An Overview of the Equity Scorecard™ Process

The Center for Urban Education's (CUE) Equity Scorecard™ process is designed to help higher education professionals change practices at their college or university to effectively create equitable outcomes for historically underrepresented racial-ethnic student groups. The Equity Scorecard™ process is distinguished by five phases, which are explained below. At the conclusion of the process, a college or university will have completed a Scorecard that identifies the measures it will use annually to gauge progress towards its long-term equity goals to increase college completion rates for students of color.

Phase One: Laying the Groundwork

The process begins with CUE facilitators conducting an inventory of current campus efforts to strengthen outcomes for students of color. This includes a review of campus diversity plans, multicultural programs, strategic plans, and accountability and data reports. In conjunction with campus leadership, CUE uses this information to create a plan to align and integrate the Equity Scorecard™ process with existing diversity initiatives. Recognizing that practitioners are at the heart of institutional change, CUE then guides campus leadership to bring together faculty and staff from the “silos” of higher education—instruction, administration, student affairs, and institutional research—to form an evidence team.

During the training of team members, CUE emphasizes the need for practitioners to not only become aware of institutional inequities but also to take responsibility for reducing educational opportunity gaps and strive for equity, or parity, in outcomes. This approach is based in equity-mindedness, which counteracts the tendency to explain equity gaps solely as the result of student deficits (also known as deficit-mindedness).

The Five Phases of the Equity Scorecard™ Process

- **Laying the Groundwork**: CUE facilitators collaborate with campus/system leadership to align the Scorecard with existing efforts and identify individuals to serve on the evidence team. The team meets to learn about data and using CUE’s tools.

- **Defining the Problem**: Evidence team members use the Vital Signs as a starting point to investigate campus data and increase their knowledge about student outcomes.

- **Assessing Interventions**: The evidence team uses the Benchmarking Equity and Student Success Tool™ (BESST) to identify and prioritize intervention points. They then identify institutional practices that positively or adversely affect student success through the use of Self-Assessment Inventories.

- **Implementing Solutions**: The evidence team sets short-term, actionable objectives and long-term equity goals for priority areas of concern.

- **Evaluating Results**: The evidence team completes the Equity Scorecard™ and with CUE’s support shares its findings and goals with the system/campus.
Phase Two: Defining the Problem

The evidence team meets once a month to collectively investigate data and increase its practical knowledge about student outcomes. At these meetings, team members collaborate to investigate the Vital Signs*, CUE’s visually accessible template that presents basic institutional measures—access, retention, and completion—disaggregated by race and ethnicity. The Vital Signs initiate action research by prompting team members to raise questions about the data, reframe assumptions into questions, and decide what additional data they should look at to answer these questions. This data investigation is unique in that it provides a framework for evidence team members to contextualize and substantively define institutional problems as well as serve as agents who drive change. The evidence team uses data to ask questions about institutional policies and practices and learn how they may improve what is happening “in the field.”

Phase Three: Assessing Interventions

Existing numerical data only takes the evidence team so far in understanding how an institution contributes to inequities. After prioritizing intervention points using the Benchmarking Equity and Student Success Tool™ (BESST)—an interactive display that shows where and when students struggle or are lost as they progress through college—the evidence team uses Self-Assessment Inventories to contextualize the problems of inequity with qualitative data obtained unobtrusively in classrooms, advising centers, and through interactions with peers. These inventories are assessment tools developed by CUE. They guide teams through document analysis, observation, and interview protocols. Through this inquiry, the CUE Equity Scorecard™ process creates “best practitioners”—individuals who are trained to use data to uncover equity gaps, identify ineffective practices that hinder student success, and distinguish which practices and interventions address the unique needs of their students. The team members then become better positioned to draw on this knowledge in ways that provide a good fit with their institutional culture and values.

Phase Four: Implementing Solutions

Most systems of higher education have elaborate diversity plans, but they lack benchmark goals to address racial equity in access and success. The BESST™ responds to this need by allowing evidence teams to manipulate their current success, persistence or progress rates to set short- and long-term benchmark equity goals. When setting these goals, the evidence team draws upon the knowledge they gained through campus inquiry, allowing them to establish realistic benchmark goals.

* The term “Vital Signs” is used because it provides insight into the health and status of an institution with respect to equity in student outcomes (Bensimon, Hao, and Bustillos, 2006).
One of the most common mistakes made in benchmarking is setting goals that are too lofty. Benchmarks that call for the doubling or tripling of success rates in a short period of time stretch resources and do not take into account the campus-wide effort needed to promote equitable success. In contrast, the Equity Scorecard™ process produces incremental short-term goals to close achievement gaps in small, but achievable, action steps in order to realize longer-term equity goals.

Phase Five: Evaluating Results

The evidence team aligns its benchmark goals with tailored-to-the-institution interventions. In the process, team members help initiate a "culture of assessment" that will be monitored by the Equity Scorecard™, a "report card" that captures campus indicators of student success and benchmark goals. The Equity Scorecard™ serves as a document that campuses can refer to every year to measure their progress toward equity. More important, the Equity Scorecard™ also documents the institution's progress to address inequities. Most assessment measures today monitor only the students' efforts and their educational outcomes, rather than the institution's efforts. These institutional efforts can include regular classroom and student support services observations; practitioner reflection on their syllabi, materials, and instructional strategies; and administrators' reflections on professional development for faculty and staff. Reframing assessment methods to include institutional effort can significantly impact the ways in which institutions address improvement efforts. Attention and resources are usually allocated to what is measured and assessed.

During this final phase, campus evidence teams also communicate their findings (through dissemination templates) to their colleagues in order to generate knowledge, understanding and support for the equity goals that have been documented. The objective is to generate momentum for institution-wide change that will be sustainable over a long-term period.