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Who Do We Think We Are? Designing a Higher Education Inclusive Excellence Audit Tool for Review of Communication Materials

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for Review of Communication Materials

Abstract

As higher education institutions focus on improving and conveying our commitments to inclusive excellence, it becomes necessary to self-assess our communications. This work describes the development and pilot testing of a simple tool to assess the inclusive excellence of print or electronic materials produced at any scope – from individual department or unit through institution-wide uses. The tool considers several areas of inclusivity at once, allowing stakeholders to identify strengths and weaknesses in their communications and move towards continuous improvement.

Introduction

In season 4 of the hit American sitcom *Modern Family*, an episode shows high school student Haley Dunphy looking at her incoming mail. "Another brochure from the community college," she says. "At least this one doesn't have that fake-y lunchtime shot of the Black guy, Asian girl, and an Indian…oh wait. There it is! Wow, that wheelchair kid is really cracking everybody up" (Mancuso, 2012). When our marketing materials in higher education become so formulaic as to become a punchline in a sitcom, we know we should do better. But beyond images shared with prospective students, what does inclusivity really mean at the heart of an institution?

Many in higher education have become increasingly aware of the need to ensure that campus environments – physical and virtual - are accessible and welcoming to all. Williams et al. (2005) define the need for inclusive excellence, explain theories of organizational change, and map out ways that an inclusive excellence scorecard can drive improvements. Yet as illustrated in the type of brochure sent to Haley Dunphy, the means by which our institutional stories are told extends beyond admission considerations. This manuscript describes the design of a tool to

assess the inclusive excellence of print and electronic media. It can be used by a variety of units at any institution to identify areas for improvements in inclusivity.

Inclusive excellence encompasses many areas of equity and is not easily encapsulated in one common definition. To truly promote inclusive excellence, institutions must also establish measures and metrics across multiple dimensions to hold themselves accountable. How we represent ourselves matters, including but not limited to: inclusive and equitable marketing and branding efforts, advertisement of support services for underrepresented/underserved populations, recognizing the contributions of people from diverse populations, inclusive and equitable development/fundraising practices, and communication to multiple internal and external stakeholders.

The Need for Inclusive Communications

Higher education communication strategies encompass a variety of methods and media, including not only photos, graphics, color, images, audio, video, websites, and social media, but also reports, documents, and newsletters. In addition to regular business functions, institutions of higher education also maintain missions related to education, research, extension, service, archives, and/or dissemination of knowledge worldwide. In the teaching space, students are frequently producing reports to convey information, and they are often sharing these with a wider audience.

Despite the identified importance of inclusive communication strategies, there are few broadly accessible published means to assess available communication materials and identify areas for improvement. As communication strategies become deployed more widely, there are often those without disciplinary media training who are also producing and propagating

materials. When institutions do assess for inclusive excellence, they often use the lens of employment practices and infrastructure rather than more common communications (Bensimon, 2004; Diaz & Kirmmse, 2013). Accessibility guides may also be widely available (*Section508.Gov*, n.d.; Taylor & Firth, 2023), but these guidelines are not always widely adopted across institutions to ensure compliance, and some content creators might not be aware of them. Furthermore, there is no readily available tool that allows users to assess *all* aspects of inclusive excellence at one time and that is designed for content creators from multiple backgrounds and skill levels.

The authors believe that a comprehensive material review tool should go beyond accessibility checkers to also prompt examination of institutional climate and infrastructure. This tool should be useful to any unit on campus, and ideally would address multiple representations of diversity and accessibility at the same time. Equity scholar Jamila Dugan states "Equity isn't a destination, but an unwavering commitment to a journey" (Dugan, 2021). Likewise, inclusive excellence is not a destination; it is a process. Once a baseline is established, this tool could be used as frequently as possible for continued reviews and to propagate continuous improvements.

Designing an Inclusive Excellence Audit Tool

The authors ensured that multiple sources were considered when designing and testing a communication audit tool, including traditional journals and publishing guides (AAC&U, 2015; Canadian Urban Libraries Council, 2010; Hunt, 2018; Rutgers University, 2020; Stachl et al., 2021) as well as institutional and business websites (Center for International Studies, n.d.; Clayton-Pederson et al., 2013; Diaz & Kirmmse, 2013; Knifong, n.d.; Parker, 2020; Tiwari, 2020; Treviño et al., n.d.; Tu, n.d.). Questions were organized to make the tool user-friendly, so that it can be used by reviewers with different experience levels, across sectors, and in different

industries to review items such as websites, documents, reports, and social media accounts. Table 1 provides an overview of the questions in the inclusive excellence audit tool.

The finalized tool has a mixture of free response and multiple-choice questions. We created the inclusive excellence audit tool in Qualtrics (Qualtrics, 2021) so that there is a simple web link available to share and responses can be emailed back to the reviewer. The tool begins with a definition of inclusive excellence from the host institution, Clemson University, along with a brief description about why conducting reviews is important and what the reviewer's lens should be. Although quantitative questions are present, reviewers are asked to consider that quantity does not always equal quality. The frequency by which topics appear in materials allows reviewers to report to authors on potential topics they have missed, but a frequency report is not a quality statement on the depth at which the topics are discussed in the materials.

After asking the name and contact information of the reviewer, the audit tool asks for the date of current review and expected date of the next review. This helps serve as a reminder of the need for continuous review. The first set of questions (Part A of Table 1) repeats for the number of materials being audited and are designed to facilitate focus on each material individually. There are questions about the intended audience, the language of the material, the diversity of the material with explicit reminders about the potential for intersectionality, the accessibility of the material with instructions on how to check this if it is not known, the accuracy of the information presented in the material, and summary questions. At the end of each area of questions, there is a free response textbox where reviewers can leave additional comments based on the review in that area. Once Part A is concluded for as many materials as being reviewed, the tool directs the reviewer to a summary section (Part B of Table 1) to complete a series of questions about the unit or the materials as a whole based upon what the reviewer has experienced. These questions

are reflective and ask the reviewer about patterns they may have noticed and suggestions they

have for improvement. Reviewers are asked to give an overall rating of the unit's inclusive

excellence efforts that could be helpful when follow-up reviews occur.

Table 1. Inclusive Excellence Audit Tool	
Part A: For Individual Materials (Websites or Website Pages, Social Media, Reports, Newsletters, etc.)	
Area	Questions for Review and Response
Intended Audience/ Language	- Who do you perceive as the intended audience? - To what extent is any technical language or jargon used appropriate for the intended audience? - To what extent is the tone appropriate for the situation and intended audience? - Do you have a clear understanding of the materials?
Diversity	- Does the material portray any group as "norm" or "outsiders"? - Do any of the following keywords and/or the names of specific groups, events, or resources for those groups appear in the materials? If so, please indicate the frequency. Try to be mindful of the potential for intersectionality, where individuals may belong to or identify with more than one demographic group. - Culture/ Intercultural - Disability - Diverse/ Diversity - Ethnicity - Gender or gender fluidity - Identity - Religion - Inclusion - Race - Sexual Identity - Socioeconomic - Veteran - Feel free to add your own: - For the question above, to what extent were specific groups mentioned integrated into the materials? - If the material has images, are they appropriate? Do the images make sense for material? Do they represent a diverse group of people?

Accessibility	• Are documents compliant with screen readers? For those with color-blindness or other visual accessibility needs? [Note: This question has instructions of basic ways to check accessibility and directs reviewers an accessibility checker.] • Are videos closed captioned and/ or have a transcript provided?
Accuracy of Information	• Are there policies, practices, and/ or resources that are missing that should be presented? • To what extent is the information presented up-to-date and accurate (ex: contact information, links still work, etc.)?
Summary	• Give the material an overall inclusive excellence rating based upon your review. (0: low level of inclusive excellence, 100: exceptional level of inclusive excellence)
Part B: Summary Questions After Reviewing Individual Materials	
Area	Questions for Review and Response
Intended Audience	• What do the materials reveal about attitude towards the intended audience?
Language	• What would the reader learn from your materials? What patterns did you notice? Is there anything that is surprising?
Diversity	• Think about any real or portrayed disparities or inequities. How might the content of the materials and the way the content is presented perpetuate or alleviate gaps? What should be changed?
Accuracy of Information	• Are there any policies or procedures that are left out or that should be revised?
Summary	• Give the unit's materials an overall inclusive excellence rating based upon your review of all of the materials. (0: low level of inclusive excellence, 100: exceptional level of inclusive excellence) • What additional recommendations do you have for improvement?

Pilot Testing the Inclusive Excellence Audit Tool

Once the tool was developed, seven pilot testers were recruited from stakeholders across Clemson University. This group was comprised of two graduate students, three undergraduate students, and two staff members. They represented a variety of areas of campus and levels of expertise in inclusive excellence. This sampling of testers allowed for a variety of perspectives and experience levels to analyze how the tool might be used or adapted. The testers utilized the tool with the goals of providing: 1.) baseline inclusive excellence data for a sampling of

materials, 2.) an estimate of the time that it takes to conduct a review of materials, and 3.) feedback on the tool for clarity and process revisions.

An initial meeting was conducted with the testers to discuss the goals of the pilot test, to introduce them to the tool itself, and to provide them with the pilot materials for review. Pilot test materials included websites, social media handles, annual reports, and newsletters produced by a university-wide communications unit, a STEM college, and a student-focused academic unit. Reviewers were asked to audit as many of the materials as possible, with a minimum of one from each of three participating campus units.

After the reviews were conducted, the results were compiled to address the first goal (baseline inclusive excellence data for the units). Each material was audited by at least two testers. The initial results were similar for all three units, and testers provided comments to be used for baseline data and for suggested improvements in the materials that they reviewed. Results are summarized in Table 2.

The area of greatest concern for all testers was accessibility. Basic guidelines were included in the inclusive excellence audit tool so that reviewers had an idea of what to look for in the materials, and they were directed to an online accessibility guide for further details. The pilot team had suggestions for ensuring that images have proper alternative text, videos are captioned correctly, sites and documents are accessible to screen readers, and graphs and other visualizations do not rely on color alone to convey meaning.

The reviewers also found lapses in clarity when they stated concerns with jargon that was not understandable to the intended audience, ill-defined acronyms, and difficulty in navigating websites or documents. With regard to diversity, reviewers challenged creators to mention

holidays from a greater diversity of cultures, as the ones mentioned were American and/or Christian holidays. Reviewers also included a call to highlight campus opportunities available to underrepresented students.

Reviewers felt that the materials as a whole did represent a variety of voices and that images appropriately depicted Clemson's population. The pilot-test team did not find any inaccuracies in information but felt a question addressing inaccuracies is an important question to keep in the inclusive audit tool in the event that websites or other documents are not updated regularly or appropriately. Guidelines and policies frequently change, and individual documents are easily forgotten on websites or other channels, so regular reviews are a good way to check for accuracy.

Goal number 2 of the pilot test was to determine the amount of time needed to conduct a review of the materials. The testers indicated that they spent approximately 20 minutes per material to complete a thorough review, and they agreed that this was an appropriate amount of time. For Goal number 3, the pilot testers were asked to provide feedback on the audit tool for clarity and revision. All testers liked the survey-like format of the tool and the process and recommended that it stay the same for future use. They also recommended that in conducting the reviews in the future, it may be beneficial to have at least one internal reviewer from the unit producing the materials to more easily check for potential inaccuracies in the information that would not always be easily spotted by a more general review team.

The results of the pilot test were shared with each of the three units individually to help with their own inclusive excellence plans and benchmarks. The testers' suggestions for improvement of the tool focused on small edits and flow of the questions, which were incorporated into the final version.

Table 2. Results and Feedback from Pilot Test of Inclusive Excellence Audit Tool	
Area	Improvements Needed in Materials
Accessibility	• Alternate text for images is not always accurate and available • Concerns about the captioning on videos (inaccuracies, moves too fast, etc.) • Reports were not accessible with assistive technology such as screen readers • Graphs and information presented relying on color alone to express meaning, which could be difficult for color blind or visually impaired readers
Intended Audience/ Language	• Jargon used may not be fully appropriate for the audience • Not all acronyms are defined or easy to understand • Websites and documents are often unorganized or difficult to navigate
Diversity	• Identify holidays of a wider variety of cultures • Suggestion to highlight ways that the unit is focusing on providing opportunities for underrepresented groups • Reviewers commended on the presence of diversity in images as displayed by race, but felt that diversity in other avenues could be improved
Accuracy of Information	• No suggestions

Conclusion: Using the Findings and Sharing the Inclusive Excellence Audit Tool Widely

Because inclusive excellence, accessibility, and diversity are such complex topics, many reviews focus on a few components such as general diversity or accessibly. However, the inclusive excellence audit tool outlined in Table 1 has many major themes of inclusive excellence combined in one survey, encouraging users to think more comprehensively about inclusion and how we communicate it. In the process of conducting a review, the reviewer is challenged to examine different perspectives and has an opportunity to learn more about inclusion as part of the review process.

A common use will be for ensuring materials are accurate, serving their intended purpose, and are accessible and welcoming to all. Because many of the questions are reaction-

based, unit leaders should consider seeking a variety of reviewers each time to ensure bias limitation. Timelines of iterative review schedules should be planned accordingly.

The finalized tool as displayed in Table 1 is available to be used by anyone for inclusive excellence review needs. The Qualtrics format we created generates an automatic summary report ("give the unit's materials an overall inclusive excellence rating…" in Parts A and B of Table 1) that can be compiled as a measure of institution-wide growth. After the pilot phase, we found that multiple units, chairs, and directors have started using the tool, and several faculty members have expressed interest in using it to self-assess their syllabi and course materials. One of our campuses will be using the tool to analyze academic policies through an anti-racist lens, and the tool can be used in classes for students to peer review reports, presentations, and other documents created by their classmates.

In addition to campus-wide adoption, the tool is adaptable for anyone interested in assessing the inclusive excellence of their materials. We encourage readers and fellow equity champions to create their own versions based upon the questions in Table 1. Because there is no readily available industry standard to date for this kind of holistic assessment, the inclusive excellence audit tool has the potential to support sustained attention for improved inclusivity.

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