

# Advancement Operations DEIA Considerations

*1/3/2023 Updates*

## Overview

As part of the overall Williams College DEIA initiatives, the Advancement Operations group's primary goal is to support the Office of College Relations staff in any and all initiatives related to DEIA. Advancement Operations will do our best to support the initiatives undertaken by the '68 Center for Career Exploration, Alumni Relations, and Development. There are also some areas where Advancement Operations can take the lead and play a part in advancing this area.

## Data: Definitions, Policies, and Collection

The Advancement Operations office is currently working to replace the Advance system with Slate for Advancement as the database of record for parent, donor, and alumni data. The Advance system was designed with limited settings for both gender and race/ethnicity. We would like to consider making changes in the following areas as we convert to the new Slate database:

- Gender & Gender-Change Policies
- Race/Ethnicity
- Marital Data
- Names data (prefixes, preferred pronouns, salutations, name tag and envelope names)
- Sexual Orientation data
- Citizenship
- Data Collection (surveys, etc.)
- Reporting

## Gender

Below are the current values for gender in Advance.

- Male (M)
- Female (F)
- Gender Non-Conforming (G)
- Transgender (T)
- Transgender Male (A)
- Transgender Female (B)
- Other (O)
- Unknown (U)
- X

The 'X' code has no description, it is simply listed as 'X'. [Newsweek](#) defines this code as follows:

*Gender X is a term used to encompass "a gender that is not exclusively male or female, including, but not limited to, intersex, agender, amalgagender, androgynous, bigender, demigender, female-to-male, genderfluid, genderqueer, male-to-female, neutrois, nonbinary, pangender, third sex, transgender, transsexual, Two Spirit, and unspecified,"*

As we move toward Slate, we want to review these values and ensure that we have defined the best practice values. But we will want to do this in coordination with other areas of the College. For example, we learned that Admission now gathers some additional information with respect to gender:

*Williams respects, honors and celebrates the many identities that make up our community. Please choose all gender identities that apply:*

- Female; Woman*
- Male; Man*
- Nonbinary*
- Questioning; Exploring*
- Gender identity not listed*
- Prefer not to respond*

If the 'Gender identity not listed' option is selected, a text box allows the person to enter their preferred definition.

We have requested this data for the next incoming class and will find a place in Slate to store it. Additionally, we will work with other areas of the College to work toward a comprehensive definition of gender, whether that is a single or multi-value option.

### **Gender Changes**

The Records group within Advancement Operations is revisiting all data entry policies with respect to adding or changing gender or race/ethnicity. We are revisiting our policies regarding gender changes for alumni, parents, friends, and children. In some cases, we retain the original names. Is this a desired practice? Is there a reason for us to do this or would we consider the constituent's request and simply change the name? There may be reasons why we need to retain the original name for an alum or student, but PeopleSoft can be the repository of that data. The Advance system is more suited to using naming conventions preferred by the constituents.

Additionally, when there is a gender change, we have made other changes across the database. We should review these. Do we need to retain the original name? The original gender? We often change certain nuanced data such as relationships (father/son might change to mother/son or a gender-unspecified version like parent/child). We also make changes to sports such as the men's tennis team. We need to review all of the existing policies and ensure that what we are doing is respectful and legally correct.



Mark  one or more boxes **AND** print origins.

White – *Print, for example, German, Irish, English, Italian, Lebanese, Egyptian, etc.* ↴

Black or African Am. – *Print, for example, African American, Jamaican, Haitian, Nigerian, Ethiopian, Somali, etc.* ↴

American Indian or Alaska Native – *Print name of enrolled or principal tribe(s), for example, Navajo Nation, Blackfeet Tribe, Mayan, Aztec, Native Village of Barrow Inupiat Traditional Government, Nome Eskimo Community, etc.* ↴

Chinese       Vietnamese       Native Hawaiian

Filipino       Korean       Samoan

Asian Indian       Japanese       Chamorro

Other Asian – *Print, for example, Pakistani, Cambodian, Hmong, etc.* ↴

Other Pacific Islander – *Print, for example, Tongan, Fijian, Marshallese, etc.* ↴

Some other race – *Print race or origin.* ↴

**Marital Status**

Another policy we might examine is how we treat couples. We have two codes to indicate marital status: Married and Partner. The primary uses for this code are to send joint mailings and to determine whether a couple shares credit on a gift. Our database will only allow a joint gift when the couple is listed as married. We often struggle with knowing the status, perhaps more so with LGBTQ couples because they may not be as open with announcements and other ‘trappings of marriage’ that straight couples wouldn’t hesitate to publish because of fear of prejudice. So it might be good to discuss these policies and perhaps bend a little and allow any couple that states they are a couple to be listed as married so they can split credit on gifts and receive a household mailing.

**Names and Salutations**

Could we consider moving away from using prefixes in our names and using just first and last names? We have names like Mrs. John Smith. Would it be acceptable for us to have our names be simply first name and last name? And salutations be the first name?

We recently sent a mailing to a woman with a mailing name like ‘Mrs. John Smith’. The husband wrote to a staff member saying ‘Shame on you. This is 2020.’ We’ve long wanted to

eliminate the use of Mr., Mrs. and Ms. and to instead use first names like John and Mary Doe. We have a working committee studying this and have started by removing gendered prefixes from the most recently graduated classes. We will also eliminate gendered prefixes for the incoming class for student and parent records.

### **Sexual Orientation**

In 2019, we did an alumni survey and asked this question: 'Do you consider yourself a member of the LGBTQ+ community?' We got 440 Yes responses out of the 7k+ responses and loaded this as a mailing list in Advance. Should we have done this? Should it be removed?

### **Citizenship**

Because we are required to report donations of a certain amount from foreign donors, it is important for us to capture citizenship. Currently, Advance the ability to store 2 citizenship codes. We need to determine if that will be sufficient within Slate. Also, is there a need to store information such as resident or non-resident alien? More discussion is needed here.

### **Data Collection**

The steps listed above are simply making room for new data to be stored. The more important phase of this process requires that we collect this data. Our recommendation is that Advancement Operations work together with Alumni Relations and Development to create an initiative to begin collecting information such as race/ethnicity from students and alumni.

Messaging will be of utmost importance in this project. We need to explicitly indicate how we will use this information in order to satisfy privacy and security requirements. Our goal is to help us do a better job of our DEIA initiatives and to potentially facilitate connections between different alumni groups.

This data collection might be handled with an all-alumni survey request, but our response rates for these have been poor, in the 25% range. It might be better to find a way to ask for this information as part of reunion planning or to work with alumni volunteers to work on a class at a time. This will take some collaboration and planning to accomplish. But the email and survey functionality within Slate should assist us as we progress in the implementation. Once we convert our alumni directory to Slate, we will be able to immediately update data. And we can more easily survey users and given them more flexible opt-in/out options.

### **Reporting**

Advancement Operations can help by providing more reporting and analysis of our data with respect to gender, race/ethnicity, affinity groups (WBAN), age, and geographic locations. This work is being done by our Prospect Management & Analytics group. We have created new reports to analyze Alumni Fund giving in terms of gender and ethnicity. We have done multiple years of analysis for the 68 Center in terms of student use of their services based on gender, race/ethnicity, and other factors.

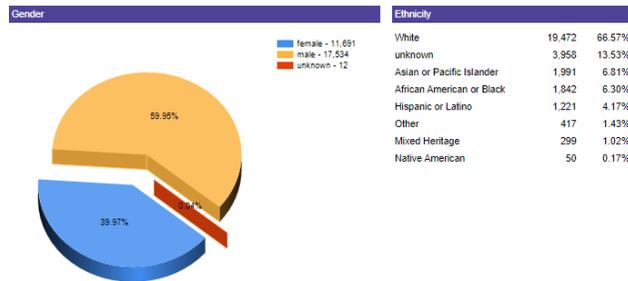
There are other reports in the pipeline. At this stage, we have just one report that views the entire alumni body in these terms:

Total Number of Alumni	29,250
Median Class Year	1993
Alumni Married To Alumni	2,803 11.16%

*Calculated as total number of Alumni divided by the coed population from class year 1972 and greater*

Decades		
1930's	2	0.01%
1940's	115	0.39%
1950's	1,129	3.86%
1960's	2,264	7.74%
1970's	4,120	14.09%
1980's	5,187	17.73%
1990's	5,272	18.02%
2000's	5,365	18.34%
2010's	5,260	17.98%
2020's	536	1.83%

Regions					
New England	7,269	24.85%	New York	4,415	15.09%
Mid-Atlantic	3,599	12.30%	South	3,170	10.84%
Mid-West	2,476	8.46%	South West	1,122	3.84%
West	5,566	19.04%	Non-Contiguous	221	0.76%
Foreign/Other	1,410	4.82%			



### Outreach/List Analysis Report

We recently provided a new report that allows end users to look at lists for mailings and invitations in addition to other lists like a fundraiser's portfolio and view the constituents by gender, age, geographical location, and ethnicity. The concept is that we would analyze the proposed invitation list or mailing list before we send out the emails or paper to get a feel for the diversity of the group. The report can be run for any list generated from Advance in the form of a clipboard. This was recently run for each of our fundraisers to give them a sense of the gender and ethnicity diversity of their portfolios.

We also recently modified the Alumni Fund by Giving Levels report in ABI to allow AF staff to review these giving levels by combinations of gender and ethnicity:

FYear Start: 
 Pyramid Type:

FYear End: 
 Ethnicity Value:

Gender Value:

Alumni Fund Performance by Levels - All Ethnicities/All Genders Williams College  
Office of College Relations

	Donors			Dollars			LYBUNTs		Pipeline	
	Goal	Donors	Progress Over(Under)	Goal	Achieved	Progress Over(Under)	Donors	Dollars	Prospects	Dollars
\$250,000+							2	\$500,000		
\$100,000-\$249,999		1			\$100,000		19	\$1,951,375	5	\$500,000
\$25,000-\$99,999		7			\$226,980		75	\$2,592,383		
\$10,000-\$24,999		7			\$76,783		152	\$1,910,959		
\$5,000-\$9,999		10			\$53,000		258	\$1,423,116		
\$2,500-\$4,999		16			\$47,394		478	\$1,347,802	1	\$2,500
\$1,000-\$2,499		31			\$37,948		1,130	\$1,411,101	1	\$1,000
\$250-\$999		109			\$42,782		2,882	\$1,125,528		
\$100-\$249		221			\$29,430		3,983	\$507,797		
<\$100		559			\$25,147		4,650	\$157,652		
<b>Total</b>		<b>961</b>			<b>\$639,444</b>		<b>13,589</b>	<b>\$12,927,713</b>	<b>7</b>	<b>\$503,500</b>

### Hiring and Training

Another way in which the Advancement Operations department can participate in DEIA is to continue to look for diverse candidates when filling open positions. Given that the pandemic has proven that remote work is possible, we may consider looking at hiring from outside Williamstown where we might have more success in recruiting diverse candidates. Our location can often be an obstacle in creating a diverse pool of candidates.