IMSA'S EQUITY AND EXCELLENCE PLAN DEVELOPMENT

THEORY OF CHANGE EXECUTIVE SUMMARY

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Introduction

This has been a year of transition, moving from the 2014 Board Approved Diversity Plan to the development of its' next rendition, the Equity and Excellence Plan, as directed by the 2018 Board Approved Equity and Excellence Policy. Additionally, this policy aligns with the IMSA Impact and Outcomes statement, "By 2022, IMSA is a recognized global leader and catalyst in equity and excellence in STEM teaching and learning, innovation and entrepreneurship."

In the spirit of inquiry and innovation and in an effort to to embrace the inclusive nature of IMSA, the development of the Equity and Excellence Plan was approved as an official research study by the Institutional Review Board. The purpose of the study was:

> *to develop an equity and excellence plan that is driven by the IMSA Board Approved Equity and Excellence Policy, rooted in Theory of Change, informed by data, and facilitated through an inclusive, equity-minded frame.*

Being that IMSA is shifting from an approach of diversity and incusion to include a focus on equity and that this work is now the responsbility of the enitre institution; the Theory of Change was utilized to provide IMSA with a framework to guide that change and ultimately inform the development of the Equity and Excellence Plan.

> *A theory of change is a predictive assumption about the relationship between desired changes and the actions that may produce those changes. The most distinctive characteristic of Theory of Change in contrast to other methods is that it focuses first on outcomes, rather than interventions.*

There are six elements of the Theory of Change, as defined below:

Theory of Change Element	Definition
Outcomes	The intended impact on the world and how the IMSA community will be different because of equity and excellence.
Rationale	Explains the value of Equity and Excellence and how intermediate outcomes will assist in the achievement of the long term outcome.
Assumptions	Conditions or resources that one believes are needed for success, and which you believe already exist and will not be problematic to maintain.
Pre-Conditions	They are necessary before each outcome can be achieved. Considers barriers to achievement of outcome(s).
Strategies	Interventions implemented to create desired change and achieve outcome(s).
Indicators	Measurements to assess the achievement of outcome(s).

Methodology

The Illinois Mathematics and Science Academy implemented two phases of the Theory of Change process by working though the various elements, with the exception of *"indicators"*, as those will be determined based on the findings of these initial phases. Theory of Change - Phase 1 included extracting the long-term/intermediate outcomes from the Equity and Excellence Policy, drafting a rationale focused on the value of equity and excellence in relation to the Equity and Excellene Policy outcomes, and implementing a data collection process to identify assumptions, pre-conditions and strategies. Theory of Change - Phase 2 included having modified focus groups with IMSA departments and teams to inform them of IMSA's progress and approach to the development of the Equity and Excellence plan, address Equity and Excellence policy questions, rank/prioritize assumptions, pre-conditions and strategies, and discuss additional department/role-specific strategies.

A Modified Focus Group (MFG), also known as Nominal Group Technique is a highly structured technique combining characteristics of an individual survey and a focus group. MFG is a group process that encourages contributions from everyone and facilitates quick agreement on the relative importance of issues, problems, or solutions. This technique gathers information by asking individuals to respond to questions (derived from Theory of Change - Phase 1 Survey sent to IMSA Community), and then asks participants to prioritize the ideas or suggestions (Theory of Change - Phase 2 survey/meeting held with individual departments). This approach increases the likelihood of equal participation and affords equal influence to conflicting values and ideas.

The long-term and intermediate outcomes were previously defined by IMSA's Equity and Excellence Policy; while the rationale, based on research and best practices, was developed by the Director of Diversity, Equity and Inclusion. To identify the other Theory of Change elements, a survey was administered to IMSA faculty and staff, asking their perspective of related assumptions and pre-conditions for each of the intermediate outcomes, and then suggest strategies to achieve respective outcome and ultimately assist in the achievement of the long-term outcome, of which 119 responded. This information was analyzed for emergent themes, later to be ranked and prioritized.

The next step entailed asking IMSA departments/teams to participate in a modified focus group to rank the assumptions and pre-conditions by level of importance; and then prioritize the strategies, as well as put forth department specific strategies. There were 114 faculty/staff respodents from 15 departments (Admissions, College and Academic Counselors (CAC), Center for Teaching and Learning (CTL), Facilities, Human Resources (HR), Center for Innovation and Inquiry (IN2), Information Resource Center (IRC), Information Technology Engineering Group (IT), Instructional Technology and Media Center (ITMC), Office of Institutional Research (OIR), Office of Public Affairs (OPA), Residence Life, Security, Student Inquiry and Research (SIR), Student Life) and 3 teams (Curriculum Assessment Leaders (CAL), Senior Leadership Team (SLT), Strategies). Each department/team only responded to the outcome(s) aligned with their respective group. To ensure that the participants understood the direction of IMSA and could provide informed, thoughtful responses, they were asked to read the Equity and Excellence Policy, of which 109 completed. Clarifying questions were addressed during the group sessions.

To be inclusive, 99 IMSA student leaders from Peer Multicultural Educators, Student Council, and 9 cultural groups (Alma Latina, Beautiful Empowering Ladies Leading All Students, Black Student Union, Eastern European Club, Hatikvah, Irish-American Students, Indian Student Association, Muslim Student Association, Spectrum) also participated in modified focus groups and were specifically asked to discuss strategies for the intermediate outcome related to student recruitment, support and retention. These groups were selected, as they are familiar with IMSA's Equity and Excellence Policy, and thus able to provide thoughtful, informed responses.

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The duration of this report will share the IMSA-specific Theory of Change elements, with the exception of *"indicators"*, and related findings. This Theory of Change data, along with findings from the Equity Context Analysis Process (ECAP) will inform the devlopment of IMSA's Equity and Excellence Plan.

Equity and Excellence Policy Outcomes

IMSA's Equity and Excellence Policy defined the long-term outcome as:

> *The Academy recognizes and acknowledges the historical underrepresentation and marginalization of culturally, linguistically, and economically diverse groups, both universally, and particularly, in STEM education and professions. These disparities also exist in the representation of the Academy's workforce. We are committed to advancing equity in STEM education and representation and creating a diverse, inclusive community of global citizens who can realize their full potential, and execute our mission to advance the human condition, through a model of Equity and Excellence.*

It further defined seven intermediate outcomes, as needed to help IMSA achieve the long-term outcome, as described below:

1. *Developing and using an equity lens when considering major policies, programs, practices, or decisions in order to realize more equitable outcomes.*

2. *Implementing strategies to recruit, support, and retain Culturally, Linguistically and Economically Diverse groups and support and retain Marginalized groups.*

3. *Providing professional learning that continuously develops the Cultural Competence and equity awareness of staff, including faculty, as well as board members and external partners.*

4. *Supporting research, scholarship and innovative expression of staff, including faculty as well as external partners that either address or promote the Equity and Excellence Model.*

5. *Implementing strategies based on the Equity and Excellence Model to recruit, support and retain staff, including faculty, as well as board members and external partners.*

6. *Differentiating resources as necessary to provide every student with access to Culturally Competent pedagogy, curriculum, co-curriculum, support, facilities and other educational resources with an ultimate goal of achieving Excellence.*

7. *Addressing Culturally, Linguistically and Economically Diverse and gender-based STEM education/career gaps by developing student and professional programs and services, as well as conducting research, that will inform strengthening and diversifying the STEM education to career pipeline.*

Rationale for Equity and Excellence

According to the National Association of Diversity Officers in Higher Education (NADOHE), a fundamental commitment to inclusive excellence embedded throughout educational institutions is critical to their health and functioning. Inclusive excellence starts at the highest level of administrative authority, is expressed prominently in institutional missions and strategic plans, and is supported through meaningful allocations of fiscal, human, and physical resources. NADOHE further suggests that education leaders should embody and demonstrate the critical values of equity, diversity, and inclusion, and should enable entire campus communities to access and articulate the contributions of and the rewards gained from an inclusive learning and working environment. *Over the past two decades, there have been national trends toward (a) diversification of students and faculty in colleges and universities throughout higher education (b) assessment and improvement of the campus climate for diversity (c) improvements in the representation and inclusion of diversity in the curriculum (d) development of intergroup dialogues in curricular and co-curricular student engagement and (e) integration of broad campus-wide diversity plans integrated into institutional strategic planning.* Being that IMSA is under the Illinois Board of Higher Education and that IMSA's Equity and Excellence Policy is rooted in Inclusive Excellence, the need for an Equity and Excellence Plan is justified. In addition, adopting these best practices are in alignment with the outcomes laid out in IMSA's Equity and Excellence policy and will assist in achieving the long-term outcome. [1]

This same diversity, equity and inclusion trend is evident on the global level. The United Nations Educational, Scientific and Cultural Organization (UNESCO) is the United Nations' specialized agency for education that provides global and regional leadership in education. UNESCO states "education is a basic human right and the foundation on which to build peace and drive sustainable development". In fact, Sustainable Development Goal 4 calls for countries to *'ensure inclusive and equitable quality education, and promote lifelong learning opportunities for all'*. Being that IMSA has adopted the United Nations Sustainable Development Goals; an Equity and Excellence Plan can assist in making a global impact and guide the achievement of IMSA's Impact and Outcome Statement, "By 2022, IMSA is a recognized global leader and catalyst in equity and excellence in STEM teaching and learning, innovation and entrepreneurship." Furthermore, it can help IMSA achieve the long-term goal of creating a diverse, inclusive community of global citizens who can realize their full potential, and execute our mission to advance the human condition. [2]

IMSA also utilizes the Danielson's Framework to guide teaching and learning. This framework has diversity and equity at the heart of it, *"it is the primary common theme and describes the ultimate purpose of our work with students... in the classrooms of excellent teachers, the purpose of instruction is not the transmission of basic knowledge or student compliance but deep understanding, important learning, and active intellectual engagement so that each student can succeed in school and beyond."* If equity is the goal, *"it is important for students, all students to acquire deep and flexible understanding of complex content, to be able to formulate and test hypotheses, to analyze information, and to be able to relate one part of their learning to another."* Students need to experience this type of learning to be successful in their education, their careers, and their lives. An Equity and Excellence plan can enhance IMSA's application of the Danielson Framework in an intentional and equity-minded manner, and assist IMSA in achieving the long-term outcome of advancing equity in STEM education. [3]

According to the Midwest and Plains Equity Assistance Center, "*educational equity is when educational policies, practices, interactions, and resources, are representative of, constructed by, and responsive to all people such that each individual has access to, can participate, and make progress in high-quality learning experiences that empower them towards self-determination and reduces disparities in outcomes regardless of individual characteristics and cultural identities.*" However, the assurance of great teaching for every student has proven difficult to achieve in both policy and practice. According to the Danielson Framework, teachers strive for excellence, but "a commitment to excellence is not complete without a commitment to equity." Each student deserves access to world-class teaching and learning environments that promote joyful inquiry, intellectual rigor, and reflection. Thus, an Equity and Excellence Plan will not only assist IMSA in addressing educational inequities, but can also be shared with the educational sector to advance excellence. [4]

These educational inequities also exist in STEM education and careers. The stark reality is that a disproportionate number of people of color, particularly Black and Latinx persons, are even further away from becoming STEM-literate and having the ability to thrive in a hyper-competitive, global marketplace. The nation has persistent inequities in access, participation, and success in STEM subjects that exist along racial lines, which threaten the nation's ability to close education and poverty gaps, meet the demands of a technology-driven economy, ensure national security, and maintain preeminence in scientific research and technological innovation. If the U.S. wants to maintain its' status as a global leader in STEM, be competitive in the STEM space, and address global challenges; diversifying the STEM education to career pathway must be a take precedence. STEM and diversity are integral to the sustainability of our schools, the innovation of our businesses, the prosperity of communities and the global competitiveness of our economies. IMSA has acknowledged racially based STEM equity gaps in its Equity and Excellence Policy long-term outcome. Thus, an Equity and Excellence Plan will assist IMSA in developing a more diverse, STEM-literate workforce who are truly solving the world's problems through an equity-minded frame, ultimately achieving the tasks put forth in the policy. [5]

A focus on diversity, equity and inclusion in relation to STEM is trending on both a national and international scale, in education, business, and independent sectors. As IMSA continues to situate itself globally, as students are preparing to solve the global problems of the world, as our alumni serve as leaders in an array of entities throughout the world, it is imperative that IMSA is strategic to ensure equity and excellence.

Sources:
[1] *National Association of Diversity Officers in Higher Education Standards of Professional Practice for Chief Diversity Officers*
[2] *UNESCO: Education Transforms Lives*
[3] *The Danielson Groups: The Framework's Common Themes*
[4] *Great Lakes Equity Center – Every Child, Every Day Institute: Culturally Responsive and Sustaining Practices in the Classroom*
[5] *D-STEM Equity Model: Diversifying the STEM Education to Career Pathway*

Theory of Change Findings

This section will share the themes related to assumptions, pre-conditions and strategies that emerged for each intermediate outcome from the Theory of Change – Phase 1 survey. It will also provide you with the rankings for each Theory of Change element by intermediate outcome, reported during Phase 2 of the process. Participants were asked to choose the top five themes they most agree with in each area, for each outcome, and then to rank them, with five being the most important/relevant and one being the least important/relevant. For some areas, fewer than five themes emerged, and thus, participants were asked to rank them all. The ranking scale begins with zero and the end number is derived from the number of respondents multiplied by the highest possible ranking given. Keep in mind that respondents may not have completed the ranking sequence and some may have opted out, due to disagreement with some or all themes. In addition, the number of respondents may vary for each intermediate outcome, as groups were only asked to respond to the ones' most aligned with their respective departments/team.

The chart below depicts the departments/teams that responded to each intermediate outcome:

The 7 Equity & Excellence Policy Outcomes	IMSA Department/Team Participants
Developing and using an equity lens when considering major policies, programs, practices, or decisions in order to realize more equitable outcomes.	*SLT, OIR, OPA, Admissions, Student Life, Residence Life, IRC, IN2, HR, Residence Life, CAC, CTL, Security, Strategies, SIR, Facilities, IT, ITMC, CAL*
Implementing strategies to recruit support and retain Culturally, Linguistically and Economically Diverse groups and support and retain Marginalized groups.	*SLT, OIR, OPA, Admissions, Student Life, IRC, Residence Life, CAC, Security, Strategies, CAL*
Providing professional learning that continuously develops the Cultural Competence and equity awareness of staff, including faculty, as well as board members and external partners.	*SLT, OIR, OPA, Student Life, IN2, HR, Residence Life, CTL*
Supporting research, scholarship and innovative expression of staff, including faculty as well as external partners that either address or promote the Equity and Excellence Model.	*SLT, OIR, OPA, IRC, IN2, CTL, SIR*
Implementing strategies based on the Equity and Excellence Model to recruit, support and retain staff, including faculty, as well as board members and external partners.	*SLT, OIR, OPA, HR*
Differentiating resources as necessary to provide every student with access to Culturally Competent pedagogy, curriculum, co-curriculum, support, facilities and other educational resources with an ultimate goal of achieving Excellence.	*SLT, OIR, OPA, Student Life, IRC, IN2, CAC, CTL, Strategies, SIR, Facilities, IT, ITMC, CAL*
Addressing Culturally, Linguistically and Economically Diverse and gender-based STEM education/career gaps by developing student and professional programs and services, as well as conducting research, that will inform strengthening and diversifying the STEM education to career pipeline.	*SLT, OIR, OPA, IN2, CTL, SIR*

The following pages include the top three assumptions, pre-conditions, and strategies, by level of importance, agreement, or priority for each Equity and Excellence Intermediate Outcome.

Equity and Excellence Policy Intermediate Outcome #1:

*Developing and using an equity lens when considering major
policies, programs, practices, or decisions in order to realize more equitable outcomes.*

The IMSA community is well aware of the positions in place focused on moving diversity, equity and inclusion forward. With this in mind, the IMSA community believes that they possess the skills and knowledge to move Equity and Excellence forward. At the same time, the community believes that IMSA is not welcoming, there are disengaged employees and a mistrust between faculty/staff and administration exists that impedes moving equity forward. To move this work forward, an institutional expectation must be communicated, along with enhanced transparency/visibility from IMSA administration. In addition, evidence of equities need to be brought to light, to gain institutional support and ultimately inform equity-based practices. Through addressing barriers, equity-focused professional learnings and creation of a related communication protocol, the capacity to use an equity lens may be developed, assisting in the achievement of this intermediate outcome focused on an equity lens.

Below is a snapshot of the highest ranked and most agreed upon assumptions, pre-conditions, and strategies that emerged from the Theory of Change process:

Theory of Change Elements	Theme	Rank Score	# agreed
		Scale (0 - 565)	n=113
Assumptions *conditions or resources that already exist*	IMSA has a Chief Equity Officer, Director of Diversity, Equity and Inclusion, and a diverse Cabinet and Senior Leadership Team.	295	79 (70%)
	The institution possess individuals who have the skills and fortitude to push this work forward, but the environment is not always welcoming.	258	87 (77%)
	The current environment is not conducive to achieving this outcome because of the degree of distrust between faculty/staff and administration, which makes many understandably suspicious of even well intended outcomes.	227	76 (67%)
		Scale (0 - 565)	n=113
Pre-Conditions *barriers or necessary conditions to achieve outcome*	Need to make it clear that equity and excellence is an institutional priority.	320	97 (86%)
	Provide evidence of inequities that exist at IMSA to gain support and address related concerns.	316	105 (93%)
	More transparency/visibility/involvement from IMSA Administration.	310	91 (81%)
		Scale (0 - 432)	n=108
Strategies *barriers or necessary conditions to achieve outcome*	Develop an Equity and Excellence policy communication protocol that includes professional learning on related language/terminology within the policy to create common understanding, the value of equity, and related expectations, led by IMSA cabinet and Senior Leadership team members.	318	105 (97%)
	Introduce and encourage equity-mindedness in State of Illinois educational systems.	273	106 (98%)
	Enhance employee engagement in Equity and Excellence initiatives through incentives, on-going dialogue and connection to performance goals, expectations and evaluations.	262	101 (94%)
	Ranking scale begins with 0 and the end number is derived from # of respondents multiplied by the highest possible ranking given.		

Equity and Excellence Policy Intermediate Outcome #2:

Implementing strategies to recruit, support, and retain Culturally, Linguistically
and Economically Diverse groups as well as support and retain Marginalized groups.

Most respondents agreed that IMSA Admissions works diligently to attract diverse applicants and once enrolled, IMSA is a supportive environment for all cultures. There are programs in place to provide academic, identity, and social-emotional support(s). However, to adequately recruit, support and retain CLED and historically marginalized groups, it was strongly agreed upon that IMSA needs to create a welcoming, inclusive environment, diversify faculty, and make equity an institutional priority. Through targeted recruitment initiatives, building upon and developing personalized plans of support, and continuing to use data to assess need, this outcome to recruit, support and retain CLED and marginalized groups may be achieved. IMSA students weighed in on this outcome, putting forth these specific strategies to provide on-going support to students:

Support	
Need more Cultural Club advisors with similar backgrounds	Host Courageous Conversations in the Classroom
Address inequity associated with internet shut-off policy	Encourage cultural conversations without the political undertone, especially in the classroom
Effective communication around resources for students from lower socioeconomic backgrounds for intercession, t-shirt purchases, payment of student fees, etc.	Create support plan for CLED students including, academic assistance, safe spaces and social activities, SIR engagement, involvement in leadership roles, & hiring more diverse faculty
Create support plan for students who identity as part of the LGBTQIA+ Community, especially around use of pronouns and gender identity	Change the scenario about CLED students' academic potential - *Intelligence and self-worth is determined by Math Placement."*
Change the narrative that IMSA is "college prep" - *"CAC's aren't focusing on learning for the sake of learning but on getting into college."*	- *"Mission is holistic, but emphasis is on intelligence…how can we broaden our sense of achievement and accomplishment."*

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Below is a snapshot of the highest ranked and most agreed upon assumptions, pre-conditions, and strategies that emerged from the Theory of Change process:

Theory of Change Elements	Theme	Rank Score	# agreed
		Scale (0 - 430)	n=86
Assumptions *conditions or resources that already exist*	Academic supports are in place for students.	282	79 (92%)
	Admissions is working hard to try to get a larger applicant pool, which should increase the probability of attracting diverse.	246	71 (83%)
	Overall, the IMSA environment is supportive of diverse.	234	72 (84%)
		Scale (0 - 261)	n=87
Pre-Conditions *barriers or necessary conditions to achieve outcome*	Create a welcoming, inclusive environment.	189	86 (99%)
	Diversify faculty.	169	85 (98%)
	Create an environment in which there is an institutional expectation to support recruitment efforts.	150	83 (95%)
		Scale (0 - 430)	n=86
Strategies *barriers or necessary conditions to achieve outcome*	Create opportunities of social-emotional support for students.	209	73 (85%)
	Focus outreach where our CLED audience lives.	190	65 (76%)
	Examine our equity-related data, poll our students, and genuinely listen to them about what they need and then design specific next steps that will make this a safe and inspiring community for all of our students.	190	59 (69%)
	Ranking scale begins with 0 and the end number is derived from # of respondents multiplied by the highest possible ranking given.		

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Equity and Excellence Policy Intermediate Outcome #3:

Providing professional learning that continuously develops the Cultural Competence
and equity awareness of staff, including faculty, as well as board members and external partners.

The respondents agree that there are individuals at IMSA with the expertise to move Equity and Excellence forward, and that the community is open to learning and have been engaged in DEI related professional learning. It was strongly suggested that in order to effectively implement DEI professional learning, IMSA must first create an open-minded, safe and comfortable environment that is conducive to such learning. In addition, it was suggested that a more strategic approach to professional learning be developed, which potentially entails having it occur more than once per year, engaging smaller groups, providing adequate time with actionable items, utilizing an asset-based and discipline specific approach, as well as possess elements for autonomous and self-directed and provide a framework to engage in on-going department/discipline level conversations. Applying these suggestions may assist in providing professional learning that develops Cultural Competence and equity awareness.

Below is a snapshot of the highest ranked and most agreed upon assumptions, pre-conditions, and strategies that emerged from the Theory of Change process:

Theory of Change Elements	*Theme*	*Rank Score*	*# agreed*
		Scale (0 - 325)	*n=65*
Assumptions *conditions or resources that already exist*	The institution possesses individuals who have the skills and fortitude to push this work forward, but the environment is not always welcoming.	146	46 (70%)
	Office of Diversity, Equity and Inclusion provides professional learning opportunities.	144	43 (66%)
	Professional learning is too general and surface-level, does not include practical application.	117	40 (62%)
		Scale (0 - 315)	*n=63*
Pre-Conditions *barriers or necessary conditions to achieve outcome*	Create an environment that is conducive to the achievement of this outcome of professional learning.	192	54 (86%)
	Create a strategic approach to professional learning.	162	50 (79%)
	Create a culture in which departments are having conversations about equity, cultural competence and related topics on a regular basis.	154	53 (84%)
		Scale (0 - 252)	*n=63*
Strategies *barriers or necessary conditions to achieve outcome*	Create a strategic approach to professional learning.	183	59 (94%)
	Survey groups to understand what kinds of assistance they need to personalize professional learning.	160	60 (95%)
	Have discipline-specific professional learning.	149	61 (97%)
	Ranking scale begins with 0 and the end number is derived from # of respondents multiplied by the highest possible ranking given.		

Equity and Excellence Policy Intermediate Outcome #4:

Supporting research, scholarship and innovative expression of staff, including faculty as well as external partners that either address or promote the Equity and Excellence Model.

As reported, IMSA seems to have an abundance of resources to support research, scholarship and innovative expression. It was discussed that IMSA's Digital Commons and Facebook have been platforms to share related research, scholarship and innovative expression. To build upon and add to contributions, IMSA needs to create a supportive culture and build the capacity of faculty, staff and student to engage in said activities. There needs to be a plan to support faculty/staff engagement in global and DEI-focused research, scholarship and innovative expression. This includes funding, work release and other incentives, such as the utilization of Digital Commons to create a professional/student portfolio. SIR should be considered as a course offering to increase student engagement. IMSA should advertise grants and other available funding sources to encourage engagement, as well as identify faculty/staff who are currently conducting related research for collaborative purposes. Integrating these recommendations can assist IMSA in supporting research, scholarship and innovative expression.

Below is a snapshot of the highest ranked and most agreed upon assumptions, pre-conditions, and strategies that emerged from the Theory of Change process:

Theory of Change Elements	Theme	Rank Score	# agreed
Assumptions *conditions or resources that already exist*		Scale (0 - 170)	n=34
	Faculty, staff and students have the opportunity to submit scholarly works to Digital Commons.	94	26 (76%)
	IMSA has an SIR program where a student could partner with a faculty or staff member to look into research and scholarship.	79	22 (65%)
	There is an IN2, Center for Innovation and an Office of Institutional Research.	62	21 (62%)
Pre-Conditions *barriers or necessary conditions to achieve outcome*		Scale (0 – 99)	n=33
	Create a culture that promotes research, scholarship and innovative expression.	63	27 (82%)
	Provide funding to support sharing of research, scholarship, and innovative expression.	55	29 (88%)
	Create a community that has the capacity to conduct research, create innovative expression and engage in scholarship.	55	27 (82%)
Strategies *barriers or necessary conditions to achieve outcome*		Scale (0 - 136)	n=34
	Funding should support research, scholarship and innovative expression.	96	31 (91%)
	Support faculty/staff in conducting equity-focused research, scholarship and innovative expressions by allowing academic freedom.	80	29 (85%)
	Identify the faculty/staff who have related backgrounds and have conducted related studies, then have them collaborate on conducting an IMSA focused equity study.	75	31 (91%)
	Ranking scale begins with 0 and the end number is derived from # of respondents multiplied by the highest possible ranking given.		

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Equity and Excellence Policy Intermediate Outcome #5:

> *Implementing strategies based on the Equity and Excellence Model to recruit, support and retain staff, including faculty, as well as board members and external partners.*

It was reported that IMSA is becoming more diverse, specifically with the hiring of Black and Latinx staff, mentioning the diversity of Cabinet. As suggested in emergent themes, this is possibly a result of the Human Resource Department understanding the value of diverse faculty and staff. However, it was actually implied that we should not have this focus on diverse hiring, instead focus on hiring "the best candidate", put this way "*having a diverse background within your faculty/staff is important and a wonderful addition to any workplace, it is even more important to have highly qualified individuals in these positions.*" Despite this philosophical conflict, to achieve this outcome of recruiting, supporting and retaining staff, including faculty, IMSA must continue to build an inclusive and welcoming community that values diversity and the contributions that diverse individuals bring. Regarding recruitment, there must be targeted initiatives to increase diversity in the applicant pools. There should also be a focus on hiring those who can demonstrate their application of DEI-related practices, indicated from responses to related questions during the interview process. It was further recommended that this process be conducted through blind-review, in an effort to eliminate bias.

Below is a snapshot of the highest ranked and most agreed upon assumptions, pre-conditions, and strategies that emerged from the Theory of Change process:

Theory of Change Elements	*Theme*	*Rank Score*	*# agreed*
Assumptions *conditions or resources that already exist*		*Scale (0 - 100)*	*n=20*
	IMSA's HR department understands the value of a diverse staff and faculty.	51	14 (70%)
	Our staff are becoming more diverse, with gains in Black and Latinx proportions of the staff at all levels.	46	14 (70%)
	We want the best candidate.	44	12 (60%)
Pre-Conditions *barriers or necessary conditions to achieve outcome*		*Scale (0 - 100)*	*n=20*
	Create a diverse, inclusive and welcoming environment.	54	17 (85%)
	Change mindset that diverse candidates are incompetent.	52	16 (80%)
	Create more diverse applicant pools.	50	16 (80%)
Strategies *barriers or necessary conditions to achieve outcome*		*Scale (0 - 100)*	*n=20*
	Develop a recruitment and retention plan, inclusive of representation goals	45	14 (70%)
	Implement a blind-review hiring process to disrupt bias.	42	12 (60%)
	Hire individuals who believe, demonstrate and live diversity.	41	14 (70%)
	Ranking scale begins with 0 and the end number is derived from # of respondents multiplied by the highest possible ranking given.		

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Equity and Excellence Policy Intermediate Outcome #6:

> *Differentiating resources as necessary to provide every student with access to Culturally Competent pedagogy, curriculum, co-curriculum, support, facilities and other educational resources with an ultimate goal of achieving Excellence.*

While IMSA has individuals vested in and possess the capacity to bring about educational equity, the environment is not always supportive of the achievement of equity. Some indicated there is a lack of focus on Culturally Responsive Pedagogy in the classroom, which could assist in achieving equity. This is possibly a result of the distrust between faculty and administration, put this way, *"the current environment is not conducive to achieving this outcome because the degree of distrust between faculty and administration makes many faculty members understandably suspicious of even well-intended outcomes."* Simultaneously and in alignment, IMSA needs to create an environment that values educational equity, while examining, understanding, and addressing academic inequities. In addition, a common understanding of Equity and Excellence Policy related definitions needs to occur, along with the creation of a vision of what equity looks like in practice. To achieve equity through differentiation, it was suggested that IMSA create a data-informed system to ensure equity. Considering these suggestions can assist in the development of equity-mindedness in teaching and learning through differentiation.

Below is a snapshot of the highest ranked and most agreed upon assumptions, pre-conditions, and strategies that emerged from the Theory of Change process:

Theory of Change Elements	*Theme*	*Rank Score*	*# agreed*
Assumptions *conditions or resources that already exist*		*Scale (0 - 390)*	*n=78*
	IMSA possesses individuals who have the skills and fortitude to push this work forward, but the environment is not always welcoming.	188	57 (73%)
	Departments and Programs use strategies to implement the new Equity and Excellence policy.	171	57 (73%)
	Distrust between faculty and administration causes suspicion and creates a barrier to achieving outcome.	165	53 (68%)
Pre-Conditions *barriers or necessary conditions to achieve outcome*		*Scale (0 - 375)*	*n=75*
	Create an environment in which people see this work as value and not a burden.	235	67 (89%)
	Create a common understanding of what cultural competence looks like in practice and provide related professional learning.	201	63 (84%)
	Understand and address the academic inequities by race, gender, and socioeconomic status.	185	55 (73%)
Strategies *barriers or necessary conditions to achieve outcome*		*Scale (0 - 308)*	n=77
	Create systems to ensure that practices are equitable and support all learners and staff/faculty members and that everyone's voice is heard.	221	64 (83%)
	Bring balance and equity-mindedness to teaching and learning.	190	66 (86%)
	Provide equity related data to inform teaching and learning practices.	179	63 (82%)
	Ranking scale begins with 0 and the end number is derived from # of respondents multiplied by the highest possible ranking given.		

Equity and Excellence Policy Intermediate Outcome #7:

> *Addressing Culturally, Linguistically and Economically Diverse and gender-based STEM education/career gaps by developing student and professional programs and services, as well as conducting research, that will inform strengthening and diversifying the STEM education to career pipeline.*

It was reported that research, rooted in Critical Race Theory, has occurred at IMSA to address racially based STEM equity gap, which resulted in the development of the D-STEM Equity Model, shared nationally and globally. It was further reported that IMSA has programs in place that too are addressing the STEM equity gap. Although these programs exist, they seem to lack discussion about the array of STEM careers that exist. Through these programs, to increase retention in STEM education and careers, students must learn to confront the bias that exists, possibly through stereotype management. These programs, to address STEM inequities, should be a multi-year online + hybrid pathway program that is culturally responsive and scalable. Being that the Center for Teaching and learning has reach beyond IMSA, it was suggested that the STEM equity educational programs be shared with students throughout Illinois, nationally, and globally.

Below is a snapshot of the highest ranked and most agreed upon assumptions, pre-conditions, and strategies that emerged from the Theory of Change process:

Theory of Change Elements	Theme	Rank Score	# agreed
Assumptions *conditions or resources that already exist*		*Scale (0 - 140)*	*n=28*
	The reach of the Center of Teaching and Learning extends across the State, allowing access to more students of diverse backgrounds	98	25 (89%)
	Racial and gender-based STEM inequities are being addressed in IMSA programs.	88	27 (96%)
	Students are rarely informed about the array of STEM careers and pathways that exist.	68	24 (86%)
Pre-Conditions *barriers or necessary conditions to achieve outcome*		*Scale (0 - 135)*	*n=27*
	Need to attract students that are more diverse and ensure they feel safe.	81	22 (81%)
	Address, confront and disrupt the racial and gender bias that exists in STEM education and careers.	75	24 (89%)
	Examine the impediments that lead to CLED / gender gaps in STEM fields. Only then can we begin to address them.	73	23 (85%)
Strategies *barriers or necessary conditions to achieve outcome*		*Scale (0 - 140)*	*n=28*
	IMSA Center for Teaching and Learning needs to have more representation across the State of Illinois.	92	27 (96%)
	Develop a multi-year online + hybrid pipeline program to identify CLED students in elementary schools, and involve them in STEM pathway education programs.	88	24 (86%)
	The value of diversifying STEM and STEM equity to solve the problems of the world needs to be communicated and shared within and beyond IMSA.	73	25 (89%)
	Ranking scale begins with 0 and the end number is derived from # of respondents multiplied by the highest possible ranking given.		

Conclusion

This report has provided a thorough analysis of the data from the Theory of Change process, implemented to inform the development of the Equity and Excellence plan for the Illinois Mathematics and Science Academy. A rationale justifying the value of IMSA moving forward with an equity-focused agenda was discussed. Long and intermediate outcomes, extracted from IMSA's Equity and Excellent Policy were presented, serving as the foundation in this Theory of Change process. For each intermediate outcome, emergent assumptions, pre-conditions and strategies were communicated, and then as part of a modified focus group process, ranked and prioritized. It is highly recommended that the reported Theory of Change findings are examined and inform the Equity and Excellence plan development, as they are intentionally reflective of the voice of the IMSA community, staff, including faculty and students.

While some of the assumptions were positive about IMSA's Equity and Excellence priority, there were definitely some that suggested our current environment is not conducive to its' achievement. Thus, it is suggested that IMSA continues nurturing, implementing, and assessing those areas that were reported as valuable resources. It is further recommended that additional exploration occur around the areas that were identified as lacking, inadequate or problematic. Regarding the pre-conditions, it is suggested that additional research occur to better understand respective barriers, and strategically address each to ensure outcome achievement. Many of the strategies that emerged align with their respective pre-conditions. Based on priority, as determined in the Theory of Change Modified Focus Group, along with the reality of implementation, measurability, and long-term outcome achievement, it is highly recommended that IMSA examine strategies put forth in each of the respective intermediate outcome areas, and once determined plausible, adopt as part of the Equity and Excellence Plan.

Based on patterns evident between the various themes (assumptions, pre-conditions, strategies) that emerged within and throughout the immediate outcomes, it is recommended that these ten specific strategies be included in IMSA's Equity and Excellence Plan:

1. Provide discipline/department specific professional learning opportunities, focused on developing cultural competence and equity-mindedness, not just in theory, but in practice as well. It should provide a framework for on-going related dialogue within the group, as well as possess elements for autonomous and self-directed learning.

2. Provide faculty and others who develop and implement curriculum with professional learning on Culturally Responsive Pedagogy, beyond theory, inclusive of practical application strategies and techniques.

3. Provide on-going assistance to disciplines/departments in assessing, developing, implementing and evaluating current/new programs, services, practices, policies, and resources, through IMSA's equity lens.
    a. What is the intent behind the decision/practice?
    b. What social constructions does this decision/practice embrace?
    c. Who benefits from the way things are and who does not?
    d. What actions will address the inequities we see in this decision/practice?
    e. To what extent does the decision/practice identify specific student groups (and is responsive to) those who have been.

4. Develop an Equity and Excellence policy communication protocol on Equity and Excellence related language/terminology within the policy to create common understanding, share the value of equity, and put forth related expectations, led by IMSA Cabinet and Senior Leadership Team members.

5. Develop a diversity-focused recruitment and retention plan, inclusive of representation goals, that involves building relationships with targeted organizations such as HBCU's and HSI's.

6. Develop a comprehensive student DEI education program with elements that occur in both academic and student affairs, including the examination of STEM inequity and having DEI Courageous Conversations, both inside and outside the classroom.

7. Rooted in differentiation, create academic, identity and social-emotional support plans for CLED students, members of LGBTQIA, + community, and other marginalized group(s), identified by need.

8. For both recruitment purposes and to address STEM inequities, develop a multi-year online + hybrid pathway program that is culturally responsive as well as scalable, to be shared locally, nationally, and globally.

9. Continue to collect and share data that assesses ongoing equity-related issues, measures the current diversity and inclusion climate, indicates progress in respective DEI areas, and ultimately measures the achievement of Equity and Excellence Intermediate and Long-term Outcome(s).

10. Support and encourage faculty, staff and students in conducting equity-focused research, scholarship and innovative expression, promoting Digital Commons as a tool to build their professional/student portfolio.

Hopefully this report was viewed through an equity-minded lens, *"the data-driven outlook and perspectives that call attention to patterns of inequity in access, outcomes and retention as institutional problems, in an effort to develop systemic strategies within the control of the Academy that address these inequities."* If not, it would be of value to review this document again, and through that lens. Then, utilize this report as a fragment of that data, which has provided an in-depth, comprehensive view of the educational value of equity work, equity-focused resources currently in place, the barriers to moving equity forward, as well as proposed strategies to address respective equity-related issues, to inform the development of IMSA's Equity and Excellence Plan.