

Michigan State University

Office for Inclusive Excellence and Impact

Program Planning and Operating Procedures Guidelines

The Office for Inclusive Excellence and Impact, or IEI, at Michigan State University leads and coordinates institutional priorities that advance inclusive excellence for all Spartans. IEI coordinates programs that aim to build community across MSU through partnerships and are grounded in a foundation of dignity, respect, empathy and accountability.

Members of the Spartan community are invited to volunteer for any of the university-wide inclusive excellence planning committees coordinated by IEI and Outreach and Engagement.

The following Program Planning and Operating Procedures, or PPOP, will provide guidance to IEI planning committees to systematize processes, keeping all members on the same page and working together in a cohesive manner.

Planning committees and the Outreach and Engagement Manager in IEI will work together to reach agreements on event planning using the PPOP. IEI welcomes feedback from committees as they use the guide to plan events. Adherence to the procedures by both parties is necessary. On occasion, when there is a need to adjust or amend an original agreement, both parties must agree in writing before the changes are put into effect. Planning committees must adhere to receive the funding they request or other types of support provided by staff in IEI.

Committees are expected to review, become familiar with, and follow the PPOP guidelines. Members are welcome to provide feedback to improve the guidelines. New members will be onboarded using the PPOP. It is important that all members follow the guidelines to align with the Outreach and Engagement program goals.

Please consult with the Outreach and Engagement Manager if you have questions about these procedures.

Operating Procedures

University-wide Inclusive Excellence Programs

The Office for Inclusive Excellence and Impact is responsible for coordinating planning committees and assisting with the coordination of the following university-wide programs:

- [Dr. Martin Luther King Jr. Commemorative Celebration](#)
- [Inclusive Excellence Awards](#)
- [César Chávez and Dolores Huerta Commemorative Celebration](#)
- [MSU Juneteenth Celebration](#)
- [IEI Speaker Series with the Vice President and CDO](#)

- [Welcome Reception for New Faculty, Administrators and Staff at MSU](#)¹

Program Purposes

To create opportunities for individuals from all backgrounds to **share stories, learn from each other, to acknowledge historical and current events that have changed lives, and to honor individuals** who are recognized nationally and locally as leaders who dedicated their lives advocating for **social justice**, which includes access to resources, equal participation, and human rights.

To **celebrate, award and acknowledge** the achievements of MSU faculty, students, support staff and administrators whose efforts align with MSU's 2030: Excellence for Global Impact strategic plan.

To **demonstrate MSU's commitment** to live our shared values every day around access, opportunity, and excellence and to lead by example in being a safe, welcoming, and respectful campus.

Goal Setting

Most of us have a sense of pride in our work and we want to know that our efforts were received well by the communities we serve. Setting goals as programs are planned is a good way to conduct committee business. Goals provide a sense of direction, motivation, a clear focus, clarify importance, and serve as targets to aim for. IEI encourages committees to apply the [SMART](#) goal technique to help guide goal setting. SMART is an acronym for **S**pecific, **M**easurable, **A**chievable, **R**ealistic, and **T**imely. A SMART goal incorporates all these criteria to help focus a committee's efforts and increase the chances of achieving its goals.

Committee Composition

The composition of the committees is important. Participation should reflect the university community and align with MSU's [access, opportunity and excellence values](#). Invitations to participate should extend to individuals who express interest in participating, or who are members of recognized organizations comprised of MSU students, staff, faculty and, in some cases, external communities. Committees will mostly be composed of MSU representatives.

Committee Process

Committees will be led by members chosen to serve as chair/vice chair or co-chairs; however, they prefer to define their leadership. The decision about leadership is to be made at the annual debriefing meetings, which are the final official meetings of the program year.

Members interested in being selected as a committee leader can be nominated by another member or self-nominate. When nominations are accepted by the group, nominees should provide a brief oral statement, not longer than three minutes, to the committee explaining why they are interested in the position and why they believe they have the skills and experience to successfully lead the group.

A simple majority vote among members present at the debriefing meeting will confirm the leaders. Committee leaders will serve for one year; however, if no new nominees are put forward, current leaders are interested, and the committee agrees, they can be reappointed to serve for the next cycle.

Leadership responsibilities

Early planning has been proven to be beneficial for all involved; therefore, committee leaders should work with the IEI to schedule the first meeting in September every year.

Committee leaders are expected to work with the IEI Outreach and Engagement to:

- Meet with IEI Outreach and Engagement in August to prepare for the coming program year.
- Set annual meeting schedules, making the effort to avoid, as much as possible, overlapping with other committee meetings so that the Outreach and Engagement Manager can attend.
- Make sure pertinent information, i.e., agenda, meeting reminders, and meeting notes/minutes are distributed timely, at least one week prior to the next meeting.
- Ensure that relevant university policies and procedures are always followed, including branding standards.
- Provide regular updates to the IEI coordinating office, including the Fiscal Officer, to keep lines of communication open, troubleshoot issues and respond to questions or concerns in a timely manner.
- Monitor budgets approved by IEI to avoid overspending.
- Partner with the Communications Manager to ensure that the information to be communicated is accurate and provided in a timely manner.
- Strategically schedule final debriefing meetings as early as possible following the program, but after the summary report has been compiled and submitted to IEI. Each committee member should receive a copy of the report at least one week before the debriefing meeting. Standard practice should be to invite the Vice President/CIO to attend debriefing meetings, which serve as end-of-year reviews. Vice President/CIO office protocol should be followed to set this appointment without delay.

Committee responsibilities

- Committees are expected to **meet for the first time soon after the start of the fall semester** and regularly until the completion of the program.

- Proposals **must** be submitted, minimally, 90 days from the start of the fall semester, the earlier, the better. Failure to comply with this timeline can result in the committee not receiving funding from IEI.
- Feedback on proposals submitted to IEI will be provided to committee leaders within two weeks after the application is received.
- Committees can choose to meet in person, virtually on Zoom, or use a hybrid meeting model. When meetings and programs are scheduled in person, effort should be made to schedule in spaces on campus that are accessible.
- IEI programs must be ADA-compliant and meet accessibility and inclusion standards, including providing captioning, interpreters, ensuring the availability of family restrooms, seating, and nearby parking.
- Committees planning events should be sensitive to [religious holidays](#) by avoiding scheduling programs on those days.
- Online **registration/reservation** forms should be easy to access, complete and always include questions about accommodations relative to food allergies or dietary restrictions, a need for interpreters, open seating arrangements, or other special needs.
- Be sure that all **meals** are equal to the standard entrée provided, regardless of dietary restrictions. Be sure that everyone has a meal that satisfies their dietary needs and provides enough food.
- At **annual debriefing meetings**, committee members should make an effort to attend and be prepared to engage in conversations to improve the program's effectiveness. It is important that all committee members contribute to the discussion. Everyone's opinion is important. This is also the time for committees to select leaders for the upcoming program year.
- Committees are holistic in that they create, develop, and implement their ideas. That is why **teamwork** is so vital to the smooth operation and success of these programs. When committees decide on the program's framework, all members should volunteer to serve on subcommittees or take on responsibility for completing tasks.
- If **symbolic social justice marches** on campus are part of an event, please be sure to coordinate the route with the MSU Police and follow all University policies and procedures that apply to locations such as The Rock.
- Programs should include opportunities for audiences to provide feedback to describe their experiences. **Evaluation instruments** can be designed and distributed at events. The goal is for committees and IEI to receive feedback to assess the quality of events.

Fiscal Responsibilities and Management

- In collaboration with the Outreach and Engagement Manager, the Fiscal Officer in IEI is responsible for overseeing program budgets. They work closely with program committees to manage income and expenses.
- The IEI Fiscal Officer is responsible for and authorized to establish protocol and operating procedures for committees to follow.
- When committees request funding support using the proposed process listed above and funding is approved, the Fiscal Officer is responsible for setting the methods for collecting funds and paying expenses, and for establishing IEI standards for committees to follow.
- At the beginning of the fall semester, the Fiscal Officer will provide a Financial Support Letter to the Outreach and Engagement Manager for distribution to the committee co-chairs. This letter will contain the budgeted amount for programming that IEI will contribute for the fiscal year. The Financial Support Letter will provide details of sponsorship funds that are secured by the committee co-chairs and how those funds will be managed. This letter will also provide additional details of the monthly budget reports that the IEI Fiscal Officer will prepare for the Outreach and Engagement Manager and the committee co-chairs.
- The Fiscal Officer will route all program expenses that are posted in the Quali Financial System to the Outreach and Engagement Manager. All receipts must be attached to the e-doc, and the transaction must include a business reason noted in the e-doc.
- Committee leaders and the Fiscal Officer work together to ensure that University accounting policies and guidelines are always followed.
- General members are free to research the costs of products and services, but must seek approval of their committee leaders before spending or making financial commitments to external sources.
- Committee leaders and the Fiscal Officer communicate frequently to ensure that their work flows smoothly, and they synchronize their efforts.

Committee leaders are free to create their own budget spreadsheets. Please be advised that the reports provided by the IEI Fiscal Officer are generated directly from MSU's system and the university accounting system is the official financial record. The reports are current through the prior business day.

Fundraising

When committees decide to raise funds to support programs, they must treat it as a priority and act on it early and strategically. A clear, easy, and professional process should be established to reach out to potential donors. Members of the committee assigned to oversee fundraising should first consult with

the Fiscal Officer to ensure that all important details are included in the invitation letter and confirmation letters. Committees might find it helpful to establish a subcommittee to take on fundraising responsibilities.

Please refer to the Financial Support Letter for further details on how sponsorship funds will be managed.

Evaluations

One of the best ways to determine whether program goals are met is to survey audiences. Audiences are the best source to obtain information. Collecting this information will be the substance of a committee's summary report about the event. We want to know how many people participated, what their affiliation is, and, most importantly, what they thought about the event. Below are suggested categories and qualitative methods that can be used to design a survey is below:

- Name of the event
- Date of the event
- Examples of statements about the event that participants could respond to using the Likert scale below:
 - 1 Strongly disagree---2---3---4---5 Strongly Agree ○ Examples of statements might be:
 - The event was held at an accessible location.
 - The menu included food options that accommodated my needs.
 - Speakers used inclusive language during their presentations.
 - It was important to see visual aids using closed captioning or having interpreters present to assist guests who might have impaired hearing.
 - Program materials were in large print which was helpful.
 - From what I could determine, the audience was broadly diverse.
 - The atmosphere was welcoming and respectful of everyone.
 - Opening and closing remarks were thoughtful and helped to set a positive tone for the event.
 - Registering for the event was simple ▪ I felt included.
 - Based on your participation, would you attend future events hosted by the Office for Inclusive Excellence and Impact and invite others? Yes/No/Not sure ○ Affiliation: MSU Faculty/Academic Staff, Undergraduate student, Graduate/Professional student, Support Staff, Administrator, Other
 - Leave space in the form for participants to write their overall opinion about the event.

Reports

Reports designed to summarize events are important to committees and to IEI. They serve to document committee activities, reflect the level of participation, assess the quality of programs based on audience feedback, provide a detailed accounting of expenses, and are a good source of information for conversations about the value of these types of events.

Committee leaders should submit written reports to IEI not more than **40 days** following the events. If an extended time is needed, committee leaders should work with IEI to agree on a new submission date.

The organization of content is important if reports are going to be useful. Content should include:

- Title of the program and the theme
- Date(s) of the event
- If there were multiple events as part of a main program, list titles and dates of each
- Name of person submitting the report and their position on the committee
- Date of the report
- Introduction describing the purpose of the report (2-4 short paragraphs)
- Body of the report that focuses on details about the program, includes data analysis (number of people attended and what they thought about the program) and if goals were set (i.e., did you set a fundraising or attendance goal?). Were goals met? Were there challenges, and how were they addressed?
- Overall program review summary

Following the debriefing meeting, decisions made during those meetings about direction for future planning should be added as the final section of the program report. This document is intended as the “annual” report and as the planning guide for the next program year.

If you have questions about these procedures, contact [Floresio Hernandez](#), Outreach and Engagement Manager.