

National Leadership Grants for Museums

Sample Application MG-252057-OMS-22

American Alliance of Museums

Amount awarded by IMLS: \$740,320 Amount of cost share: \$758,122

The American Alliance of Museums will embed the principles of diversity, equity, accessibility, and inclusion (DEAI) into its fieldwide assessment and accreditation programs and related standards and ethics for museums. Project activities will include the assessment of existing programs and providing clear guidance and training for museum staff and volunteers associated with the programs. A research firm will analyze demographic and social factors of the programming to identify variances in program outcomes. A task force will use the results to recommend changes, which project staff and bodies such as the Accreditation Commission may incorporate into standards, peer reviewer training, and related assessment programming. The association will share progress through status reports, blog posts, and conference sessions. A project evaluation will provide a model for other organizations working through a multi-year, system-wide process to embed DEAI fundamentals at a structural level.

Attached are the following components excerpted from the original application.

- Narrative
- Schedule of Completion

When preparing an application for the next deadline be sure to follow the instructions in the most recent Notice of Funding Opportunity for the grant program and project category (if applicable) to which you are applying.

Project Narrative

Project Justification

The American Alliance of Museums (AAM) requests a \$742,319 National Leadership Grant (NLG) over three years to embed the tenets of diversity, equity, accessibility, and inclusion (DEAI) into its framework for fieldwide excellence and accreditation programs, and related standards and ethics for museum excellence across the nation. Recognized as the field's gold standard for museum excellence for 50 years, AAM accreditation signifies a museum's quality and credibility to the entire museum community, to governments and outside agencies, and to the museum-going public. AAM's excellence programs are considered by our 35,000 members to be the most important service we provide to the field.¹

To embed DEAI into the structure of museum excellence programming, AAM will: (1) assess each program to ensure there is a standard of equitable consideration applied in the review of the organizational and structural components of museums on the Continuum of Excellence, (2) guide museums to wide acceptance of DEAI as a principle of excellence, and (3) provide clear guidance and training for museum staff and volunteers associated with the excellence programs. We are honored to submit this proposal to the IMLS in alignment with the National Leadership Grant Goal 2, to "advance the museum field's ability to maximize the use of museum resources to address community needs through partnerships and collaborations." AAM proposes to develop this method to address the fieldwide challenge of advancing and embedding DEAI within the organizational structure of museums themselves, and will support the training and professional development programs, tools, or resources that build the knowledge, skills, and abilities of museum staff and/or volunteers to meet the needs of their communities. The number of professionals who access our ethics, standards, and professional practices resources each year is signficant, with 75,889 unique views to those sections of our website so far this year. With 5,065 museums currently engaging in pre-accreditation steps, 1,095 museums currently accredited, and approximately 125 museums engaging annually in the year-long MAP program, the impact of this proposal will be realized across the field of museums, and the communities they serve, for generations to come.

AAM Leadership in Diversity, Equity, Accessibility, and Inclusion (DEAI)

For the past five years, the American Alliance of Museums (AAM) has led the museum field in DEAI initiatives, responding to extensive and multi-year research that underscores the need for change among museum professionals, leaders, and the diverse publics they're intended to serve. Beginning in 2017, AAM partnered with BoardSource to examine museum board leadership and found a disconnect in the area of diversity, equity, accessibility, and inclusion. The survey revealed that nearly half (46 percent) of museum boards were entirely white, that 77 percent of museum directors believed racial and ethnic diversification of their boards was important to

Wilkening Consulting, 2021, AAM & Its Audiences. Unpublished internal report.

² BoardSource, 2017, Museum Board Leadership 2017: A National Report. https://www.aam-us.org/wp-content/uploads/2018/01/eyizzp-download-the-report.pdf.

advancing their own missions, but that only 10 percent of those same museum boards had developed plans of action to address those challenges. Another survey by the Mellon Foundation demonstrated that employment in the US museum sector does not reflect the makeup of the communities these institutions served.³

In the spring of 2017, following the launch of a new strategic plan and an AAM Annual Meeting & MuseumExpo devoted to the topic of DEAI, AAM convened a DEAI working group of 14 museum leaders representing a variety of disciplines, organizational sizes, types, regions, and perspectives, led by co-chairs Lonnie Bunch, Secretary of the Smithsonian Institution, and Elizabeth Pierce, President & CEO, Cincinnati Museum Center. For six months, this group examined the characteristics of effective museum inclusion practices and considered the nature of the steps the field could take to promote change at the individual, organizational, and fieldwide levels. Guided by James Baldwin's observation, "Not everything that is faced can be changed, but nothing can be changed until it is faced," the group issued a report, Facing Change: Insights from the American Alliance of Museums' Diversity, Equity, Accessibility, and Inclusion (DEAI) Working Group, 4 in which four areas of DEAI activity surfaced to advance fieldwide progress. The four major recommendations were to: (1) help build strong, inclusive, and equitable museum board cultures, (2) increase the capacity and number of trained DEAI practitioners within the museum field for individualized facilitation and work, (3) support museums in diversifying museum boards, and (4) address the structural components of the museum field with respect to museum excellence by embedding DEAI into the accreditation process.

The DEAI working group's first three (of four) recommendations were taken up in the 2019 launch of AAM's Facing Change: Advancing Museum Board Diversity & Inclusion three-year pilot program. Backed by generous grants from an unprecedented collaboration of three foundations (The Andrew W. Mellon Foundation, Alice L. Walton Foundation, and Ford Foundation), Facing Change set out to influence culture change at the leadership levels, where little to no DEAI work had previously been focused. Since museum boards set the tone and priorities, allocate organizational resources, and hold directors and CEOs accountable, it was critical for DEAI and culture change work to occur at the leadership levels in order to address issues of both structural racism and bias throughout individual museums.

Facing Change aimed to diversify museum boards by building out a strong pipeline of racially and ethnically diverse board candidates as well as a board-matching portal to help place them (Museum Board Connect), building the capacity of museum leaders and boards of trustees to create inclusive cultures, and building fieldwide capacity for embedding DEAI into museums by investing in the training of DEAI practitioners within the field (Senior Diversity Fellows). Facing Change worked with 50 museums across five different Museum Communities of

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³ Roger C. Schonfeld, Mariët Westermann, and Liam Sweeney, 2015, "Art Museum Staff Demographic Survey," The Andrew W. Mellon Foundation. https://mellon.org/programs/arts-and-cultural-heritage/art-history-conservation-museums/demographic-survey/.

⁴ American Alliance of Museums, 2018, Facing Change: Insights from the American Alliance of Museums' Diversity, Equity, Accessibility, and Inclusion (DEAI) Working Group, https://www.aam-us.org/wp-content/uploads/2018/04/AAM-DEAI-Working-Group-Full-Report-2018.pdf.

⁵ American Alliance of Museums. "51 Museums Selected for Board Diversity and Inclusion Program as Part of \$4 Million National Initiative." *American Alliance of Museums*, 27 Feb. 2020, https://www.aam-us.org/2019/07/23/51-museums-selected-for-board-diversity-and-inclusion-program-as-part-of-4-million-national-initiative/.

Learning (MCOLs) in Chicago, St. Paul/Minneapolis, the San Francisco Bay Area, the Dallas/Fort Worth/Houston region, and Jackson, Mississippi. To date, AAM has assessed and trained over 1,600 museum board trustees on the tenets of DEAI, ensuring trustees have collectively engaged in over four thousand hours of distance-learning and over two thousand hours of in-person training (pre-COVID). The results have been transformative for participants. "I truly believe that this work, and engaging in *Facing Change*, is the most important work of the board, in our lifetime," offered one Jackson-based trustee. "Being a relatively new board member (15 months), one of the major reasons why I joined this board was because I heard about the work being done around *Facing Change*."

The 2017 DEAI Task Force that sparked *Facing Change* considered the four levels of racism (and other forms of oppression) and how they operate. The four levels of oppression model has many iterations (sometimes referred to as the 4 I's of Oppression), but the ethos of the model and how it frames our understanding of racism has remained constant. The main tenet of the model is that the most common understanding of racism in our country is limited to the "personal" and "interpersonal" levels of racism—the personal prejudice and intentional bias in our individual interactions across different races. A different and more complex explanation of racism contends that interpersonal racism is actually a symptom of a more foundational system of racism, an array of cultural norms and institutional policies and practices that routinely produce racially inequitable outcomes—sometimes, and even often, without individual intent or malice. These we think of as the "organizational" and "structural" levels.

Guided by this framework, AAM's approach for the *Facing Change* program was to intervene directly at the personal and interpersonal levels to support the subsequent organizational and structural levels of work within an institution. In other words, trustees and museum leaders had to gain awareness of their biases and grow their intercultural competency in order to effect a culture change at their institution. Over the course of nearly three years working with the Facing Change museums, preliminary learnings (currently under assessment) include:

- While it is essential that individuals participating in DEAI work understand their own biases and how they impact the lens through which they see the world, the personal and interpersonal work to move them to behavior change needed much more space and time for reflection than originally conceived for the three-year pilot program. Program resources were almost exclusively allocated to this "direct service" in the end.
- When there are no accountability structures and working agreements built into collective or group work, behavior change is unlikely to occur of its own accord.
- Individuals can conceptualize how singular unconscious and/or overt acts of racism and oppression can create and perpetuate exclusion and inequality, but those individuals have a much harder time thinking about those concepts at the systems level.

When *Facing Change* began, there were fewer practitioners in the field to support this work. Nearly three years later, particularly following the murder of George Floyd, museums have much more support for individualized work. The Cultural Competence Learning Institute (CCLI),

⁶ Cuyahoga Arts & Culture, 2019, *Four Levels of Racism*, https://www.cacgrants.org/assets/ce/Documents/2019/FourLevelsOfRacism.pdf.

iPage, Of/By/For/All, and other independent consultants are increasing the field's capacity to undertake individualized journeys through DEAI committees and staff training. AAM plans to continue its work with the "direct service" or training model of *Facing Change* at the board leadership level, but this time-intensive work focused on the personal and interpersonal levels is not the only way, nor the most efficient way, AAM can advance DEAI in museums. As a fieldwide organization, AAM bears responsibility to assess DEAI at the organizational and structural levels, both for our own working practices and for all museums participating in our programming.

Following nearly two years of a global pandemic with associated economic and structural changes for museums, AAM is poised to help all museums recover and rebuild for equity. Therefore we take up the final recommendation of the original 2017 DEAI working group to "address the structural components of the museum field with respect to museum excellence by embedding DEAI into the accreditation process," and, more generally, into all programs on the Continuum of Excellence.

The Continuum of Excellence Supporting and celebrating your museum's commitment to standards **PLEDGE OF** CORE **MEMBERSHIP ACCREDITATION EXCELLENCE DOCUMENTS** The foundation A commitment A demonstration A mark of distinction for excellence to the field of professionalism from the Alliance and AZA MAP, StEPS and CAP Customized roadmaps for improvement

Fig. 1 AAM's Continuum of Excellence, which begins with membership and includes a pledge of excellence; the Museum Assessment Program, offering five unique assessments and customized roadmaps for various institution types; the Core Documents Verification program; and Museum Accreditation.

Excellence in DEAI Initiative

AAM's forthcoming *Excellence in DEAI* report picks up on the 2017 Task Force recommendation for "reviewing the AAM standards and excellence programs through an inclusion lens and recommending updates as needed" and carries it forward with additional insights from the broader community. While embedding DEAI best practices into museum practice is critical, DEAI Task Force members determined those changes would not be possible without AAM's support through changes to the Continuum of Excellence. The report makes clear that no matter where an institution is starting in their DEAI process, all institutions, not just some, need to come together as a collective in order to move DEAI work in the museum field forward.

While not an exhaustive "how-to" that fully addresses the unique circumstances of each museum, the report lays the groundwork that allows our field to establish a common set of **Core Concepts** and **Key Indicators** of excellence in DEAI. The Core Concepts outlined in the report serve as overarching themes of excellence in DEAI, while the Key Indicators are the tactical practices indicative of progress within each Core Concept. The indicators are designed to be broad, because AAM understands there is no one-size-fits-all approach to DEAI work. We believe that every museum should use these as guiding principles rather than a prescriptive checklist. Some museums will have progressed further along certain Core Concepts than others, while others will have specific DEAI challenges they need to prioritize.

The Core Concepts and Key Indicators were developed from the Task Force's research and recommendations; broad input obtained during listening sessions held during the 2019 and 2020 AAM Annual Meeting & MuseumExpo; feedback from multiple AAM stakeholders, including the Accreditation Commission; and direct input from AAM staff. The report notes areas for further exploration within AAM's Framework for Museum Excellence, including a stronger, more explicit integration of DEAI into both the AAM Code of Ethics for Museums and Core Standards in the years to come.

Ultimately, the Core Concepts and Key Indicators below will allow the field to orient around a shared purpose and direction toward which museums and museum professionals can align. The Core Concepts and Key Indicators are as follows:

Core Concept: DEAI is an ongoing journey without a fixed endpoint.

- **Key Indicator:** Take a holistic approach, integrating DEAI into all aspects of the museum's operations through a process of assessment, reflection, capacity-building, iteration, and measurement.
- **Key Indicator:** Publicly commit to the ongoing work of transforming organizational culture and dismantling systems of inequity within individual museums and the communities they serve, the museum sector, and society broadly.

Core Concept: DEAI demands an ongoing commitment of resources.

- **Key Indicator:** Provide budget training and financial resources for staffing, capacity-building, and internal or external DEAI expertise.

Core Concept: DEAI is the responsibility of the entire organization.

- **Key Indicator:** Adopt equity as a cornerstone of the museum's mission, strategy, values, management, and culture.
- **Key Indicator:** Embed responsibility and accountability for implementing DEAI policies and process into operations, job descriptions, and performance reviews at all levels of the institution, including the board of directors, C-level executives, senior leaders, middle managers, junior staff, and volunteers.

Core Concept: DEAI work must be measured and assessed.

- **Key Indicator:** Define the museum's equity goals as the elimination of identity-based disparities.
- **Key Indicator:** Measure progress by disaggregating data by identity over time.

By aligning on these Core Concepts and Key Indicators, AAM and the field will be well-positioned to start the critical work of embedding DEAI into the Continuum of Excellence programs, a pathway of standards-based programs including AAM's Accreditation Program and Museum Assessment Program and other standards and ethics initiatives. By working at the structural level around excellence and accreditation, AAM will have exponential and fieldwide impact in setting standards for DEAI. Although AAM's stance has always been collaborative, it's essential that AAM holds itself and other museums accountable for embedding DEAI and anti-racism into the very fabric of the field. The recently formulated Strategic Framework, 2022-2025, approved by the AAM Board of Directors in November 2021, underscores advancing "Diversity, Equity, Accessibility, Inclusion & Anti-racism" as a fundamental priority. The National Leadership Grant is positioned to further a key objective of AAM's Strategic Framework, while also advancing the IMLS' Strategic Plan 2018-2022 Goal to "Achieve Excellence." ⁷



Fig. 2 Four Pillars of the AAM Strategic Framework, 2022-2025

Project Work Plan

AAM's Continuum of Excellence comprises a number of esteemed programs that guide museums in best practice, including decades-long programs like Accreditation, which celebrates its fiftieth anniversary in 2021. With deep respect for the processes and procedures that support

⁷ Institute of Museum and Library Services, 2018, *Transforming Communities: Institute of Museum and Library Services Strategic Plan 2018–2022*. https://www.imls.gov/sites/default/files/publications/documents/imls-strategic-plan-2018-2022.pdf.

these programs, and the countless staff and volunteers who bring them to life, we are embarking on a review of these programs. As these programs benefit many stakeholders, their review requires a distributed and multi-layered approach, including internal and external evaluators, and multiple rounds of input to arrive at the democratic and equitable outcomes we seek. To this end, we conceive of the project over three years, as follows.

Guided by the *Excellence in DEAI* report and its use of Core Concepts and Key Indicators, AAM will convene a Steering Committee of six individuals (conceived to include an AAM Board Member, the Chair of AAM's Accreditation Commission, two Chief Diversity Officers in the field, and two Senior Field Leaders) to oversee the three-year process. This body's responsibility will be to determine a clear and streamlined process for reviewing the Excellence programs and the Code of Ethics to establish rules of the road for the other individuals and bodies engaged in the process, and ultimately to be accountable for the equity of the review process itself. This body will devise a framework for activities and ensure alignment with AAM's Strategic Plan 2022-2025: Diversity, Equity, Accessibility, Inclusion & Anti-racism.

AAM will engage through a Request for Proposal (RFP) process, three firms and/or consultants. The first, a research firm, will analyze current demographic and social factors of Excellence programming for an evidence-based evaluation, to identify and isolate any demographic and other variance in program outcomes; the second and third consultants, an ethicist and DEAI practitioner, will establish the ideological framework and nomenclature to guide discussions and development of processes and procedures.

The Steering Committee will be responsible for vetting recommendations and nominations for a secondary working group, a Task Force of fifteen individuals, including Accreditation Commissioners (x3), heads of field-specific organizations (x3), heads of non-field-specific organizations (x3), and other stakeholders from the field (x6). The goal for the working group is the widest representation and most diverse perspectives, to ensure inclusion and consideration for all organizational types.

Finally, a skilled project facilitator will be responsible for sharing the determined framework, language, and clear processes, as well as recording the results of the group's work. During monthly meetings, this group will consider and discuss the Core Concepts and Key Indicators from the *Excellence in DEAI* report, findings from the programmatic review, research, interviews by external experts, and their discussions, to arrive at standards that will frame a detailed review of each program on the Continuum of Excellence.

The second year of the National Leadership Grant will focus on implementation of the changes determined by the volunteer bodies and transparent engagement with the field. The Task Force will continue to meet quarterly to oversee staff-led operational changes to key processes, procedures, and documents. They will also consider points of fieldwide engagement to test assumptions and guide a well-considered education campaign of DEAI-focused changes to the program.

While we cannot foresee all changes the Task Force will recommend, staff anticipates procedurally beginning with a rewrite of the AAM Code of Ethics. The document was last updated nearly two decades ago and will be reviewed for DEAI and other considerations. This foundational document will codify the principles around DEAI considerations in museum and organizational excellence generally, and undergird suggested change to programs on the Continuum of Excellence.

In partnership with the Task Force, the inclusion program team, and associated constituents, AAM excellence program staff will propose associated and specific changes to processes, procedures, and language for each program on the Continuum of Excellence, seeking ongoing or as-needed feedback, and full review at quarterly Task Force meetings. Concurrently, the Accreditation Commission will discuss changes at each of its three meetings during the year, and advance discussion and expectations around training of members and Peer Reviewers. The Excellence staff will further develop Peer Reviewer training with a third-party consultant to inform the content and software delivery platform.

In the third and final year, the foundational DEAI review of the Continuum of Excellence will focus on developing, piloting, and launching a training curriculum for AAM staff, the Accreditation Commission, Peer Reviewers, and other volunteers active in the programs. Inclusion staff will partner to present DEAI-focused workshops framing the process and outcomes, while the Excellence team will hold year-long volunteer training regarding changes to their processes and procedures. For the field, the AAM Content team will disseminate a multifaceted, year-long educational training campaign to educate museum professionals on the changes to the Continuum of Excellence and associated documents. This will include webinars, video, blog posts (from staff and volunteers or museums involved in the programs), and more.

To conclude the project, with an eye toward transparency of process, we will engage a final third-party firm to conduct an evaluation survey of the program, to provide results to the field on our activities. Our hope is that the evaluation process will provide a model for other organizations working through a multi-year, system-wide process to embed DEAI fundamentals at a structural level.

Project Risks

It will be a challenge, with some associated risk, to determine who will participate on a Steering Committee and Task Force. AAM requires these *ad hoc* leadership bodies to comprise both experienced field and non-field-specific individuals. These bodies must have some understanding of DEAI and/or excellence programming for museums. AAM must ensure our process for selection of participants is as equitable as the process we seek to undertake so that we may report to our constituents on our process for change. We will seek a diversity of viewpoints in order to obtain the highest view of the work before these temporary bodies.

A second risk is to balance transparency of process with a narrative about changes to the Continuum of Excellence, and, indeed, the shifting nature of museum excellence. We know that

⁸ "AAM Code of Ethics for Museums." *American Alliance of Museums*, 15 Jan. 2018, https://www.aam-us.org/programs/ethics-standards-and-professional-practices/code-of-ethics-for-museums/.

we will need to manage the expectations of AAM constituents around change as we commit to keeping the field, Peer Reviewers, and the Accreditation Commission abreast of, and at varying levels engaged in, the process, so that we are thoughtful stewards of this work. Individuals must be brought along by the underlying ideas, and institutions must feel any changes made to a process on which they've come to rely are well-considered and fundamentally sound. We expect that a strategic communications plan will help address this particular risk, particularly when building in space and time for community conversation and feedback from the field.

A final risk, and perhaps the biggest, is to either not go far enough with this project to effect substantial change, or to go so far as to make the programs too burdensome for institutions to undertake. This program will be the first comprehensive review for equity of process, and we must make sure we set up future generations for success by thoughtfully and deeply considering what changes are required. Our findings must make it plain that DEAI *is* museum excellence, not an add-on to it, and our process improvements must ensure these ideals are achievable by each institution.

Key Personnel

The key personnel who will co-lead the planning, implementation, and management of this project include three current heads of department at AAM, and one new position, an Excellence in DEAI Project Manager (to be hired) who will be responsible for project coordination.

Julie Hart, Senior Director for Museum Standards and Excellence, will lead the project. Julie provides leadership and oversight of AAM's Continuum of Excellence, a pathway of standards-based programs including AAM's Accreditation Program and Museum Assessment Program, and other standards and ethics initiatives. She has been involved with Accreditation and efforts to nurture institutional excellence throughout her 23-year tenure at AAM. Julie holds an M.A. in Art History from The George Washington University and a B.A. in Art History and International Affairs from the University of Mary Washington.

Andrew Plumley, Senior Director of Equity and Culture, will support the project. Andrew has overseen AAM's internal DEAI work and the *Facing Change: Advancing Museum and Board Diversity and Inclusion* initiative since 2019. He started his career in higher education, where he advised institutions on diversity and inclusion strategy and provided system-focused access and success programming for Pell-eligible students of color. Andrew holds an MBA with a focus on social and environmental sustainability from the University of Vermont's Grossman School of Business and a B.A. from Middlebury College.

Megan Lantz, Director of Content and Community Engagement, will support the project. Megan is responsible for content and community engagement at the Alliance, including oversight of AAM's strategy for digital and print publishing and digital media. Since joining the Alliance in 2015, she also has directed key global and education-related initiatives. Her professional experience has spanned the federal government and non-profit sectors and has included projects related to international development, public diplomacy, arts education, youth

leadership, and storytelling through public radio. Megan holds a master's degree in education from Harvard University and a B.A. in international relations from the University of Virginia.

Excellence in DEAI Project Manager (vacant) will oversee the three-year project outlined for the National Leadership Grant, including coordination with (1) the Inclusion team, leadership bodies (Task Force and Steering Committee) and third-party firms/consultants, (2) AAM Excellence team members and leadership bodies for material programmatic changes and "training of," including Peer Reviewers and the Accreditation Commissioners, and (3) the Content team for all fieldwide educational programming about the changes and transparency of process. This person will also track our progress in achieving the time-bounded results identified within this proposal, as well as concluding the evaluative process with a third-party firm at conclusion.

Project Results

The Excellence in DEAI project proposed for the IMLS National Leadership Grant will address the fundamental need for greater diversity, equity, accessibility, and inclusion (DEAI) in museums by updating AAM's Continuum of Excellence programming that provides core standards and best practices to museums across the country, with the ultimate goal of embedding DEAI into their organizations and structures. Applicable to aquaria, art museums, history and science museums, house museums, zoos, and more, the Continuum of Excellence will advance the knowledge and understanding of DEAI as it relates to organizational culture, collections stewardship, education and interpretation, community and audience engagement, and board leadership. As museums undertake accreditation, they will be guided in considering DEAI at the levels of public trust and accountability, mission and planning, leadership and organizational structure, financial sustainability, and facilities and risk management. Finally, the nearly one hundred thousand museum professionals who annually seek to inform themselves about the Continuum of Excellence will understand tactically how to advance DEAI in their own work.

The opportunity to weave DEAI into the most prominent venue museums have for demonstrating excellence will have a long-lasting and exponential impact, with tactical knowledge and standards understood by museum staff, their communities, their organizations, and society as a whole. The IMLS National Leadership Grant's investment in AAM's Excellence in DEAI offers wide and beneficial implications for museums, one that will pay dividends to our nation in the form of more democratic and equitable outcomes for all.

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