which highlights both the progress that has been made, and the challenges that remain for the years beyond 2008. The Board will consider the set of recommendations made in the final report, hear a presentation on several intermediate strategies taken by the UW System and its institutions to advance diversity prior to the endpoint of *Plan 2008*, and begin a discussion of *Inclusive Excellence*, the umbrella framework under which the UW System and its institutions will move forward in coming years to strategically address diversity, equity, and inclusion.

## **REQUESTED ACTION**

No action requested; for information only.

## **DISCUSSION**

### **Final *Plan 2008* Report**

The final *Plan 2008* report contains summary data from the entire period of time the Plan was in effect, 1998 through 2008. It includes examples of practices and programs implemented to advance the goals of *Plan 2008* at the system and the institutional levels. The report assesses the extent to which the UW System has met the Plan’s seven goals, identifies those goals that remain to be incorporated into future strategic actions for equity and educational excellence, and sets the stage for Inclusive Excellence.

This final *Plan 2008* Report delivers an assessment of the progress the UW System has made in its efforts to enhance educational excellence and diversity through expanded access and opportunity for students and faculty of color, and for economically disadvantaged students. The Report’s key findings cover the areas of enrollment, retention, bachelor’s degrees conferred, financial aid, and accountability. As the key findings delineate, the UW System has made some progress on the goals of *Plan 2008*, but not to the extent hoped for. Some of the major challenges to progress continue to be systemic in nature, and, therefore, strategies to address them require the attention and leadership of many educational sectors (elementary, secondary, and post-secondary), and across all levels of the UW System (including the Board of Regents, UW System Administration, and all UW Chancellors, Provosts, faculty, and staff).

The data contained in the final *Plan 2008* Report provide a critical opportunity for the UW System to reflect on its progress to date, to confront what has worked and what has not

worked, and to identify areas where additional attention must be paid. Further, the Report provides baseline data the UW System can use to define its future strategic actions to: 1) achieve equity in educational outcomes for students; 2) build and strengthen the precollege pipeline; 3) achieve student and workforce diversity; 4) create inclusive and welcoming climates for all; and 5) strengthen assessment and accountability with improved measures and performance.

Finally, the final *Plan 2008* Report includes a set of recommendations that are prerequisites for any high-impact initiatives in which UW institutions will engage as they work to make excellence inclusive. They include:

- UW System and institutional resources need to follow the stated priorities of diversity, equity, and inclusion.
- UW System and the institutions must develop concrete, well-defined actions to achieve workforce diversity.
- UW System and the institutions must develop concrete, well-defined actions to achieve a critical mass of underrepresented students.
- UW System and the institutions must engage in assessment that focuses on outputs/outcomes rather than inputs, building a culture of evidence in which data informs policy and practice.
- UW System and the institutions need to retain intentional, focused efforts on strategies and practices that close gaps in achievement, and ensure opportunity and excellence.
- UW System must practice active, engaged, and sustained leadership to advance the organizational change efforts resulting in equity, diversity and inclusion.
- UW System and the institutions must support well defined, broadly communicated, and clearly understood systems of incentives and rewards.

### **Intermediate Strategies to Address Diversity and Equity**

In the last few years, as *Plan 2008* moved to the end of its decade-long tenure, the UW System developed several intermediate strategies as UW System Administration (UWSA) and the institutions confronted what was mixed progress on the Plan's goals and a growing understanding of what was and was not working. Three of these strategies were the Equity Scorecard Project, the Campus Climate Study, and the Transfer Equity Study.

To focus efforts on eliminating unequal outcomes in education and closing gaps in achievement, two cohorts of UW institutions are participating in the **Equity Scorecard Project**. Developed by Dr. Estela Bensimon of the Center for Urban Education at the University of Southern California, the Scorecard is a self-assessment process designed to improve institutional performance and accountability for achieving equity in educational outcomes for all students, particularly for underrepresented populations of students of color. In adopting the Scorecard, the UW System was also responding to a directive from the Board of Regents. In February 2005, the Board of Regents issued Resolution 8970, which not only reaffirmed the Board's compelling interest in and commitment to achieving educational diversity at all UW System institutions, but also directed UWSA and the institutions to adopt a diversity accountability report card with

measurable goals that would track the progress made in closing the achievement gap between UW students of color and white students.

The Equity Scorecard process enables UW institutions to do just that by identifying unequal results in key areas related to institutional performance and educational outcomes for student success. Using student data disaggregated by race and ethnicity, campus teams engage in a systematic process of practitioner inquiry to help them understand and pinpoint the underlying causes of student inequities in order to develop effective solutions that will eliminate the inequities.

The first Equity Scorecard cohort began its work in 2006 and includes six UW institutions: the UW Colleges, UW-La Crosse, UW-Oshkosh, UW-Milwaukee, UW-Parkside, and UW-Whitewater. Beginning in 2008, five additional UW institutions became a part of the second cohort: UW-Eau Claire, UW-Platteville, UW-River Falls, UW-Stout, and UW-Superior. Through the analytical framework of the Equity Scorecard, these UW campuses have made significant progress in identifying root causes of problems, and are now developing strategies to remedy them.<sup>2</sup>

The **Campus Climate Study Project** was undertaken as a result of a growing awareness at several UW institutions and System Administration of bias-related incidents at UW institutions. This awareness led to the UW System's decision to undertake a broad-based, systemwide climate study that would provide data for institutions and the System. The firm Rankin & Associates was chosen to lead the project because of their nationally recognized reputation for conducting multiple-identity climate surveys in higher education.

In Fall 2006, five UW institutions volunteered to participate in the pilot year of the Climate Study, including the UW Colleges, UW-Oshkosh, UW-La Crosse, UW-Milwaukee, and UW-Stevens Point. Given in paper form and online, the survey measured climate via perceptions and experiences of campus community members, including faculty, staff, and students. Each participating campus's climate of diversity and inclusiveness was assessed with regard to multiple identity groups (e.g. race/ethnicity, gender, sexual orientation, religious affiliation, veteran status, etc.). An overview of the Climate Study, including results, was presented to the Board of Regents at their December 2008 meeting.<sup>3</sup>

The conclusions of the Climate Survey are meant to aid each institution in developing tailored action plans for inclusion and diversity that will assist in focusing their efforts to make their campus inclusive and welcoming for all. UW-Eau Claire, UW-Parkside, UW-River Falls, and UW-Whitewater are participating in the second round of the survey.

Just getting underway is the **Wisconsin Transfer Equity Study**. This two-year project, focused on the UW System, is being led by Dr. Bensimon, developer of the Equity Scorecard,

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<sup>2</sup> Additional information on the Equity Scorecard, including interim reports on institutional findings can be found at: <http://www.uwsa.edu/edi/equity/index.htm>.

<sup>3</sup> To view the presentation made to the Board, go to: <http://www.wisconsin.edu/news/2008/12-2008/CampusClimate.pdf>. The written report can be found on pages 3-8 of the Regent materials from December 2008 at: <http://www.uwsa.edu/bor/agenda/2008/december.pdf>.

and her Center for Urban Education at the University of Southern California. Funded by a two-year grant from the Ford Foundation, the project will work to increase under-represented students' access to, and transfer from the UW Colleges two-year campuses and Wisconsin Technical College institutions. The work will build on the findings from the Equity Scorecard institutions, and will establish specific benchmarks to assess progress toward equity in transfer practices and successful transfer outcomes at all levels.

### **Inclusive Excellence**

The UW System's *Growth Agenda for Wisconsin* recognizes that higher education plays a significant role in providing students with the knowledge, skills, and habits of mind they need to succeed in the 21st-century global economy. The UW System must prepare its students for responsible, ethical, and engaged citizenship to meet the university's broad educational goal of promoting excellence in professional, civic, and personal life. To succeed in the 21st century, students need certain knowledge, skills, and multicultural perspectives – including the ability to empathically put themselves in another's shoes.

One of the *Growth Agenda's* action steps is to “model inclusive excellence in UW System education and employment.” Inclusive Excellence is the umbrella framework under which the UW System and its institutions will move forward in coming years to strategically address equity, diversity, and inclusion as the successor to *Plan 2008*. It is not another plan with a pre-determined time frame for implementation; nor does it abandon the goals of *Plan 2008*. Establishing a critical mass of faculty, staff, and students from historically underrepresented groups will remain a top priority for the UW System and its institutions under Inclusive Excellence. The central premise of Inclusive Excellence holds that UW System colleges and universities need to intentionally integrate their diversity efforts into the core aspects of their institutions—including academic priorities, leadership, quality improvement initiatives, decision-making, day-to-day operations, and organizational cultures—in order to maximize their success.

Inclusive Excellence is designed to help UW institutions establish a set of comprehensive, well-coordinated strategic actions that foster greater diversity, equity, inclusion, and accountability at every level of institutional life. Inclusive Excellence builds on both the Equity Scorecard and the Campus Climate projects in their efforts to foster positive institutional change, and their insistence that diversity is an integral part of academic and institutional excellence. This approach is based on a model developed by higher education researchers and practitioners working with the Association of American Colleges and Universities (AACU), the UW System's partner on the LEAP Campaign (*Liberal Education and America's Promise*).

### **Key Policy Issues for Discussion**

On the threshold between the conclusion of *Plan 2008* and the movement towards Inclusive Excellence, the UW System has a number of policy questions to consider:

1. What worked, what did not work, and what are the most important lessons learned from *Plan 2008*?

2. Where should the UW System expend its energies and resources in the years to come?
3. What type of leadership is required and expected from Chancellors/Institutions and the UW System Administration?

As the umbrella framework for the UW System's diversity work in the years to come—and like the *Growth Agenda*—Inclusive Excellence sets out to prove that higher education systems and institutions can act as catalysts for transformation, transformation that is at once educational, social, civic, and economic. And, like the *Growth Agenda*, Inclusive Excellence holds at its core the goal of a vibrant Wisconsin, determined to carry the UW System forward into the multicultural democracy that exemplifies 21<sup>st</sup>-century America.

### **RELATED REGENT POLICIES**

*Plan 2008: Educational Quality Through Racial and Ethnic Diversity; A Report to the Board of Regents, May 1998.*

*Plan 2008 Phase I Report - Report on Diversity: A Wisconsin Commitment, An American Imperative, April 2004.*

*Plan 2008: Reflections on the Past, Prospects for the Future, June 2007*

Regent Resolution 7692, adopted 5/8/98.

Regent Resolution 8850, adopted 6/10/04.

Regent Resolution 8970, adopted 2/11/05.