University Advising

DIVERSITY ACTION PLAN

2021-2025
**Our commitments toward building a more inclusive and just Cal Poly:**

University Advising has embarked on an exciting journey to build on and expand our long-standing commitment to diversity and ensure that every member of the Cal Poly community feels safe and empowered through their relationships with staff and by-way of engagement with inclusive advising, transfer support, and retention programming. Inspired by a strong base of relationships and programs developed through the years, our staff has enacted a formalized system to embed cross-cultural sensitivity and a clear, unequivocal regard for all students into the very fabric of our unit. This commitment is strongly aligned with Cal Poly’s University Strategic Plan Priority 3 to “Enrich the campus culture of diversity, equity, and inclusion” as well as recommendations developed by the 2018 Collective Impact Strategy Group.

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We, collectively, and individually, are committed to the goals contained in this Diversity Action Plan.

Beth Merritt Miller (she, her, hers), Assistant Vice Provost
Shelly Wolf (she, her, hers), Administrative Analyst

MUSTANG SUCCESS CENTER
Shannon Stephens (he, him, his), Director
Carly Head (she, her, hers), Assistant Director
Christina Wolfe-Chandler (she, her, hers), Academic Advisor
Kara Hitchcock (she, her, hers), Academic Advisor
Lindsay Lacey (she, her, hers), Academic Advisor
Rebecca Richards (she, her, hers), Academic Advisor
Kyle Ross, (he, him, his), Academic Advisor, Athletics
Louise Torgerson (she, her, hers), Academic Advisor, Athletics
Zach Reed (he, him, his), Academic Advisor, Athletics
Alicia Cruz (she/her/ella), Academic Advisor, Cal Poly Scholars
Annie Xiong (she, her, hers), Academic Advisor, Cal Poly Scholars
Danny Zavala (he, him, his), Academic Advisor, Cal Poly Scholars
Dawin Whiten (he, him, his), Academic Advisor, Cal Poly Scholars

TRANSFER CENTER
Heather Domonoske (she, her, hers), Coordinator, Transfer Center

RETENTION
Charlotte Rinaldi (she, her, hers), Lead Retention Specialist
Gustavo Enriquez (he, him, el), Retention Specialist
Jacob Campbell (he, him, his), Retention Specialist
Tiffany Kwapnoski (she, her, hers), Retention Specialist
Explicit Commitment
Make explicit our commitment to diversity, equity, and inclusion throughout communication, programming, and physical spaces.

Data and Relationship-Informed Practices
Provide targeted services in support of students historically marginalized at Cal Poly across University Advising, including Athletic Advising, Retention, the Transfer Center, the Mustang Success Center, and Cal Poly Scholars advising.

Accessible and Affirming Advising
Increase cultural competence and cultural humility across the advising community via training and education in order to create a more accessible and affirming advising experience for students historically marginalized by Cal Poly.

Accountability
Clarify and document policies and practices valuing cultural competence in recruitment, on-boarding, and on-going training/development of professional and student staff.

University Strategic Plan Alignment
Alignment of University Advising Diversity Action Plan Goals with the University Strategic Plan

Appendix
Team subgoal action plans in-process (updated quarterly)
GOAL 1

Explicit Commitment
Make explicit our commitment to diversity, equity, and inclusion throughout communication, programming, and physical spaces.

Sub Goal 1
Develop a University Advising Diversity, Equity, and Inclusion statement as part of our values and goals that clearly espouses these core values.

Sub Goal 2
Display Inclusive Excellence statement prominently on our agendas, website, job postings, and other pertinent materials.

Sub Goal 3
Audit and implement changes to ensure spaces are accessible and resources are inclusive for individuals from various cultures and identities.

Sub Goal 4
Recognize, in waiting spaces, presentations, and other locations as appropriate, that the institution is on indigenous land.

Sub Goal 5
Develop and implement a UA DEI Student, Staff, and Faculty Advisory Board to inform and establish a mechanism of accountability for more inclusive implementation of policies and procedures.
GOAL 2

Data and Relationship-Informed Practices

Provide targeted services in support of students historically marginalized at Cal Poly, across University Advising, including Athletic Advising, Retention, the Transfer Center, the Mustang Success Center, and Cal Poly Scholars advising.

Sub Goal 1
Cultivate, strengthen, and maintain partnerships with affinity-based programs and services within both Academic and Student Affairs to intentionally remove barriers and, in a joint effort, create and maximize targeted programs so that students who have been marginalized by our institution can realize their full potential.

Sub Goal 2
Use student data collected by the CSU, University Advising, and other campus entities to identify, remove, or advocate for the removal of barriers within academic policies, practices, and procedures contributing to our graduation equity gaps.

Sub Goal 3
Use student data collected by the CSU, University Advising, and other campus entities to support improvement of existing programs and/or implementation of new programs specifically targeting identified equity gaps and risk factors.

Sub Goal 4
Maximize opportunities for student engagement and ensure University Advising is aware of and addressing the advising, transfer support, and retention needs of students across cultures and identities. Develop proactive and on-going connections with and amplify the voices of affinity-based student organizations.
GOAL 3

Accessible and Affirming Advising

Increase cultural competence and cultural humility across the advising community via training and education in order to create a more accessible and affirming advising experience for students historically marginalized by Cal Poly.

Sub Goal 1
Provide UA-funded DEI training opportunities annually for the campus-wide academic advising community and work with Center supervisors to encourage participation.

Sub Goal 2
Provide a minimum of two DEI training opportunities annually for UA staff in addition to supporting staff participation in available campus DEI trainings and events.

Sub Goal 3
Provide time at monthly staff meetings to reflect and share knowledge learned in DEI trainings/events. Discuss application of new knowledge to UA delivery of services.
GOAL 4

Accountability
Clarify and document policies and practices valuing cultural competence in recruitment, on-boarding, and on-going training /development of professional and student staff.

Sub Goal 1
Ensure required skills, knowledge, and abilities (SKAs), interview questions, and presentation prompts provide multiple opportunities to evaluate knowledge of DEI and specialized skills related to cultural competence in recruitment of all position types.

Sub Goal 2
Partner with Human Resources to implement practices and techniques that reduce search committee bias.

Sub Goal 3
Select inclusive search committee members whose voices represent many perspectives.

Sub Goal 4
Provide transparent documentation in annual University Advising DEI Report describing progress made in all outlined areas, including staff participation in DEI training and professional development.
### UNIVERSITY STRATEGIC PLAN ALIGNMENT

<table>
<thead>
<tr>
<th>Strategic Priority 1:</th>
<th>University Advising Goal 1</th>
<th>University Advising Goal 2</th>
<th>University Advising Goal 3</th>
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<tbody>
<tr>
<td>Enhance the Success of all Cal Poly Students.</td>
<td>✓</td>
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<tr>
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<tr>
<td>Cultivate the Excellence of All Employees.</td>
<td>✓</td>
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<th>Strategic Priority 3:</th>
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<td>Enrich the Campus Culture of Diversity, Equity, and Inclusion.</td>
<td>✓</td>
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#### Goal 3A:
Create an aligned and cohesive focus on diversity and inclusion across the university. | ✓ | ✓ | ✓ | ✓ |

#### Goal 3B:
Create and sustain a more diverse, equitable, and inclusive community that reflects and serves the diverse people of California. | ✓ | ✓ | ✓ | ✓ |

#### Goal 3C:
Prepare all students for their future through an education that includes diversity learning and reflects the principles of Inclusive Excellence. | ✓ | ✓ | ✓ | ✓ |

#### Goal 3D:
Further develop a campus climate that reflects the values of diversity, equity, and inclusion as well as free inquiry and mutual respect. | ✓ | ✓ | ✓ | ✓ |

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<tr>
<th>Strategic Priority 4:</th>
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<tr>
<td>Strengthen our Portfolio of Academic Programs.</td>
<td>✓</td>
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<th>Strategic Priority 5:</th>
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<tr>
<td>Create an Engaged, Vibrant, and Healthy community for Students.</td>
<td>✓</td>
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<th>Strategic Priority 6:</th>
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<tr>
<td>Leverage Data and Technology to Support the Institution’s Mission.</td>
<td>✓</td>
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<th>Strategic Priority 7:</th>
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<td>Secure our Future by Improving Finances, Facilities, and Systems.</td>
<td>✓</td>
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APPENDIX A

Goal 1: Explicit Commitment
Make explicit our commitment to diversity, equity, and inclusion throughout communication, programming, and physical spaces.

Sub Goal 1:
Develop a University Advising Diversity, Equity, and Inclusion statement as part of our values and goals that clearly espouses these core values.

ACTIONS

What will be done?
1. Define Diversity, Equity, and Inclusion (is there a campus definition?)
2. Determine core values.
3. Identify existing UA/MSC/Retention/Transfer mission, values, and goals and align with DEI efforts
4. Draft the DEI statement, submit it for review to UA Leads (BMM, SS, CR, HD), and finalize statement.

RESPONSIBLE

Who is going to do it?
Lead (Beth) in the group who coordinates:
1. (Zach) DEI definitions in OUDI
2. (Louise) NACADA core values (NACADA Vision and Mission), Cal Poly and OUDI core values (Cal Poly Statement on Diversity), NCAA core values (NCAA Inclusion Statement) and drive the definition of UA core values into the “statement.”
3. (Kara – outreach to each area): Collect the mission statements, values (areas where there are not professional organization guidance), goals from all areas in UA, then map with DEI Goals and Sub Goals to determine values for DEI statement.
   a. Develop an Excel document with each area’s (MSC, Retention, Transfer) mission, goals, and values.
   b. Add DEI Goals and Sub Goals to spreadsheet and map themes.
4. Write draft statement.

RESOURCES

What resources/support are available?
1. Refer to links in the timeframe section.
2. Refer to links in the timeframe section.
3. Have existing missions, (values?), goals for each area.
4. Our team! And utilizing Michael’s expertise for final draft review.

What resources/support are needed?
Michael.
TIMEFRAME

By when?

1. Definitions: Identify if they are defined by campus or OUDI by July UA all staff meeting (July 9th).
   a. OUDI - https://diversity.calpoly.edu/inclusive-terminology/
   b. Library - https://guides.lib.calpoly.edu/c.php?g=-988130
   c. Statement on Diversity - https://academicprograms.calpoly.edu/content/academicpolicies/diversity-statement
   d. Academic Senate Resolution on Diversity and Inclusion

2. Core Values
   a. Align the professional organizations core values by July UA all staff meeting (July 9th).
      a. Solicit feedback from UA group, what is missing and needs to be developed.
   b. Develop DEI core values draft by August UA staff meeting:
      a. Share draft with group to get initial reactions.
      c. Revise, after receiving feedback, and share with UA Leads by September 1st.

3. Develop area’s mission, values, goals spreadsheet by UA all staff meeting - July 9th

4. Draft statement:
   a. Solicit feedback by October UA staff meeting
   b. Make revisions – solicit feedback from UA Leads by November 1st.
   c. Share out final statement by December UA staff meeting

METRICS

How will you know when this goal has been met?

We have the statement finalized.
Goal 3: Accessible and Affirming Advising

Increase cultural competence and cultural humility across the advising community via training and education in order to create a more accessible and affirming advising experience for students historically marginalized by Cal Poly.

Sub Goal 3:
Provide UA-funded DEI training opportunities annually for the campus-wide academic advising community and work with Center supervisors to encourage participation.

**Actions**

**What will be done?**

1. Define “historically marginalized”, “accessible advising,” “advising community” (remember peers) (Alicia, Danny)
2. Include definitions in glossary in training/pro dev and DAP/share with DEI statement group
3. Define the difference between training and pro dev (Christina, Charlotte, Danny)
4. Conduct needs assessment, gather input from leaders (Alicia, Danny, Kyle)
   a. Research DEI needs assessment best practices (NACADA, NCORE)
   b. Audit of DEI training and pro dev
5. Review what already exists in advising training and pro dev (Christina, Lindsay, Charlotte)
6. Create 3-year strategic plan to address both. (Committee, Advising Leaders)
   a. Plan should be guided by needs assessment, current issues, annual theme and should highlight marginalized students.
   b. What is the re-delivery timeline/guideline (how often do we repeat/recycle rate)?
   c. Determine structure of training/pro dev in order to delineate the responsibility
   d. Include group of advising leaders in planning process
   e. Provide periodic updates at weekly advising meetings
   f. Involve/consult expertise of Cal Poly and external community
7. Update training (Christina and Lindsay)
8. Plan pro development (Charlotte/Retention/advising leaders)
9. Share final plan with advisors and advising leadership (buy-in) (Beth/Associate Deans)
10. Deliver training and pro dev based on strategic plan (Determined by strategic plan)
11. Revisit and adjust strategic plan (committee)

**Responsible**

**Who is going to do it?**

Charlotte, Danny, Christina, Alicia, Kyle, Lindsay
What resources/support are available?
UA Committment

What resources/support are needed?
People and time to implement strategic training/pro dev plan
Expertise in cultural humility, etc (experts on these topics, including outside of advising)
Funds to support delivery
Buy-in across advising community

By when?
July 14, 2021 – Compile found research document and meet to agree on terms - Defined terms, differentiate between training/pro dev
August 30th, 2021 – send needs assessment
September 10th, 2021 – assessments due
Mid September – Review needs assessment
October 15th, 2021 – Audit current training and pro dev
December, 2021 – findings presentation at advising retreat
June 30th, 2022 – plan completed
September, 2022 – plan implemented

How will you know when this goal has been met?
Subgoal:
Provide opportunities
Measure participation/attendance rates

Goal 3:
Use definitions and needs assessment to determine this
Direct – situational scenario – assess understanding (what would you do in this situation)
Indirect – self-reporting
Measure confidence in cultural competence (perhaps including humility?) (from training)
cultural humility (from training)
providing accessible advising – through people telling us
affirming advising, across advising community
Goal 4: Accountability

Clarify and document policies and practices valuing cultural competence in recruitment, on-boarding, and on-going training/development of professional and student staff.

Sub Goal 4:
Provide transparent documentation in annual University Advising DEI Report describing progress made in all outlined areas including staff participation in DEI training and professional development.

**Actions**

**What will be done?**

To create the report:

1. Keep track of activities/report items in a shared document
2. Determine who will be responsible (see below).
3. Create a report template
4. Establish timeline for completed report, who to submit it to - who are the stakeholders and who needs to receive a copy of the report.

Other items:

1. Determine frequency of report - is this quarterly or annual?
2. Determine which sub-goals the report will focus on, or if this is an overarching report/progress check.
3. Determine which events are considered DEI trainings (this is dependent on goal 3-1).
4. Decide how we’re going to collect the information.
5. Establish regular check-ins for progress updates from other groups (quarterly).
6. Clarify roles & responsibilities of “working group.”
7. Decide if we create template this summer 2021 or wait.

**Responsible**

**Who is going to do it?**

Goal 4 Working Group (volunteers from UA)
Shannon and Beth will ultimately be responsible for submitting the report to stakeholders.

**Resources**

**What resources/support are available?**

Items from other subgoals - who attended trainings/professional development (Goal 3-1) & creation of DEI statement (Goal 1-1).
Regular feedback from other UA staff.

**What resources/support are needed?**

Outline/timeline of events that are happening that need to be included in report.
Conversation about what is included as DEI trainings.
**TIMEFRAME**

*By when?*

Dependent on completion of Goals 1-1 and 3-1.

End of summer (before the beginning of fall term?) – specific date can be determined later. Need to account for edits and re-assessment, changes to be made before the final report is submitted.

Quarterly check-ins and “pulse checks” for working group

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**METRICS**

*How will you know when this goal has been met?*

Is our report done?

Benchmark this report compared to other entities on/off campus.

How do we determine the effectiveness of “transparency,” and what do people who read our report take away from it? Determine - is campus more aware of what UA’s DEI actions are? (Should we have bigger goals for this report?)

Do we need to include benchmarking of things like attendance and percent increase/decrease? For instance, did more UA staff attend DEI trainings year to year?

After we submit report on regular basis, is the campus more aware of UA DEI initiatives? Benchmark this first report to our future reports - set goals for future improvement.