INTRODUCTION: WHAT IS COLLECTIVE IMPACT?

Jodzi De Leon, the university’s inaugural Vice President of Diversity and Inclusion, introduced the Collective Impact approach to advance diversity and inclusion at Cal Poly during AY 2017-2018. The Collective Impact framework is premised on the belief that no single policy, department, organization or program can tackle or solve the increasingly complex social problems we face as a society. The approach calls for multiple organizations or entities from different sectors to work toward a common agenda or shared aspirations using mutually reinforcing activities with shared measurements. Unlike a collaboration or partnership, Collective Impact initiatives have centralized infrastructure—known as a backbone organization or “container for change”—with dedicated staff whose role is to maintain continuous communication and to help participating units shift from acting alone to acting in concert.¹

There has already been significant labor focused on diversity and inclusion that gets done on this campus—and often by a handful of dedicated change agents. In order to effect change, especially change that is sustainable, university-wide involvement is needed. The Collective Impact approach is thus a good fit for Cal Poly. With OUDI serving as the container for change, Collective Impact will help align work that is already happening throughout the campus and identify ways to make this work of inclusive excellence everyone’s responsibility. An intentional strategy of the Collective Impact process at Cal Poly has been to bring together different units and individuals that have structurally not had to work together. As was brought up many times in our forums and

meetings, we are too often “silo-ed” on campus. Because the Collective Impact work is itself inclusive, there is greater buy-in because diverse groups have participated in the process.

This work is also about identifying strengths, resources, and infrastructures that exist, any gaps that limit the effectiveness of diversity and inclusion work, and which entities might be responsible for a particular recommended action. As an iterative process, Collective Impact approach culminates in a set of recommendations and a strategic plan created and enacted by units throughout the university. Then the process begins again as new or continuing gaps, problems, or aspirations are identified and collectively addressed to create a movement toward fulfilling our shared vision for Cal Poly.

The events of this year provided even more relevance to the work of Collective Impact at Cal Poly as marginalized student, alumni, faculty, and staff demands both echoed problems Collective Impact participants were also identifying and gave guidance to Strategy Groups as they were forming their recommendations. The anti-Black and anti-Brown actions by Greeks and the forms of hate speech acts on campus contributed to a worsening campus climate. These actions and the student protests, especially during Open House, brought national attention to how racism and inequity have been institutionalized at Cal Poly and the urgency of making substantive and durable progress. While racist incidents on campus pointedly draw attention to areas of institutional weakness and propel the university to quick, corrective reaction, the aim of the work of Collective Impact is to continually and proactively assess and improve campus climate, policies, and resources for students, staff, and faculty in order to create educational equity and access.

INITIATING COLLECTIVE IMPACT FOR DIVERSITY & INCLUSION: FALL 2017

FIRST YEAR TIMELINE

---

LAUNCH. OUDI staff—the “container for change”—for Academic Year 2017-2018 included Jozi De Leon (VP and CDO), Kari Mansager (Program Director), Staci Roseboro-Shoals (Executive Assistant), and Denise Isom (Associate Faculty Director), with two faculty members, Julie Garcia and Grace Yeh, serving as Faculty Associates. The newly formed team began in September to plan for introducing the Collective Impact framework and process to the campus.

OUDI hosted a series of forums during Fall 2017, inviting participants from across the campus to:

- Learn about the Collective Impact framework and process
- Articulate shared vision, aspirations, and values to guide the diversity and inclusion work at Cal Poly
- Design strategy groups around key areas of effort identified by forum participants

It is important that the forums were interactive, participatory, and dialogue-driven to ensure campus buy-in. The creation of the shared vision and identification of gaps in campus diversity and inclusion efforts emerged from different large and small group discussions. Priorities for strategy groups were also collectively decided.

- October 6, 2017, Diversity Partners Forum. This half-day working meeting was the first campus introduction to the Collective Impact process and the start of formulating the Collective Impact’s vision for diversity and inclusion on our campus. For this meeting, campus diversity partners were invited—these are the individuals whose position on campus included responsibilities that address diversity and inclusion directly. This group created the first draft of the shared aspirations. They also discussed what has prevented these aspirations for institutional change from being achieved. As was pointed out in this meeting, as well as in many meetings after this initial one, one of the major challenges is that diversity, equity, and inclusion (DEI) initiatives have not been coordinated or collaborative on our campus—exemplified by the fact that this meeting was the first one that brought all campus diversity partners to the table. While this type of working meeting seems to be the first on our campus, there are other universities and colleges we can look to as potential models as OUDI continues to develop the campus’s organizational capacity for sustaining DEI initiatives.

- October 10 and 25, 2017, “Building Connections to Advance Diversity & Inclusion” forum. OUDI hosted two working meetings to introduce Collective Impact to the whole campus and to launch the process of campus-wide involvement to address diversity and inclusion. Two meetings—both covering the same agenda—were scheduled to ensure broad campus participation in shaping aspirations.

- November 28, 2017, “Diversity & Inclusion Collective Impact Report Out.” After collecting and processing the feedback from the forums, this meeting reported back to the campus the final draft of the shared vision, aspirations, and values. As well, it introduced the three strategy groups and their co-leads and invited campus community members to
join strategy groups that would meet through Winter and Spring 2018 to create a set of recommendations for the campus and for the strategy group itself.

**SHARED ASPIRATION.** Articulating a shared vision was a key first step not only to align efforts but, more importantly, to build a movement that makes large-scale, institutional change possible. Strategic Plans that lack a larger guiding vision are more likely to fine-tune existing operations. The following are the guiding statements drafted from the Fall forum discussions.

**Shared Vision:** Cal Poly will become a model for recruiting and retaining a diverse campus community that will be enriched by its diversity, cultural humility, inclusive excellence and unique “Learn by Doing” philosophy.

**Shared Aspirations:**
- We will eliminate the achievement gap between traditionally underrepresented students and others.
- We will have curriculum and policies driven by our diversity and inclusion values.
- We will work towards becoming a Hispanic-serving institution and/or minority-serving institution and serving a student population that is representative of California. Our staff and faculty will also reflect California’s diversity.

**Shared Values:**
- We are a community that is committed to diversity, inclusive community building, equity, cultural humility, and social justice as important aspects of everything we do.
- We believe that trust and mutual respect are gained through transparency and communication and are key in empowering and strengthening our university community.
- We incorporate inclusive excellence as central to our relevance, sustainability, and academic rigor as we become a university for the future.

**STRATEGY GROUPS BEGIN: WINTER/SPRING 2018**

From the articulated vision, aspirations, and values, forum participants proposed different strategy groups that could be formed to review and assess the state of diversity and inclusion at the university and could then provide a set of short- and long-term recommendations. The three strategy groups created are: Campus Climate, Curriculum, and Recruitment and Retention. OUDI identified co-leads for each Strategy Group, selecting individuals with the appropriate expertise, experience, and institutional roles with the capacity to make an impact on policies and practices. The co-leads and the OUDI staff constitute the **core leadership team** for the Collective Impact process.

Co-Leads of Strategy Groups are expected to:
- Commit time (~2-3 hours monthly) to the Collective Impact work
- Be collaborative leaders and facilitators, fostering an inclusive culture rather than serving as the deciders
- Be willing and able to perform key tasks (e.g., facilitate meetings, take notes, plan meeting agendas)
Campus Climate Strategy Group

Specific Charge: Develop strategies and actions that will move the campus climate towards one that reflects the values of love, empathy, respect, inclusion, and the valuing of differences in order to increase the well-being of all individuals at Cal Poly.

Co-Leads:
- Blanca Martinez-Navarro, Ph.D., Assistant Dean of Students for Student Support, Success and Retention
- Lanaya Gaberel, Director for Employee and Organization Development in Human Resources
- Liz Schlemer, Ph.D., Professor of Industrial and Manufacturing Engineering and Interim Associate Dean for Student Success and Undergraduate Programs

Curriculum Strategy Group

Specific Charge: Infuse diversity, inclusion, and social justice into the curriculum to advance socially relevant instruction and prepare all students for the future.

Co-Leads:
- Camille O’Bryant, Ph.D., Associate Dean for student success, inclusion and diversity in COSAM and Professor of Kinesiology
- Denise Isom, Ph.D., Chair and Professor of Ethnic Studies, Associate Faculty Director of OUDI
- Jennifer Teramoto-Pedrotti, Ph.D., Associate Dean for Diversity and Curriculum in CLA and Professor of Psychology & Child Development

Recruit and Retain Strategy Group

Specific Charge: Fulfill our moral imperative to recruit and retain underserved and underrepresented students (URM, first generation, low income, women in male-dominated fields, etc.)

Co-Leads:
- Jamie Patton, Ed.D., Assistant Vice President for Student Affairs, Diversity and Inclusion
- Jo Campbell, Ph.D., Assistant Vice President for Student Affairs and Executive Director of University Housing
- Melissa Furlong, Director for Outreach and Recruitment

Campus Participation in Strategy Groups

Once the strategy groups, their charge, and the leadership team were defined, the campus community was invited to join a strategy group. Eighty-five (85) individuals signed up online (diversity.calpoly.edu) or by contacting the core leadership team to participate in one or more of the strategy groups. OUDI encouraged supervisors to approve staff use of time to participate in these meetings. All Strategy Group members are expected to:

- Be genuinely interested in effecting change in the strategic area
• Be action-oriented “doers” who commit to attending meetings and reviewing materials; for continuity, we recommend a norm of not sending substitutes to meetings

Prior to the first meeting of the strategy groups, each strategy group co-leads contacted recommended and requested members, inviting them to join and attend the first All-Strategy Group meeting on January 12, 11am-1pm, in the KTGY Gallery. This All-Strategy Group Meeting began with a brief review of the Collective Impact model, the strategy groups, and the shared aspirations. Its agenda then included:

• Explanation of the work plan and expectations for the strategy groups during the Winter and Spring quarters, culminating in submission of recommendations.
• Description of different “Change Models” presented by Liz Schlemer (Campus Climate co-lead, CENG faculty).
• An activity where each strategy group identifies measurable aspects in the language of their strategy group’s charge to brainstorm what shared measurements could be used to assess efforts.

**Strategy Group Work Plan, Responsibilities, and Organizational Support**

Strategy groups met monthly during Winter and Spring quarters, with each meeting typically scheduled for 2 hours. Their deliverable at the end of Spring was a set of short- and long-term recommendations for high leverage activities relevant to their charge. In preparing the recommendations, each strategy group had to:

• Assess current state of data and information and current projects/projects, including both gaps and assets. Groups examined past efforts and reports like the 2016 “Diversity Mapping” document⁴ and additional information compiled on OUDI’s website.⁵ Research and institutional knowledge was a key component of the process and was acquired through a number of means in the Strategy Groups, including having the relevant experts participating in the Strategy Groups, bringing in Presenters, or sharing published best practices from other universities.
• Created subgroups to draft components of each group’s recommendations.
• Identify metrics needed to assess success related to strategy group’s charge.
• Articulate recommendations as “S.M.A.R.T.” goals—Specific, Measurable, Attainable, Relevant, Timely. This means that Strategy Groups needed to identify high leverage activities.

Continuous communication and information sharing is central to the success of creating collective impact to fulfill Cal Poly’s diversity and inclusion vision. OUDI, as the container for change, supported Strategy Group efforts and authentic community engagement by facilitating continuous communication. Strategy groups were also encouraged to invite co-leads/members from other strategy groups to meetings when discussing intersecting topics. Throughout the process, OUDI:

---

⁵ [https://diversity.calpoly.edu/campus-wide-diversity-efforts](https://diversity.calpoly.edu/campus-wide-diversity-efforts)
• Had staff member(s) at every Strategy Group meeting to assist with overall meeting logistics, synthesize the discussions and decisions from the meeting, and send a follow-up email to the working group and core leadership team.
• Hosted quarterly all-Strategy Group meetings in order to share and build upon existing efforts and to strategize supporting and leveraging one another’s activities.
• Created a shared One Drive folder for the strategy groups.
• Published a quarterly CI newsletter and this year-end report, specifically aimed at sharing information for those participating in the strategy groups and to know what other strategy groups are trying/covering.

RECOMMENDATIONS: SPRING 2018

The Strategy Group recommendations were presented on June 8, 2018, at the final Collective Impact meeting for the Academic Year. The meeting ended with identifying the overlaps between strategy group recommendations and any gaps that should be addressed or language emphasized as OUDI works to compile the recommendations over the Summer to present to the Inclusive Excellence Council in the Fall.

Below is a summary of the recommendations. Overlaps in the recommendations are denoted with an asterisk (*). Gaps in the recommendations based on the June 8 discussion are summarized briefly below.

Campus Climate Strategy Group

Problems Identified
• Need for clear communication and messaging around clear expectations that everyone is responsible for diversity and should be recognized for such work
• Need for leadership investment, including venue(s) for hearing campus community voices and to communicate clear expectations of conduct with associated accountability system
• Need for partnerships and collaborations particularly in the community
• Need for enhanced education and learning, particularly with communicating diversity and inclusion during onboarding/orientation
• Need for institutional self-assessment including a new campus climate survey with a clear report and action plan

Recommendations:
1. Communicate clear expectation that everyone is responsible for diversity work, campus-wide, and should be recognized for such work.
2. Provide a report out (state of diversity) in Fall quarter and a Town Hall in Spring quarter.
3. Provide a consistent platform for students, faculty, and staff to express feedback about campus climate to administration and other decision-makers.*
4. Communicate clear expectations of conduct with associated accountability systems.
5. Improve the relationship between San Luis Obispo community and Cal Poly students, faculty, and staff, especially those from underrepresented groups.
6. Enhance the onboarding of students, faculty, and staff and embed into new employee orientation learning opportunities related to diversity and inclusion.*
7. Conduct a campus climate survey with a clear action plan for how report findings will be utilized.

Curriculum Strategy Group

Problems Identified:
- Need for increased awareness about the importance of infusing diversity, inclusion, and social justice into the curriculum or advancing socially relevant instruction.
- Need for more professional development opportunities to learn how to infuse diversity, inclusion, and social justice into the curriculum
- Need for better retention of faculty and staff who are interested in and/or have the expertise to advance culturally relevant instruction
- Need for a more defined community of faculty and staff who are interested in/committed to advancing socially relevant instruction
- Cal Poly does not have a clear or sustainable record of preparing students for the future as evidenced by findings from DLO Assessment project (2008-2011) or observations from WASC re-accreditation report

Recommendations:
1. We recommend that each college/unit increase their explicit commitment to increasing diversity and inclusiveness awareness, knowledge, and skills, specifically in attracting (and successfully hiring) applicants that value diversity and inclusion.
2. Creation of a “First Year Experience” for all new faculty that consists of attending a specific number of trainings to increase cultural competence before full teaching loads are in place.*
3. We recommend that a group be established on campus for young professionals who are devoted to diversity topics and work.*
4. We recommend that the University DLOs become ULOs and are utilized as CLOs and PLOs in course proposal and course and program reviews/assessments.
5. We recommend that the RPT/SPAF process include a review of diversity and inclusion effort.
6. Expand the current University USCP requirement to two courses, a lower and upper division.
7. We recommend that Cal Poly commits to university-wide cluster hires focused on diversity and inclusion.

Recruit and Retain Strategy Group

Problems Identified
- We can’t compete with the financial support provided by the UCs and private institutions
- Campus visits by prospective students are not always funneled through Admissions
- Admissions & Recruitment is not adequately resourced (not enough FTEs/unable to pay volunteers-Poly Reps, Partners Ambassadors, Hometown Heroes)
• Cross Cultural Centers are not adequately resourced (not enough FTEs and need more programming funds)
• Faculty, staff, and students of color face discrimination in local communities when seeking housing
• Onboarding is inconsistent across units and there is a need for mentoring programs for faculty and staff of color

Recommendations
1. Provide Admissions & Recruitment additional resources (staffing, programming, and targeted scholarship programs) to enhance strategic recruiting.
2. Use data being collected by University Advising to support implementation of new programs specifically targeting identified gaps and risk factors.
3. Require all faculty and staff to provide a statement about the role of diversity and inclusion in Higher Education as a supplemental question in all applications and answer a question about diversity and inclusion during their interview.*
4. Strategic coordination of efforts to publicize diversity and inclusion resources to all students.
5. Provide additional resources (staff and programming funding) from the Cross Cultural Centers.
6. Create a university-wide snapshot of student volunteers and paid positions around recruitment and retention of underrepresented students.
7. Implement the Exit Interview Protocol that includes exit interview for all permanent Cal Poly employees.*
8. Create a Housing Liaison position to assist newly hired faculty and staff transition to the San Luis Obispo County community.*
9. Develop a mentoring program for new faculty and staff of color and from other underrepresented groups.*

Initially Identified Gaps in Recommendations
• Recruitment and retention of two constituencies were not addressed: transfer students and lecturers.
• There were more details offered that focused on leadership/administration being equipped to address DEI initiatives, including recruitment of administrators from underrepresented groups and professional development of senior leadership and senior faculty/staff.
• Much of what was identified as missing from the recommendations is actually addressed in the draft recommendations, but the points made in the meeting discussion suggest that the final draft of the recommendations will need to make it clear what the collective priorities are.

Recommendations for Strategy Groups themselves
One of the challenges that the Strategy Groups faced was having student input. There were a number of students that were able to attend some of the meetings, but overall, there was not a consistent presence. It was clear that students, for any number of reasons, were not finding their way to signing up or attending meetings though the forums and communication from OUDI invited their participation. One recommendation is that next year, instead of having students come to the Strategy Group meetings, the Strategy Groups should go out students, for example, to present to
or collect feedback from student organizations. Other potential avenues for getting student input are through the Student leadership summit (one group had presented to the Curriculum and to Campus Climate strategy groups), or working with student researchers or senior project students.

The Recruit and Retain Strategy Group recommended breaking up this group into one group focused on recruitment/retention of underrepresented students and another focused on recruitment/retention of faculty/staff.

Campus Climate Strategy Group suggested that next year this group can be used to provide clarity on recommendations, input on proposed strategies before implementation, and feedback on campus efforts and progress. Select members can be used to collaborate across campus on implementation of recommendations.

Finally, it should be noted that in this initial implementation of the Collective Impact framework, the timeframe for creating recommendations is shorter than it will be in subsequent years, though in many ways the understanding of both problems and solutions have long been there but without the full capacity for taking action. During AY 2018-2019, Strategy Groups will have a whole year to assess current efforts and craft new recommendations, with more opportunity to consult experts and campus units and research problems and solutions.

**NEXT STEPS**

Summer 2018: OUDI will synthesize the recommendations and create a draft strategic plan.
Fall 2018: Inclusive Excellence Committee review recommendation and approve strategic plan
Fall 2018: OUDI will host a “State of Diversity and Inclusion” to share recommendations and strategic plan
Fall 2018: Strategy Groups and subgroups will (re)form and begin meeting/implementation
Winter/Spring 2019: Strategy Groups continue to review existing efforts and assess and recommend necessary actions
2018/2019 Academic Year End: Strategy Groups report out recommendations
Continue the Collective Impact cycle to reach our aspirations to advance diversity and inclusion at Cal Poly!