

 CASES FROM THE FIELD

# Putting on our Reality Glasses: Policy Review and Project Management through an Equity Lens

*by Kristin Benson, Autumn Landis, and Rebecca Mathern*

Universities are made up of people from different backgrounds, experiences, and identities. Assessing disparate impacts when developing policy and launching projects can improve outcomes. Leaders in the Office of the Registrar at Oregon State University implemented a structured, consistent process to review policy and manage projects using an equity lens with the aspiration of improving outcomes for all students, particularly those from marginalized identities.

Despite the best efforts to remain objective, rational, and fair, registrar and admissions professionals are just as susceptible to bias and tradition as anyone in other professions. They can't always see things from students' perspectives and colleagues' perspectives; it's even more difficult to put themselves into the shoes of folks with backgrounds, experiences, and identities different from their own regardless of how many diversity, equity, and inclusion trainings they attend. It takes work to try and understand their impact on others. And, when registrars get to work, it's often structured work.

Leaders in the Office of the Registrar at Oregon State University (OSU) decided to structure policy and project work in order to become better at doing this: the office wanted a structured way to put on reality glasses and truly see the potential impact of its policies and projects on stakeholders, especially those who are typically

marginalized in higher education settings. This article intends to help readers become familiar with the policy and project tools used in OSU's Office of the Registrar, understand how these project tools connect with departmental and university goals, and think about how other campuses might infuse diversity, equity, and inclusion concepts into their own project planning or policy reviews.

## Background

The structures OSU's Office of the Registrar built borrow heavily from Portland Community College's "Take 5 Toolkit" and from Dr. Kathy O'Bear's resources discussing privileged and marginalized identities (Portland Community College 2022). The "Take 5 Toolkit" structures decision-making around five themes:

- Centrality and intersectionality of race and racism
- Challenge to dominant ideology
- Commitment to social justice
- Centrality of experiential knowledge
- Interdisciplinary perspective

These themes merge traditional project management precepts within project tools such as a minimum threshold analysis and a project charter and work plan. The themes are also factored into a policy analysis tool. A resource from Dr. Kathy O’Bear’s “Recognizing and Interrupting Microaggressions” helped office leaders think about various dimensions of diversity, power, and marginalization when considering stakeholders and how they may experience disparate impacts from technology implements, project initiatives, policies, and policy changes (O’Bear 2022).

This work was grounded by OSU’s strategic goals and action items tied to those goals. OSU’s strategic plan 4.0 goals are:

- Preeminence in research, scholarship, and innovation
- Transformative education that is accessible to all learners
- Significant and visible impact in Oregon and beyond
- Culture of belonging, collaboration, and innovation

Further, it was important to embed the department’s stated goals into project decisions. These goals focus on improved information, streamlined services, a 21st century office in terms of staffing and technology, clear paths to success, access to accurate and timely data, and institutional integrity; specific university and departmental goals are called out when proposing, scoring, and scheduling projects.

## Policy Review

Embedding concepts from Portland Community College’s (2022) “Take 5 Toolkit” and from Dr. Kathy O’Bear into policy review procedures began with the office’s

compliance team in 2019. The team, comprising units focused on VA and military compliance, NCAA academic eligibility, degree conferral, and student privacy and FERPA, created a template to center stakeholders with marginalized identities in the review process. While the template has gone through several iterations, the current version includes the following prompts:

- Outline how stakeholders are affected by the current policy and/or how a proposed policy change could impact stakeholders; include estimated numbers of each stakeholder that will be affected, if known.
- What is the impact of this policy on stakeholders with marginalized identities? How does the impact differ for those who hold multiple identities?
- Has anyone asked stakeholders, including those with marginalized identities, about the current policy or the proposed policy change? If yes, what was learned? If no, consider surveying stakeholders or surveying those who work most closely with stakeholders and describe the feedback here.
- What is the traditional thinking or conventional wisdom around this policy? What facts or ideas challenge this status quo?
- Who holds power with regard to this policy? Who holds less power, and what do they lose because of this policy?
- Keeping in mind the impact to stakeholders with marginalized identities, what are policy ideas that can lessen negative impacts of this policy? Describe policy ideas that challenge assumptions and status quo thinking. State how each requirement improves the experiences of those impacted by the policy.

Answering these questions has helped the office make meaningful changes to unit policies over the last few years. For example, the office expanded who is able to obtain VA and military commencement cords and how they can get them; the office decided *not* to make a change to the quarterly degree conferral deadline after it



**FIGURE 1** ► OSU Office of the Registrar Project Lifecycle

was proposed that it be moved up to earlier in the term. These decisions may seem small in terms of impact to units but are significant in how they impact students.

## The Project Lifecycle

The office has done a nice job running projects for a number of years, but staff wanted to do a great job. In 2020, the office was able to hire a senior assistant registrar for projects and communications and asked that she help build structures to incorporate diversity, equity, and inclusion principles from PCC’s “Take 5 Toolkit” and from Dr. Kathy O’Bear so that equity is considered at multiple steps throughout the project life cycle.

When a project is requested, either from within the Office of the Registrar, or from other university departments, a “Minimum Threshold Analysis” is conducted that focuses on determining:

- The stakeholders, including marginalized stakeholders, who could be impacted by the policy/project. How could each group be impacted?
- Feedback from stakeholders, especially those holding marginalized identities, or those who work closely with stakeholders.
- The traditional thinking or conventional wisdom around this project/policy. What facts or ideas challenge this status quo?
- The policy or project ideas that remove barriers and mitigate negative impacts to stakeholders, especially those with marginalized identities.

This analysis is typically conducted during an hour-long meeting involving various stakeholders external to the office (including students when staff can get them!) and subject matter experts from the office, and is facilitated by a member of the projects and communications team. Tools used during this meeting include a blank copy of the “Minimum Threshold Analysis” template, which is filled in during the meeting by the facilitator and a set of “equity cards.” The “equity cards” are a deck of cards that list out various dimensions of diversity/identities such as: age, ability/disability, veteran status, race, gender, and first-generation college student status. Staff look through the full deck to identify those dimensions or identities that could be impacted—positively or negatively—by the proposed project or policy. Essentially, staff use these cards to help think as critically and thoroughly as possible when answering the first question listed above. (Staff also use these cards during the policy review process).

Once the “Minimum Threshold Analysis” is completed, copies are sent to the Office of the Registrar’s leadership team. The office’s leadership team reviews the completed template before deciding if it will approve the request as a new project or not. This is a qualitative review, and the team is looking for confirmation that the project will positively benefit stakeholders and will remove barriers for marginalized stakeholders (or, at the very least, not create new barriers).

Once a project is approved by the leadership team, it is scored by the team using the project scoring crite-

**TABLE 1 ► OSU Office of the Registrar Project Scoring Criteria**

| Action                                                             | Scoring                                                                                |                                                                                         |                                                                                          |                                                                                        |                                                                              |
|--------------------------------------------------------------------|----------------------------------------------------------------------------------------|-----------------------------------------------------------------------------------------|------------------------------------------------------------------------------------------|----------------------------------------------------------------------------------------|------------------------------------------------------------------------------|
|                                                                    | 1                                                                                      | 2                                                                                       | 3                                                                                        | 4                                                                                      | 5                                                                            |
| Support Strategic Plan 4.0 Action Items                            | No strategic value                                                                     | Low strategic value (1 Action Item)                                                     | Moderate strategic value (2 Action items)                                                | High strategic value (3-4 Action Items)                                                | Significant strategic value (5+ Action Items)                                |
| Significantly improve status of 1 or more SP 4.0 Action Items (AI) | The project will improve the status of an AI in a minimal way or is Compliance Project | The project will improve the status of an AI in a moderate way                          | The project will improve the status of an AI in a significant way                        | The project will improve the status of more than one AI                                | The project will significantly improve the status of more than one AI        |
| Support OtR Goals                                                  | Supports 1 OtR Goal                                                                    | Supports 2 OtR Goals                                                                    | Supports 3 OtR Goals                                                                     | Supports 4 OtR Goals                                                                   | Supports 5+ OtR Goals                                                        |
| Addresses a key operational issue or pain point                    | Does not address any operational issues or pain points                                 | Minimally addresses operational issue or pain point                                     | Moderately addresses operational issue or pain point                                     | Mostly addresses operational issue or pain point                                       | Eliminates operational issue or pain point                                   |
| Addresses Compliance or End-of-Life Issue                          | Does not address compliance or end-of-life issues                                      | Addresses small compliance or end-of-life issue                                         | Addresses moderate compliance or end-of-life issue                                       | Addresses significant compliance or end-of-life issue                                  | Addresses multiple significant compliance or end-of-life issues              |
| Ability to Execute (Low-Hanging Fruit)                             | No clear ability to execute                                                            | Execution possible, but solutions not clear or are extremely complex and time consuming | Execution possible and solutions clear, but are relatively complex and/or time consuming | Execution probable and solutions are somewhat clear and are relatively straightforward | Execution is probable with clear solutions that are quick and easy to manage |
| Impacts Stakeholders with Marginalized Identities                  | Neither hurts nor helps stakeholders with marginalized identities                      | Eliminates barriers for one marginalized stakeholder group                              | Eliminates multiple barriers for one marginalized stakeholder group                      | Eliminates barriers for two or more marginalized stakeholder group                     | Eliminates multiple barriers for many marginalized stakeholder groups        |
| Advisors Indicate Priority                                         | Advisors do not indicate as a priority                                                 | Low priority for advisors                                                               | Moderate priority for advisors                                                           | High priority for advisors                                                             | A "Top Three" priority for advisors                                          |
| Reduces OtR Manual Processing Hours                                | Does not reduce manual processing time                                                 | Low reduction in manual processing time                                                 | Moderate reduction in manual processing time                                             | High reduction in manual processing time                                               | Significant reduction in manual processing time                              |

ria to determine its level of prioritization among other projects. Scoring criteria focuses on:

- university and departmental strategic goals,
- operational issues and pain points,
- compliance or technical end-of-life considerations,
- ease of execution,

- increases in equity/impacts to marginalized stakeholders
- academic advisors' priorities, and
- ability to streamline processes (*i.e.*, reduce manual processing time for stakeholders or the office).

Important information from the “Minimum Threshold Analysis” helps scorers determine the impacts to marginalized stakeholders and score the project accordingly for that criterion. Scorers use this information to determine the degree to which the project hurts or helps stakeholders with marginalized identities (*i.e.*, the degree to which barriers are eliminated for marginalized stakeholder groups).

Various criteria are weighted differently in the scoring matrix; compliance/end-of-life factors and equity/impacts to marginalized stakeholders are the most heavily weighted criteria in the scoring tool, so those criteria have a bigger impact on a project’s overall score. This means that projects that increase equity and remove barriers at the institution are more likely to kick off earlier and are considered higher-priority projects than those that score lower. And, as might be expected, there are some projects that become requirements because they are required by university executive leadership. It’s part of the process to still score those projects in order to help leaders see what other competing projects exist.

Once a project is scored, its score is compared to all other current and future projects so that an appropriate start term and timeline can be determined.

Most managers in the Office of the Registrar, along with the office’s technical team weigh in on assigning the best

**TABLE 2 ► OSU Office of the Registrar Project Ranking by Overall Score**

| Project Name                                                      | Project Status | Overall Score | Rank |
|-------------------------------------------------------------------|----------------|---------------|------|
| Forms Online                                                      | In Progress    | 115           | 1    |
| S/U Phase II                                                      | Proposed       | 114           | 2    |
| Registration Experience 2.0                                       | Proposed       | 109           | 3    |
| Degree Completion AWA Jobs                                        | Proposed       | 108           | 4    |
| Summer Sessions Policy                                            | In Progress    | 106           | 5    |
| Automated Withdraw from the Term (AR 13)                          | In Progress    | 105           | 6    |
| Common Course Numbering                                           | In Progress    | 105           | 6    |
| Financial Readiness and Success                                   | Proposed       | 103           | 8    |
| Commencement Technical Overhaul                                   | Proposed       | 103           | 8    |
| Institutional Degree Awarding Phase II                            | In Progress    | 102           | 10   |
| INTO OSU Registration                                             | Proposed       | 94            | 11   |
| Automated Course Withdraw (AR 12)                                 | In Progress    | 92            | 12   |
| Student Experience CRM                                            | In Progress    | 91            | 13   |
| Priority Registration Overhaul                                    | Proposed       | 88            | 14   |
| Oregon Transfer Compass and MTM                                   | Proposed       | 88            | 14   |
| Confidential Student Protocols                                    | Proposed       | 88            | 14   |
| Grader and TA Policy                                              | In Progress    | 87            | 17   |
| Proxy Access to Student Data                                      | Proposed       | 86            | 18   |
| SSB8 Deprecation                                                  | In Progress    | 81            | 19   |
| Textbook Links in Banner                                          | Proposed       | 80            | 20   |
| HelioCampus                                                       | In Progress    | 79            | 21   |
| OtR Bot                                                           | Proposed       | 76            | 22   |
| Learning Outcomes in CIM                                          | In Progress    | 76            | 22   |
| Student Notification— Exceeding Requirements/Duplicate Course Reg | Proposed       | 75            | 24   |
| Graduate Student Degree Application Correction                    | Proposed       | 74            | 25   |
| OtR Self-Assessment                                               | In Progress    | 73            | 26   |
| Course Planning Data from SEP into CLSS                           | Proposed       | 72            | 27   |
| Commencement Diploma Data Comparison                              | On Hold        | 72            | 27   |
| Pushing Pronouns to Systems                                       | On Hold        | 71            | 29   |
| Inactivated Student Communication                                 | Proposed       | 71            | 29   |
| Sexual Orientation Collection                                     | Proposed       | 68            | 31   |
| Diplomatic Extract CSV                                            | Proposed       | 66            | 32   |
| Biennial FERPA Training                                           | Proposed       | 64            | 33   |
| DX for Advisors                                                   | Proposed       | 63            | 34   |
| Modify Hold for Degrees Transcripts by Level                      | Proposed       | 62            | 35   |
| AWA Late Registration Fees Job                                    | Proposed       | 62            | 35   |
| Shift 808 Courses to NC Transcript                                | Proposed       | 50            | 37   |

start term for the new project. Of course, compliance and technical end-of-life considerations factor heavily

in the project's start term. Once a project is kicked off and is considered active, one of the first tasks that the project coordinator or project lead will do is to transfer important information from the "Minimum Threshold Analysis" over to the project charter to ensure that key information about stakeholders—and disparate impacts, both positive and negative, to marginalized stakeholders—is centered throughout the project. The project charter serves not only as the foundational document for the project but also includes the project's work plan and communication plan. It is central to the project workgroup's work and is vital to a project's success.

## Putting it All Together

Admissions and registrar teams do not need to recreate the office's *precise* protocols or tools in order to start using an equity lens when running projects or evaluating new or existing policies. There are a few simple guidelines that can help shape this work and get an office started if they wish to implement something similar. Suggestions are:

- Create a template that asks good questions about how a project or policy will impact stakeholders who are historically or typically marginalized.
- Find ways to engage stakeholders.
- Use the template to analyze new project ideas or policy ideas.

- Using information and ideas from the analysis, develop policy or project requirements, goals, and/or objectives.
- Find a way to keep the analysis, objectives, and requirements centered throughout the project or throughout the policy development process.
- Keep stakeholders and decision-makers in the loop as the project or policy is implemented.
- Perform assessments at the end of each project to validate their success, or look for failures and ways to improve the project if it missed the mark.

It can be difficult for leaders to get started if they think the new structure needs to be perfect; it doesn't! Find passionate colleagues who are willing to set up some structures, and then assess and tweak along the way. Don't be afraid to try things and decide that they just don't work. Find ways to make the process easier for many stakeholders to contribute. Copy and steal everything (CASE) while citing your references, giving credit where it's due.

Consider the following quote to help motivate staff to get started: "Socially just leadership means being aware of the ways that power shapes administrative structures and culture—and working to dismantle these structures when power operates oppressively. Our policies and practices are not neutral" (Kezar and Posselt 2019, 13).

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