

- **BOV OBJ 2:** To create and foster a safe, equitable, and inclusive environment for all on Post
- **UAP Outcome #1:** The VMI Brand
- **UAP Outcome #2:** A VMI which is Diverse and Inclusive
- **UAP Outcome #3:** Committed to Honor
- **UAP Outcome #5:** One-VMI
- **IEP Goal 1:** Access and Success
 - Objective 2: Increase retention and academic success of historically underrepresented and underserved undergraduate students
- **IEP Goal 2:** Climate and Intergroup Relations
 - Objective 1: Create and maintain a climate that acknowledges and celebrates diversity and employs inclusive practices throughout its daily operations, aligned with VMI's vision, mission, and values.
- **IEP Goal 4:** Organizational Culture and Accountability
 - Objective 1: Develop a robust, empowered infrastructure to address longstanding institutional challenges and sustain the journey toward Inclusive Excellence.
 - Objective 2: Create a culture of evaluation and continuous improvement for administrators and senior leaders.

E. VMI should critically study the Honor Court's "education" policy. It should assess whether and how this practice is consistent with VMI's "single sanction" policy. VMI should also examine whether this practice can be applied reliably and consistently, and whether it produces disparate outcomes on race and gender lines. If VMI retains the "education" option, it should consider preparing clearer and better-defined criteria for when a cadet should be prosecuted and when he or she should be educated. VMI should also tell cadets, faculty, and administration that there is actually a "two-sanction system" in which one possible outcome of an Honor Court referral is informal "education" that obviates the need for a trial or a possible expulsion. Information on this "diversion" program should be maintained in the same manner as described in recommendation 3(a).

VMI does not have a "two-sanction" honor system. Understanding how the system and the honor court work is crucial to comprehending this fact. In the VMI system, a sanction (penalty) can only come as a result of a guilty verdict at trial. The only sanction administered for a guilty verdict is dismissal.

That said, not all reported violations of the honor code progress to trial. There are times when either the alleged offense did not occur, or the evidence is insufficient to warrant taking the case to trial. In those instances, the case is dismissed without prejudice. For example, in AY 2020-2021, there were 107 reports of suspected honor code violations. Of those, only four (4) went to trial.

At other times, even though the evidence is insufficient to progress to trial, it is strong enough to suggest that the reported cadet may have strayed – or is on the verge of straying – from the principles of the honor code. In these cases, when the assigned prosecutor (cadet), the Honor Court President (cadet), and the Superintendent's Honor Court Representatives (faculty) feel the evidence warrants it, the accused cadet will participate in an honor court remediation session.

These sessions, when they occur, are intended to corral potentially wayward cadets and bring them back in line with the principles of the honor code. Once the remediation session is complete, the

case is closed with no impact on their cadetship. This is a positive measure that clearly demonstrates the fairness of the process, that cadets are innocent until proven guilty, and that there are **NO** annual drum out quotas. The remediation is a benefit – vice a penalty – that is intended to prevent the cadet from making a costly mistake. Therefore, since there was no trial and no sanction, it cannot be argued that VMI has a two-sanction system.

VMI's single sanction honor code contributes to achieving the core principles below that will move VMI toward being a more inclusive, inviting, inspirational place to live, study, and train:

- **BOV OBJ 2:** To create and foster a safe, equitable, and inclusive environment for all on Post
- **UAP Outcome #3:** Committed to Honor
- **IEP Goal 1: Access and Success**
 - Objective 2: Increase retention and academic success of historically underrepresented and underserved undergraduate students
- **IEP Goal 4: Organizational Culture and Accountability**
 - Objective 1: Develop a robust, empowered infrastructure to address longstanding institutional challenges and sustain the journey toward Inclusive Excellence.
 - Objective 2: Create a culture of evaluation and continuous improvement for administrators and senior leaders.

F. VMI should formally examine and consider changing its Honor Court jury selection process and its policy of allowing convictions without unanimous verdicts. VMI should also consider including faculty in the jury process and should prohibit juror strikes based on race or gender. VMI should consistently track information on Honor Court juries to ensure fairness.

The honor court SOP review committee (mentioned in recommendation 3(a)) reviewed and debated multiple courses of action related to increasing diversity in trial juries. In their out brief to the Superintendent, they recommended, and he approved, the following key changes:

1. **Increase the size of the jury pool from 24 to 36 cadets.** In order to increase the diversity of the seated jury, you must first increase the diversity of the jury pool. Theoretically, if you increase the size of the randomly selected jury pool, then you increase the number of diverse individuals (minorities, women, and athletes) in the pool available to serve on the jury.
2. **Revise the voir dire process to eliminate pre-emptive strikes.** Previously, following “for cause” strikes, the defense and prosecution were then each granted two “pre-emptory strikes” from the remaining jury pool. Eliminating pre-emptive strikes removes the potential for striking jurors based on race, gender or permit status.
3. **Randomizing remaining jury pool a second time to seat the final jury.** Striking potential jurors “for cause” is the process of questioning members of the jury pool to determine possible connections to the accused or the events that led to the trial. The goal is to discern whether jurors possess biases that may prevent them rendering a fair and impartial verdict. Potential jurors are struck from the jury pool “for cause” if sufficient connection or bias exists. With the elimination of pre-emptive strikes, after the strikes for cause are complete, the final jury will be seated by randomizing and selecting the requisite number of jurors from the remaining jury pool members.

4. **Increase jury size.** Currently, the jury seated for an honor court trial is eight with seven primaries and one alternate. Going forward, the court will seat a twelve-person jury with eleven primaries and one alternate. Using the same statistical reasoning as was used to increase the size of the jury pool, it stands to reason that increasing the size of the seated jury increases the potential for a more diverse jury, especially with the elimination of pre-emptive strikes and the final jury being randomized a second time.
5. **Increase the number of guilty votes required to convict.** Currently, the Court requires five of seven jurors (71.4%) to vote guilty in order to convict. Increasing the size of the jury and requiring nine of eleven jurors (81.8%) to vote guilty increases the Court's burden of proof and further reduces the potential (real or perceived) of forcing a guilty verdict based on insufficient or circumstantial evidence.

Making the above changes to the processes used to select, seat, and instruct a jury contributes to achieving the core principles below that help move VMI toward being a more inclusive, inviting, inspirational place to live, study, and train:

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- **UAP Outcome #1:** The VMI Brand
- **UAP Outcome #2:** A VMI which is Diverse and Inclusive
- **UAP Outcome #3:** Committed to Honor
- **UAP Outcome #5:** One-VMI
- **IEP Goal 1:** Access and Success
 - Objective 2: Increase retention and academic success of historically underrepresented and underserved undergraduate students
- **IEP Goal 2:** Climate and Intergroup Relations
 - Objective 1: Create and maintain a climate that acknowledges and celebrates diversity and employs inclusive practices throughout its daily operations, aligned with VMI's vision, mission, and values.
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 - Objective 1: Develop a robust, empowered infrastructure to address longstanding institutional challenges and sustain the journey toward Inclusive Excellence.
 - Objective 2: Create a culture of evaluation and continuous improvement for administrators and senior leaders.

G. VMI should permit cadets to have the assistance of legal counsel in an Honor Court proceeding.

VMI's honor court history is flush with the pros and cons associated with allowing outside legal counsel to participate in honor court proceedings. The last time VMI permitted outside counsel was the 2010-2011 academic year. To that point in time, in their defense of an accused cadet, many outside counsel attempted shift the focus of the trial to the system itself, as opposed to the guilt or innocence of their client. Additionally, not every cadet could afford an attorney. For these reasons, VMI elected to bar outside counsel from honor court proceedings. While cadets were always free to consult legal counsel regarding their case, counsel could not participate in the proceedings. Following the decision to bar outside counsel, accused cadets were represented during the proceedings by a Defense Advocate selected from a list of faculty and staff volunteers.

Recognizing that equal opportunity does not necessarily result in equity, VMI will take a new tact on providing legal representation that inures to the benefit of the accused. The Institute will assemble a list of pro bono lawyers willing to assist cadets accused of an honor court violation at no charge to the cadet. Cadets may select legal counsel from this list or retain their own paid counsel. In this way, all cadets will have access to legal counsel, should they desire it.

In addition, outside counsel will be permitted to assist the accused throughout the process; however, similar to a Title IX hearing, they will not have a speaking role at the trial. During trial proceedings, a cadet's outside counsel may communicate solely through the cadet or the Defense Advocate. The responsibility to address the court, the jury, or witnesses continues to rest with the cadet or the Defense Advocates. To ensure the efficacy and viability of this approach, it will be re-assessed annually.

Providing all cadets access to legal counsel during honor court proceedings contributes to achieving the core principles below that will help move VMI toward being a more inclusive, inviting, inspirational place to live, study, and train:

- **BOV OBJ 2:** To create and foster a safe, equitable, and inclusive environment for all on Post
- **UAP Outcome #3:** Committed to Honor
- **UAP Outcome #5:** One-VMI
- **IEP Goal 1:** Access and Success
 - Objective 2: Increase retention and academic success of historically underrepresented and underserved undergraduate students
- **IEP Goal 2:** Climate and Intergroup Relations
 - Objective 1: Create and maintain a climate that acknowledges and celebrates diversity and employs inclusive practices throughout its daily operations, aligned with VMI's vision, mission, and values.
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 - Objective 2: Create a culture of evaluation and continuous improvement for administrators and senior leaders.

H. VMI should provide formal, comprehensive, and consistent training to all faculty defense advisors to the Honor Court and to the cadets who run the Honor Court, particularly with respect to implicit bias and its potential impact on prosecutorial decision-making.

The Superintendent's Representatives to the Honor Court – two of which are former Defense Advocates – and VMI's legal counsel, provide standardized and best practice training for new defense advocates to ensure they are familiar with their responsibilities and court proceedings. In an ongoing effort to make Defense Advocates more comfortable in their role, while also improving their performance, those classes and best practices are being codified into a separate Defense Advocates Handbook that will be available within the next year.

Ensuring all defense advocates have the tools necessary to properly represent cadets during honor court proceedings contributes to achieving the core principles below that help move VMI toward being a more inclusive, inviting, inspirational place to live, study, and train:

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- **UAP Outcome #3:** Committed to Honor
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- **IEP Goal 1:** Access and Success
 - Objective 2: Increase retention and academic success of historically underrepresented and underserved undergraduate students
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 - Objective 1: Develop a robust, empowered infrastructure to address longstanding institutional challenges and sustain the journey toward Inclusive Excellence.
 - Objective 2: Create a culture of evaluation and continuous improvement for administrators and senior leaders.

I. VMI should ensure that all incoming cadets, including athletic recruits, are provided with standardized, complete materials on what to expect as a Rat and a cadet before they matriculate. As part of these efforts, VMI should promote its “One VMI” philosophy to all incoming cadets, including athletes, to emphasize the goal of a unified cadet experience.

VMI’s Communications & Marketing department is working with Athletic and Admissions Directors to address recruiting efforts, to include a video that is being produced in coordination with the Regimental S-5 (Public Affairs) cadets. VMI anticipates viewing this video to be a mandatory part of the recruiting and admissions process. The first draft of the script for the video was completed 20 November 2021, and the video itself will be available for the 2022-23 admissions cycle which begins August 2022. Additionally, the Regimental S-5 staff gives athletic coaches “ratline tours” at various times throughout the fall semester to make them more familiar with ratline activities. These simple familiarization tours enable the coaches to talk about the ratline from an informed perspective and to provide first-hand knowledge-based answers to questions. Importantly, these tours included a session with the Honor Court.

Ensuring all incoming cadets have a complete picture of the VMI experience prior to matriculating contributes to achieving the core principles below that move VMI toward being a more inclusive, inviting, inspirational place to live, study, and train:

- **BOV OBJ 1:** To create, and foster a more diverse VMI
- **UAP Outcome #2:** A VMI which is Diverse and Inclusive
- **UAP Outcome #3:** Committed to Honor
- **UAP Outcome #5:** One-VMI
- **IEP Goal 1:** Access and Success
 - Objective 1: Achieve increased student enrollment from historically underrepresented and underserved populations.
 - Objective 2: Increase retention and academic success of historically underrepresented and underserved undergraduate students
- **IEP Goal 2:** Climate and Intergroup Relations
 - Objective 1: Create and maintain a climate that acknowledges and celebrates diversity and employs inclusive practices throughout its daily operations, aligned with VMI’s vision, mission, and values.

J. VMI’s Alumni Agencies should supplement their DEI plans to evaluate and implement DEI efforts undertaken by the alumni associations at peer schools, including establishing affinity

groups and associated events.

The VMI Alumni Agencies, comprised of the VMI Foundation, Inc., the VMI Alumni Association and the VMI Keydet Club are registered 501(c)(3)'s. The Agencies are separate and distinct (independent) from the Virginia Military Institute and each of the individual entities is governed by their own oversight board. That said, in the same spirit of cooperation as articulated by the BOV President, they provided the following response:

- We have reached out to peer institutions.
- We have engaged our minority/underrepresented alumni in discussions, conferences, and anniversary events.

4. TEMPER ASSOCIATIONS BETWEEN VMI AND THE CIVIL WAR AND CONFEDERACY

A. VMI should continue to reduce emphasis on traditions and iconography associated with the Civil War/Confederacy, to include installation of other traditions and historical associations, including those that promote diversity, equity, and inclusion.

The VMI BOV's Commemorations and Memorials Naming and Review Committee (CMNRC) first met on 17 Nov 2020, and has drafted a charter that was then approved by the committee on 13 January 2021 and by the full BOV on 29 January 2021.

The CMNRC charter reads "The Commemorations and Memorials Naming and Review Committee shall be responsible for oversight of all policies and practices related to the naming of buildings and places on Post as well as the existence of statues, commemorations and memorials on Post (buildings, places, statues, commemorations, and memorials hereinafter referred to collectively as "Memorials"). This oversight shall include, but shall not be limited to, all existing Memorials as well as all future Memorials. Notwithstanding the powers of the President of the Board enumerated in the preamble to this Section, it is anticipated that non-Board members of the Committee should include, among others who may be appointed, the head of the VMI Museum System, the principal government relations officer, a representative from the faculty, a cadet representative, and a representative of the VMI Alumni Agencies. In exercising its oversight and providing recommendations to the full Board for approval, the Committee shall consider, among other things, VMI's mission of producing citizen-soldiers imbued with honor, civility, and respect, and shall ensure that all Memorials properly reflect the Institute's commitment to diversity, equity, inclusion, and belonging."

The CMNRC has met five (5) times over the past 12 months, during which they have made significant strides in:

1. Identifying iconography on the VMI Post that would detract from an environment that was both "inspirational and inviting." Of the more than 400 tributes on Post, 54 items (cannons counted individually) can be considered to have ties to the Civil War.
2. Developing criteria by which specific iconography can be assessed to determine the appropriateness of retaining it in the VMI landscape.
3. Taking action on some of the most visible and seemingly contentious iconography.

In addition to removing the Stonewall Jackson statue on 7 December 2020 following an affirmative vote from the full BOV, the CMNRC has also voted to:

1. Remove the name Stonewall Jackson from above the main entrance (arch) into the VMI "Old Barracks."
2. Remove the direct attribution of the quote "You may be whatever you resolve to be" to Stonewall Jackson.
3. Remove the Jackson name from the Jackson Memorial Hall.
4. Expand the memorialization of the statue "Virginia Mourning Her Dead" to all VMI service members who have given their life in service to their Nation.
5. Preserve and contextualize "The Charge of the New Market Cadets" mural found in Memorial Hall. This will be done through digital interpretive media located in the vestibule of the Memorial Hall entrance.

Additionally, and as conveyed in VMI's 30-day report, the Institute modified what was formerly known as the New Market Parade to recognize all former VMI cadets who died in the service to the Nation. This new ceremony is now known as the Memorial Parade. Also, new cadets no longer travel to the New Market Battlefield to re-enact the charge of the VMI cadets before taking their cadet oath. The new cadet oath is now part of the Matriculation day proceedings.

Reducing emphasis on traditions and iconography associated with the Civil War and the Confederacy helps achieve the core principles below that help move VMI toward being a more inclusive, inviting, inspirational place to live, study, and train:

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- **UAP Outcome #5:** One-VMI
- **IEP Goal 2:** Climate and Intergroup Relations
 - Objective 1: Create and maintain a climate that acknowledges and celebrates diversity and employs inclusive practices throughout its daily operations, aligned with VMI's vision, mission, and values.

B. VMI should solicit input from current cadets and organizations (including the Promaji Club) when considering any action related to Civil War or Confederate-era iconography, symbolism, and traditions.

The Commandant of Cadets has instituted a new open-door policy whereby every Friday, he clears his schedule in an effort to encourage cadets to come in to speak with him one-on-one on wide-ranging topics. This policy seeks to promote transparency between the Office of the Commandant and the Corps of Cadets. This added transparency, access, and open communications establishes the foundation for the Commandant to bring in Promaji and other affinity groups such as the Global Perspectives Club (VMI's international students), to discuss participation in any activity that has the potential to stir cultural or other demographic sensitivities.

These increased communications between cadets and the administration will help achieve the core principles that will move VMI toward being a more inclusive, inviting, inspirational place to live, study, and train:

- **BOV OBJ 1:** To create, and foster a more diverse VMI

- **UAP Outcome #1:** The VMI Brand
- **UAP Outcome #2:** A VMI which is Diverse and Inclusive
- **UAP Outcome #5:** One-VMI
- **IEP Goal 3:** Education and Scholarship
 - Objective 2: Increase the cultural competencies of faculty and staff.
- **IEP Goal 4:** Organizational Culture and Accountability
 - Objective 1: Develop a robust, empowered infrastructure to address longstanding institutional challenges and sustain the journey toward Inclusive Excellence.
 - Objective 2: Create a culture of evaluation and continuous improvement for administrators and senior leaders
- **IEP Goal 5:** Community Engagement
 - Objective 1: Evaluate and expand community engagement and partnerships to create collective impact with other community organizations

C. VMI should review its practices on allowing cadets to associate with and participate in community events and celebrations such as parades, and should ensure (by implementation of a policy or otherwise) that these practices are equitable.

All requests for VMI participation in community events and parades go through a central clearinghouse for authorization, i.e., the Deputy Chief of Staff for Operations (DC/S Ops), who coordinates with the Commandant if the request involves cadets. The Commandant staffs the request through interested stakeholders such as cadet affinity groups and clubs and provides a recommendation back to DC/S Ops. Upon receipt of the recommendation from the Commandant, the DC/S Ops coordinates with the Chief of Staff and Superintendent and decides on appropriateness of VMI's participation. VMI participation in an official capacity requires VMI personnel to wear the appropriate uniform while representing the Institute. If, on the other hand, it is determined that participation is not in the best interests of the Institute, and to avoid infringing on individual rights, authorization may be granted for individual participation. In these instances, any member of the VMI community who elects to participate would not be authorized to represent VMI in an official capacity or in a VMI uniform.

Ensuring equity in the policies and procedures that govern participation in community events and celebrations will help achieve the principles below that move VMI toward being a more inclusive, inviting, inspirational place to live, study, and train:

- **BOV OBJ 1:** To create, and foster a more diverse VMI
- **UAP Outcome #1:** The VMI Brand
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- **IEP Goal 5:** Community Engagement
 - Objective 1: Evaluate and expand community engagement and partnerships to create

collective impact with other community organizations

D. VMI and the Alumni Agencies should never accept funds from any entity that discriminates or supports discrimination based on race or gender.

The VMI Alumni Agencies, comprised of the VMI Foundation, Inc., the VMI Alumni Association and the VMI Keydet Club are registered 501(c)(3)'s. The Agencies are separate and distinct (independent) from the Virginia Military Institute and each of the individual entities is governed by its own oversight board. That said, in the same spirit of cooperation as articulated by the BOV President, they provided the following response:

- The VMI Alumni Agencies Gift Policy addresses discrimination:
- "The Agencies will not accept gifts that involve discrimination based upon race, religion, gender, sexual orientation, age, national origin, color, disability, or any other basis prohibited by federal, state, and local laws."

5. ACTIVELY ADDRESS RACIST, SEXIST, AND OTHER UNACCEPTABLE LANGUAGE AND BEHAVIOR

A. VMI should design and implement sensitivity and bystander training for cadets (including incoming cadets) focused on racism, racial slurs, racial jokes, and racial stereotypes. This training should emphasize that no one's background excuses the use of racist language.

TITLE IX TRAINING

VMI annually executes a training program that addresses discrimination, harassment and sexual misconduct. Compliant with Office of Civil Rights guidelines, a biennial cadet survey, is administered to better understand the overall campus climate at VMI. The survey includes topics such as sexual assault and sexual harassment, and is currently being updated. Future iterations will incorporate questions related to racial tension. This information helps VMI: (a) develop prevention programs, (b) ensure existing response services are adequate, and (c) determine how response services can or should be improved. The survey questions were developed to be gender-neutral (i.e., with an understanding that sexual misconduct can happen to or be perpetrated by anyone).

With the survey providing the baseline for developing this training, VMI's annual Title IX training calendar includes the following:

New Cadets/Rats (Freshmen)

- Matriculation Week (August):
 - Introduction of the IG/Title IX Coordinator, Assistant IGs/Title IX Coordinators, and their roles and responsibilities.
 - Following train-the-trainer classes and using IG provided talking points, the Cadet Equity Association (CEA) and Officer of the Guard Association (OGA), which are cadet/student government entities, conduct *Stoop Talks* to reinforce Title IX-related topics of cadet safety, reporting procedures, and connecting to resources or support services if required.
- 10 September 2021: the IG's Office hosted a "Connect for Success" panel discussion.
 - A panel of subject matter experts provided information on supportive resources in health, well-being, academic support, professional counselling services, mentoring/shared interest

groups, clubs/extracurricular activities, access to religious support, and information about upcoming programming through the Center for Leadership and Ethics, IG/Title IX Office and Office of the Diversity, Equity, and Inclusion.

- Fall semester (October)
 - Online training program titled *Sexual Violence Prevention for Students* (by Vector Solutions).
 - Training covers consent, healthy relationships, bystander intervention, stalking and the realities of sexual assault and sexual harassment.
 - Every cadet must participate. Participation is tracked and reported by Vector Solutions.
 - Cadets must take and pass a quiz at the end of the training. Quiz failures and cadets that miss the training are remediated.
- Spring semester (February)
 - In compliance with the Violence Against Women Reauthorization Act of 2013, Bystander Intervention Training (BIT) is delivered annually in three modules.
 - VMI utilizes *StepUp*, to deliver its BIT training.
 - *StepUp* was created by Becky Bell, University of Arizona, in partnership with the NCAA, University of California – Riverside, and the University of Virginia.
 - This is peer facilitated training conducted by Title IX staff trained cadets. Roll is taken and cadets are required to make up the training if it is missed.

3rd Classmen (Sophomores)

- Fall semester (October)
 - Enhanced Bystander Intervention Training.
 - Peer delivered training, supervised by faculty and staff members of IG/Title IX office.
 - Includes simultaneous live and virtual training on topics of dating violence, healthy relationships, consent, safety, and developing prevention skill sets.
 - Additional training delivered by Project Horizon on the key components of healthy dating relationships, such as consent and boundaries.

2nd Classmen (Juniors)

- Fall Semester.
 - In preparation for Ring Figure, the Title IX Office and Project Horizon delivers combined, in- person training on topics of alcohol awareness, bystander intervention, and sexual violence prevention.

Entire Corps of Cadets

- **Respect, Report, Support Campaign**
 - New for fall 2021 semester and intended to promote shared values of equity, civility, safety, and belonging in our learning community.
 - Designed to enhance visibility of the Title IX Office in person, on the website, through redesigned posters, and in handouts.
 - The IG plans to develop a Public Service Announcement that will feature cadets and staff promoting their commitment to the psychological and physical safety of the VMI Community.
- On 13 October 2021: As part of Dating and Domestic Violence Awareness Month, the IG/Title IX Office sponsored a film screening of, *Intimate Violence*, a documentary by Mr. Nolan Zunk, (a senior at Washington & Lee University), and featuring Project Horizon and others discussing the impact of intimate partner violence on individuals and communities. Following the film, the

IG moderated a Q&A session with Dr. Stephanie Sandberg (the film maker's faculty advisor) and Project Horizon.

- January 2022 (registration day following winter furlough)
 - This Annual Title IX training is presented in person by Campus Outreach Services. Each VMI class (freshman-senior) receives a tailored program based on their year group that covers sexual misconduct, sexual abuse, and sexual harassment. The classes are provided through interactive case studies, scenarios, and testimonials.
- During the "in between" survey years, the IG/Title IX Office will conduct cadet and employee focus groups on specific topics, such as the ease of reporting or perceptions of barriers/obstacles to reporting, access to supportive measures, identifying and understanding factors in the culture leading to increased or decreased risk for sexual harassment, sexual assault, and inequitable racial treatment.

Intercollegiate Athletic Office

- Each fall
 - In accordance with NCAA directives, the entire athletic department staff receives in-person Title IX training provided by the IG/Title IX Coordinator(s). The primary focus of this training is an update on changes in Title IX and familiarization with GO16. The Athletic Director is responsible for ensuring his entire staff participates and that remediation occurs for those who miss the scheduled training.

VMI / State Employees

- Delivered biennially
 - An online program delivering Title IX training and covering topics such as discrimination, harassment, and sexual misconduct.
 - Annual climate surveys (January) are used to assess the work environment and the effectiveness of the training

DIVERSITY, EQUITY, AND INCLUSION TRAINING

VMI's new Chief Diversity Officer (CDO) hit the ground running when she reported aboard this past summer. Her charge to build an Inclusive Excellence training program for the fall semester that aligns with the Superintendent's Unifying Action Plan was analogous to building an airplane in flight. To facilitate that effort, VMI carved out an hour each week on Friday mornings from 11:05-12:15. These "Superintendent's Training" periods were divided between the Title IX Coordinator and the CDO. The CDO's training periods were conducted on September 24th and October 1st, 8th, 15th, 22nd, and 29th.

VMI's Inclusive Excellence Training seeks to create and sustain an inclusive community where Cadets have increased cultural competency, thereby better equipping them to be better leaders in an increasingly interconnected, diverse and multi-cultural global operating and work environment.

Drawing on the Association of American Colleges & Universities (AAC&U) Inclusive Excellence guidelines, the CDO's Inclusive Excellence training features four tenets:

- Achieving educational equity in an inclusive, accepting setting.
- Learning the skills, information, and mindsets students need to impact a diverse society.
- Building a climate in classrooms and on the post that supports all students
- Fostering learning opportunities that accept diversity is a benefit to problem-solving.

The resulting program is a collection of widely accepted Inclusive Excellence training sessions captured in VMI's first "Cadet Training Guide for Inclusive Excellence" (see Appendix 4). Pulling this together on short notice was a herculean effort; however, the program is up and running. The CDO will make determinations on future trainings (i.e., for the spring 2022 semester) based on in-stride surveys intended to provide feedback on what was effective and what was not, as well as indicate which areas or topics require additional training. Thus far, the training conducted with the rat (freshman) class has been well-received and widely accepted. For example:

- 76.6 % of respondents were mostly or completely satisfied with the inclusive excellence activities.
- 87.9% of respondents thought the activities helped them connect with their peers.
- 94.3% of respondents though the activities helped initiate dialogue about inclusivity.

When asked to share what they learned from the activities, the vast majority, albeit not all, took positive lessons from the training as captured in a sampling of their comments below:

- I learned to be more mindful of the things that I say and how my words can affect someone else.
- Not to judge someone on the surface level.
- I learned about how different I am from my brother rats and realized that despite our differences we are all still able to respect each other.
- Reinforced that we are all different and shouldn't judge others for being so
- Just was very repetitive and corny
- It's ok to say that I am prejudiced, because everyone has prejudice. The only difference is acknowledging that you have that and working to minimize it in different situations.
- Inclusiveness and respect lead to healthier friendships
- I learned that inclusivity at VMI needs to be looked at differently than inclusivity at my high school. At my high school, most of the people there came from the same racial and socioeconomic background so it was easier to interact with them. With the different backgrounds at VMI, I need to make sure that I am including everyone that I can.
- It really just divided people and made people look at each other differently and not in a good way.
- I found the training to be a great bonding experience with my company as it allowed me to be aware of the differences that make us who we are, as well as the shared experiences that bond us in a deeper way.
- That we all need to be accepting and open to everyone the way that they are and to not judge someone before we actually know them.
- I learned I was not alone in coming from abusive environments.
- There are not a lot of people like me here.

VMI's current Title IX and Inclusive Excellence training programs utilize a pyramidal or building block approach that is assessed and adjusted as required. That said, both the CDO and IG/Title IX Coordinator will conduct research on other Virginia public institutions of higher education and senior military colleges to determine how our programs compare and make additional adjustments as appropriate.

VMI's current Title IX and Inclusive Excellence training programs contribute to achieving the core principles below that will help VMI toward being a more inclusive, inviting, inspirational place to live, study, and train:

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- **UAP Outcome #2:** A VMI which is Diverse and Inclusive
- **UAP Outcome #5:** One-VMI
- **IEP Goal 2:** Climate and Intergroup Relations
 - Objective 1: Create and maintain a climate that acknowledges and celebrates diversity and employs inclusive practices throughout its daily operations, aligned with VMI's vision, mission, and values
- **IEP Goal 4:** Organizational Culture and Accountability
 - Objective 1: Develop a robust, empowered infrastructure to address longstanding institutional challenges and sustain the journey toward Inclusive Excellence.
 - Objective 2: Create a culture of evaluation and continuous improvement for administrators and senior leaders.

B. VMI should implement a social media policy with guidelines for cadets' use of social media to promote VMI's standards of respect and integrity and compliance with applicable laws. VMI should also monitor social media to help identify issues of racism and sexism in the Corps.

VMI's General Order (GO) 71, Use of Social Media, was updated in June 2021 and includes the following section on personal social media use for both employees and cadets.

Personal Social Media Use

Employees:

- *Employees must ensure that any personal social media posts do not give the impression of representing the Commonwealth of Virginia or the Institute. While employees are permitted to mention their status as VMI employees on social media, employees must also be clear that any posts are personal and do not represent the position or views of the Institute.*
- *To protect the privacy of cadets and employees, VMI employees may not post photographs or videos taken within Barracks, classrooms, training areas, or work areas of VMI without the express agreement of all persons pictured in an identifiable manner.*
- *Employees are not authorized to use VMI logos, wordmarks, or other Institute trademarks on their personal social media sites or in posts to social media.*
- *Employees may report incidents of disruption of constitutionally protected speech on social media to the Inspector General.*

Cadets:

- *The Blue Book, Institute regulations, the general orders listed in Paragraph 3 of this policy, and all other general orders apply to posts and other activities on social media. Cadets also are reminded that the identity of persons who post to "anonymous" social media sites can be determined and that any cadets who violate Institute policies and cadet standards of conduct in the course of social media use, anonymous or not anonymous, will be sanctioned to the fullest extent appropriate. In accordance with General Order 17, cadets are subject to disciplinary standards from matriculation until graduation or other separation from the*

Institute regardless of their geographic location and while on leave, furlough, or otherwise absent from Post.

- *Cyberbullying and cyberstalking by anyone, including cadets, are expressly prohibited by the Institute's policies and standards and may constitute criminal activity. Pursuant to General Order 16, stalking, which includes cyberstalking, is defined as a course of conduct directed at a specific person that would cause a reasonable person to: (i) fear for his or her safety or the safety of others; or (ii) suffer substantial emotional distress. A "course of conduct" means two or more acts by any means, including social media use, through which an individual follows, monitors, observes, surveils, threatens, or communicates to or about any person.*
- *Posting of Photographs or Video. Cadets may not post to social media photographs or videos without the express agreement of all persons pictured in an identifiable manner.*
- *Upper class cadets may not post on social media any photographs or videos of identifiable rats regardless of whether or not the rat or rats pictured agree to such use.*
- *Due to the risk of disruption of training activities, all cadets must obtain the approval of the commandant's staff member, ROTC staff member, or faculty member in charge of a training event prior to undertaking photography or videography in close proximity to training activities and must abide by any instructions provided by that individual.*
- *Likewise, all cadets must obtain the approval of the faculty member in charge before undertaking photography or videography in classrooms and laboratories and must abide by any instructions provided by that individual.*
- *Cadets are not authorized to use VMI logos, wordmarks, or other trademarks on their personal social media sites or in posts to any social media.*

In accordance with Virginia Code § 23.1-405(E), Institute officials, other than the VMI Police in carrying out official law enforcement duties, will not require any cadet to disclose the username or password to such cadet's personal social media accounts.

Cadets may report incidents of disruption of constitutionally protected speech on social media to the Cadet Equity Association or the Inspector General.

The full text of GO 71 is available at <https://www.vmi.edu/media/content-assets/documents/general-orders/GO71.pdf>. Included in the GO is the established "Protocol for Reporting Threatening or Harassing Posts."

Additionally, as mentioned in recommendation 3(d), VMI's Institute Regulations: Part III (Blue Book), which governs the good order and discipline of the Corps of Cadets is currently being reviewed and updated by the new Commandant of Cadets. It is expected that this re-write will incorporate penalties for inappropriate use of social media that negatively impact good order and discipline. This project is anticipated to be completed by the end of the fall 2021 semester.

Finally, VMI does monitor Jodel, the social media platform alluded to in the Barnes & Thornburg report. First Amendment rights apply to social media so VMI must comply with the law with respect to that monitoring. Offensive language does not necessarily constitute a threat unless it expresses intent to commit an act of unlawful violence. As a result, VMI is most often limited to simply monitoring and using available administrative and cadet chains of command to mitigate risks to good order and discipline. For example, rather than ban Jodel from VMI networks, the Superintendent asked cadet leaders to get a handle on the posts that are detrimental to the changes he is attempting to implement at VMI. According to the Communications and Marketing team that monitors that particular social media app, there has been a noticeable decrease in the types of Jodel posts that led to this recommendation, as well as a corresponding increase in the number of “corrective or regulating” posts when the negative ones do occur. It is also important to note that were a specific threat to appear on Jodel, VMI has procedures to deal with them and it begins with the reporting protocol in Annex A of GO 71.

VMI’s current social media policies and practices contribute to achieving the core principles below that will help move VMI toward being a more inclusive, inviting, inspirational place to live, study, and train. These principles can be found in the BOV’s DEI Objectives, as well as the Unifying Action (UAP) and Inclusive Excellence (IEP) Plans:

- **BOV OBJ 2:** To create and foster a safe, equitable, and inclusive environment for all on Post
- **BOV OBJ 3:** Assure that we maintain a safe, rigorous process for escalating issues which have even the potential to violate the Code of a Cadet
- **UAP Outcome #1:** The VMI Brand
- **UAP Outcome #2:** A VMI which is Diverse and Inclusive
- **UAP Outcome #5:** One-VMI
- **IEP Goal 2:** Climate and Intergroup Relations
 - Objective 1: Create and maintain a climate that acknowledges and celebrates diversity and employs inclusive practices throughout its daily operations, aligned with VMI’s vision, mission, and values
- **IEP Goal 4:** Organizational Culture and Accountability
 - Objective 1: Develop a robust, empowered infrastructure to address longstanding institutional challenges and sustain the journey toward Inclusive Excellence.
 - Objective 2: Create a culture of evaluation and continuous improvement for administrators and senior leaders.

C. VMI should ensure a strong, vocal, unified, and public response by leadership condemning all discriminatory, racist, or sexist acts that occur on post or by a cadet or other individual associated with VMI. VMI should take measures to ensure that such misconduct is treated at least as seriously, and that it carries at least the same stigma, as instances of lying and cheating.

VMI does not tolerate discriminatory, racist, or sexist acts by any member of the VMI community. A strong, vocal, unified, and public example of that policy was clearly articulated by the VMI Superintendent in his 12 July 2021 letter to the VMI Corps of Cadets.

Members of the Corps of Cadets:

When I began my role as Superintendent last November, I stood before you and said that we will not tolerate acts of racism, sexism, homophobia, and xenophobia. Today, the Washington Post published a story detailing allegations of sexual assault and harassment at VMI. The allegations contained within the story are unacceptable of any VMI cadet and no one – VMI cadet, faculty, staff, nor civilian – should be subjected to the type of behavior detailed in the article. The fact that this type of behavior is reported to have come from individuals who have worn the VMI uniform is repugnant.

Your behavior, no matter online, on post, or elsewhere, is a reflection of the Virginia Military Institute. To be a VMI alumnus is synonymous with being a leader of character whether in the military, industry, politics, or civic life. As I stated upon my arrival, we define who we are as VMI.

For those cadets who have experienced sexual assault or harassment, VMI is committed to your healing and success. VMI has a number of resources available to you. Professional counselors in the Center for Cadet Counseling are always available. Additionally, Ms. Susan LeMert, the Institute's new Inspector General / Title IX Coordinator, is available to connect you with additional resources or discuss options for pursuing charges through the Title IX process or the courts.

Over the past seven years, VMI's Title IX process for reporting, investigating, and adjudicating sexual assault and harassment claims was reviewed by the U.S. Department of Education Office for Civil Rights as well as the Commonwealth of Virginia through the recent audit ordered by the Governor. Both the Office for Civil Rights and the Commonwealth found that VMI's policies and procedures are compliant with federal and state laws and regulations. The Commonwealth of Virginia's recent audit cited VMI as an "institution committed to ensuring that its cadets, faculty, and staff are free from discrimination and harassment and to responding appropriately when they are not."

At VMI, one reported rape or sexual assault is one too many. Our job as an institution is to ensure cadets have confidence that their concerns or complaints will be addressed in a timely and compassionate manner without fear of reprisal. This is my commitment to you.

*Very respectfully,
MG Wins*

In addition to the VMI Superintendent, the new Commandant of Cadets has made it clear to the Corps of Cadets through various public proclamations that he too has zero tolerance for any act of discrimination, racism and/or sexism. At the tactical (grass roots) level, the Commandant has implemented "leader teaches" with Corps leadership on VMI Standards of Conduct. These small group focus sessions include open, frank discussions (vice lectures) about what is acceptable and what is not acceptable by VMI cadets. Important to these discussions – and a change from previous administrations – is the commitment by the Commandant, as well as the Superintendent, to empower the Corps of Cadets to police/regulate themselves and subsequently hold them accountable for doing so. Cadet leadership is enthusiastically supportive of this initiative and the Commandant, along with the Inspector General, will track reported misconduct to determine if it is having the desired effect.

There is a direct correlation between drinking in barracks (a violation of VMI regulations) and the types of misconduct referenced in this recommendation. In addition to unannounced health and comfort inspections designed to discourage the unauthorized presence of alcohol in barracks, the Commandant has instituted several additional initiatives to move the alcohol demand away from Barracks. For example, he has increased General Permit and the number of open (unrestricted) weekends. Both represent opportunities for cadets to leave Post for anywhere from a couple of hours to the weekend.

Finally, as mentioned above, VMI's Institute Regulations: Part III (Blue Book), which contains VMI's rules and regulations for governing the good order and discipline within the Corps of Cadets is currently being reviewed and updated by the Commandant of Cadets. It is expected that this re-write will closely examine the penalties associated with this type of misconduct and incorporate new or increased penalties as appropriate. This project is anticipated to be completed by the end of the fall 2021 semester.

VMI's intolerance of all discriminatory, racist, or sexist acts on Post or by a member of the VMI community VMI's current Title IX and Inclusive Excellence training programs contribute to achieving the core principles below that help move VMI toward being a more inclusive, inviting, inspirational place to live, study, and train:

- **BOV OBJ 2:** To create and foster a safe, equitable, and inclusive environment for all on Post
- **BOV OBJ 3:** Assure that we maintain a safe, rigorous process for escalating issues which have even the potential to violate the Code of a Cadet
- **UAP Outcome #1:** The VMI Brand
- **UAP Outcome #2:** A VMI which is Diverse and Inclusive
- **UAP Outcome #5:** One-VMI
- **IEP Goal 2:** Climate and Intergroup Relations
 - Objective 1: Create and maintain a climate that acknowledges and celebrates diversity and employs inclusive practices throughout its daily operations, aligned with VMI's vision, mission, and values
- **IEP Goal 4:** Organizational Culture and Accountability
 - Objective 1: Develop a robust, empowered infrastructure to address longstanding institutional challenges and sustain the journey toward Inclusive Excellence.
 - Objective 2: Create a culture of evaluation and continuous improvement for administrators and senior leaders

D. VMI should augment its efforts to combat and prevent sexual violence, including (i) enact a policy that automatically and immediately places reports of misconduct into the Title IX investigation and adjudication protocol; (ii) augment support services and accommodations for victims of sexual violence; and (iii) implement a policy that requires prompt, clear, and written communication of those services and accommodations to the affected parties.

In accordance with General Order (GO) #16 (*Discrimination, Harassment, and Sexual Misconduct*) all VMI employees, for the purposes of Title IX reporting, are designated responsible employees. A responsible employee must report to the IG, all relevant information received in connection with a reported sexual misconduct incident. VMI's IG serves as the Title IX Coordinator and is responsible for overseeing the investigation of all reports of alleged discrimination, harassment, or sexual misconduct in accordance with the Grievance Procedures that are established and published

as an annex to GO 16. Therefore, the requirement for employees to report such incidents to the IG automatically puts the incident into the investigative and adjudication process.

It is important to note that under Title IX provisions, the complainant reserves the right to make a confidential report. If a survivor/victim of sexual misconduct, wishes to make a confidential report, it must be made to one of the following "confidential" employees: the Institute Physician and other medical personnel at the VMI Infirmary, counselors at the Cadet Counseling Center, or the VMI Chaplain. In order to allow the survivor/victim to "control the narrative," a confidential report will not initiate the Institute's reporting and investigative procedures until s/he gives permission to do so.

Cadets are not mandatory reporters; however, they should report alleged GO 16 violations to the IG, any member of the IG staff, the Commandant, or the Assistant Commandant for Cadet Government who also serves as an Assistant Title IX Coordinator. Other than reports made to confidential employees, reports received by all other employees from cadets must be forwarded to the IG.

If a survivor/victim is in immediate danger or needs immediate medical attention, VMI personnel are instructed to contact 911 (blue emergency lights on post connect directly to 911) or the VMI Police (540-463-9177). Certain conduct included in GO 16 violations may also be a crime under Virginia law and VMI personnel are strongly encouraged to report incidents of sexual misconduct to law enforcement, even if the reporting individual is not certain if the conduct constitutes a crime. VMI will provide assistance to survivors/victims in notifying law enforcement if the individual so chooses. Crimes involving minors must be reported to law enforcement.

Notwithstanding a complainant's request that law enforcement not be informed of an incident, the Institute is required pursuant to Virginia Code § 23.1-806 to report information about an incident to law enforcement if necessary to address an articulable and significant threat posing a health or safety emergency. This requirement is defined by the implementing regulations of the Family Educational Rights and Privacy Act, 34 C.F.R. § 99.36, and detailed in the Sexual Violence Threat Assessment provisions of the Grievance Procedures (Appendix A of GO 16).

A survivor/victim who reports sexual misconduct automatically receives information outlining resources and options. VMI's resources include, but are not necessarily limited to, access to on-Post confidential counsellors, changes in classroom schedules or barracks assignment, no-contact orders between the parties, bar from Post, escorts on Post, referral and coordination of counseling and health services, and modification of academic or training requirements. Additionally, VMI has an active Memorandum of Understanding (MOU) with Project Horizon (a local non-profit organization) for survivor/victim advocacy and support services. Services available through this MOU include confidential crisis intervention, counselling, information and referral, accompaniment to medical and legal services as requested, and transportation if needed. Every cadet is provided a Title IX resource card (see Appendix 5) that instructs them how to connect with those resources. There is a similar card available to state employees.

VMI's efforts to combat and prevent sexual violence contribute to achieving the core principles below that will help VMI move toward being a more inclusive, inviting, inspirational place to live, study, and train:

- **BOV OBJ 2:** To create and foster a safe, equitable, and inclusive environment for all on Post
- **BOV OBJ 3:** Assure that we maintain a safe, rigorous process for escalating issues which have even the potential to violate the Code of a Cadet
- **UAP Outcome #2:** A VMI which is Diverse and Inclusive
- **UAP Outcome #3:** Committed to Honor
- **UAP Outcome #5:** One-VMI
- **IEP Goal 2:** Climate and Intergroup Relations
 - Objective 1: Create and maintain a climate that acknowledges and celebrates diversity and employs inclusive practices throughout its daily operations, aligned with VMI's vision, mission, and values
- **IEP Goal 4:** Organizational Culture and Accountability
 - Objective 1: Develop a robust, empowered infrastructure to address longstanding institutional challenges and sustain the journey toward Inclusive Excellence.
 - Objective 2: Create a culture of evaluation and continuous improvement for administrators and senior leaders.

E. The General Assembly should consider amending Va. Code § 23.1-808 to remove the carve-out for VMI, which discourages candid reporting of sexual misconduct at VMI.

The General Assembly was unable to take up this issue in the Aug 2021 special session. The next opportunity for them to do so is in the 2022 regular session that runs from 12 Jan – 12 Mar 2022. VMI's Director of Government Relations continues to track GA actions related to VMI and the Institute will respond appropriately to requests for information beyond that included in the quarterly reports.

F. Whether or not the General Assembly amends Va. Code § 23.1-808's VMI carve-out, VMI should consider amending General Order 16's amnesty provision to apply to all instances of drug or alcohol use disclosed in conjunction with a good faith report of sexual violence, consistent with the approach followed by all other Virginia higher education nonprofit institutions take.

It is important to understand that due to its military character and unique educational model, VMI is unlike other Virginia higher education nonprofit institutions. As such, it should not be required to alter authorized policies and procedures simply to conform to those dissimilar institutions. VMI has a zero-tolerance drug policy for multiple reasons: 1) drug use remains an illegal activity in the Commonwealth; 2) VMI cadets routinely operate state vehicles on the Commonwealth's roads and highways transporting other VMI cadets to academic and athletic events; 3) VMI cadets routinely conduct live fire exercises and handle other weapons that can inflict bodily harm; and 4) VMI is a training ground for future commissioned officers in our Armed Forces and the military still has a zero tolerance policy for drug use in its officer corps. Finally, and perhaps most important, the Safe-to-Report Policy, which is intended to make it easier to report sexual assault and mandated by Congress in the 2021 National Defense Authorization Act, requires commanders to disregard "minor" disciplinary misconduct a survivor/victim may have committed in the context of a sexual assault. Examples of minor infractions included in the bill are underage drinking, an unprofessional relationship with the accused or violation of other lawful orders, which can include curfews, off-limits businesses and housing policies. It does not mention drug use. The bill also requires services to take into account aggravating circumstances when deciding whether an infraction is minor. If a survivor's actions interfere with a military mission or objective; threaten another's health or safety;

or result in significant property damage, commanders are able to prosecute them.” (*Military Times*, 01 Nov 2021)

As alluded to above, there are very real consequences if/when college-aged, young adults misinterpret a blanket amnesty program that includes drug use in an environment like VMI. This misunderstanding opens the door for accident, injury, or other life-altering incidents as a result of a cadet being under the influence of drugs. As a result, when VMI considered this recommendation, it determined the risk was too great to warrant a blanket amnesty program. That said, to provide the Institute the flexibility to provide amnesty on a case-by-case basis, VMI did change to wording in GO 16 to say:

“In order to facilitate reporting, the Institute may provide amnesty to a cadet who reports an incident in violation of this policy, directed toward that cadet or another cadet, for disciplinary infractions, occurring at the time of the incident. Amnesty may not be offered if (1) the disciplinary infraction places or placed the health or safety of any other person at risk or (2) the cadet who committed the disciplinary infraction previously has been found to have committed the same disciplinary infraction. If amnesty is provided, no conduct proceedings or conduct record will result for disciplinary infractions. Amnesty for disciplinary infractions also may be offered to cadets who are witnesses in an investigation under this policy, who intervene to help others before a violation of this policy occurs, or who receive assistance or intervention. Abuse of amnesty requests may result in a decision by the Commandant not to extend amnesty to the same cadet repeatedly. Infractions that constitute honor offenses will not be considered policy violations for which amnesty may be offered under this provision.”

VMI’s GO 16, as amended in October 2021, contributes to achieving the core principles below that help move VMI toward being a more inclusive, inviting, inspirational place to live, study, and train:

- **BOV OBJ 3:** Assure that we maintain a safe, rigorous process for escalating issues which have even the potential to violate the Code of a Cadet
- **UAP Outcome #2:** A VMI which is Diverse and Inclusive
- **UAP Outcome #5:** One-VMI
- **IEP Goal 2:** Climate and Intergroup Relations
 - Objective 1: Create and maintain a climate that acknowledges and celebrates diversity and employs inclusive practices throughout its daily operations, aligned with VMI’s vision, mission, and values
- **IEP Goal 4:** Organizational Culture and Accountability
 - Objective 1: Develop a robust, empowered infrastructure to address longstanding institutional challenges and sustain the journey toward Inclusive Excellence.
 - Objective 2: Create a culture of evaluation and continuous improvement for administrators and senior leaders

G. VMI should formally study, and should consider amending or removing, the channel for reporting Title IX sexual misconduct through the Cadet Equity Association.

The Cadet Equity Association (CEA) is not a reporting channel for Title IX sexual misconduct. Any mention of the CEA taking reports of sexual misconduct was struck from GO 16 in its most recent update (October 2021) to reinforce this position. Additionally, the VMI White Book:

Cadet Government Procedures, which was updated on 1 August 2021, clearly articulates that the CEA is not to investigate incidents of sexual misconduct, rather they are to immediately report the incident to the Assistant Commandant for Cadet Government/Assistant Title IX Coordinator who notifies the IG and Commandant (see below excerpt):

H. INVESTIGATIONS:

1. Under close supervision of the Inspector General/Title IX Coordinator and the Assistant Commandant for Cadet Government, the CEA investigates matters for the General/Executive Committees and Administration as necessary.

2. Any investigation of complaints involving harassment and/or discrimination based on gender, race, religion, ethnicity, sexual orientation, or any other potential violation of GO 16 shall be investigated only to the extent designated by the Inspector General and under the oversight of the Inspector General. The CEA shall not investigate any complaint involving sexual misconduct [emphasis added]. Upon notification of any case that involves any element of discrimination, harassment, or sexual misconduct, any CEA members shall immediately notify the Assistant Commandant for Cadet Government/Assistant Title IX Coordinator who will notify the Inspector General and Commandant. Procedures are outlined in GO 16 [emphasis added].”
The challenge is that because the CEA is charged with monitoring the Post-wide climate, conducting Corps-wide education, and investigating discrimination complaints, the perception among the Corps of Cadets is that those duties encompass reporting and investigating sexual misconduct as well. Despite the fact that the VMI White Book, CEA Charter, and General Order #16 (Discrimination, Harassment, and Sexual Misconduct) all clearly state that the IG/Title IX Coordinator is responsible for the oversight and resolution of all reports of sexual misconduct the perception still persists.

The IG/Title IX Coordinator is making a concerted effort to change the Corps’ perception of sexual misconduct reporting procedures. Through the annual training classes discussed in Item 5(a) above, the Respect, Report, Support campaign and the GO 16 changes cited in recommendation 5(d) above, she is educating the Corps of Cadets on the appropriate reporting channels for sexual misconduct cases.

These changes and the resulting awareness of reporting procedures contributes to achieving the core principles below that help move VMI toward being a more inclusive, inviting, inspirational place to live, study, and train:

- **BOV OBJ 3:** Assure that we maintain a safe, rigorous process for escalating issues which have even the potential to violate the Code of a Cadet
- **UAP Outcome #2:** A VMI which is Diverse and Inclusive
- **UAP Outcome #5:** One-VMI
- **IEP Goal 2:** Climate and Intergroup Relations
 - Objective 1: Create and maintain a climate that acknowledges and celebrates diversity and employs inclusive practices throughout its daily operations, aligned with VMI’s vision, mission, and values
- **IEP Goal 4:** Organizational Culture and Accountability
 - Objective 1: Develop a robust, empowered infrastructure to address longstanding institutional challenges and sustain the journey toward Inclusive Excellence.
 - Objective 2: Create a culture of evaluation and continuous improvement for administrators and senior leaders

H. VMI should revise its door locking policy to permit cadets to lock their doors without permission and at any time.

VMI's door locking policy was revised in January 2021. In order to respect privacy while promoting safety and security, cadets are authorized to lock their doors and pull their shades at their own discretion. This new policy is being implemented in coordination with other governance practices to empower the Corps of Cadets to police itself – within the rules and regulations of the Institute – while also promoting the practice of looking out for the welfare and wellbeing of each other. The new policy is included at Appendix 6.

As further enhancement to safety and security in the VMI barracks (dormitory) VMI has also submitted a capital improvement request to install electronic door locks, replace existing with new and expanded CCTV cameras, and upgrade the information technology system required to support them.

Revisions of the door locking policy, coupled with the additional safety and security measures, contribute to achieving the core principles below that will help move VMI toward being a more inclusive, inviting, inspirational place to live, study, and train:

- **BOV OBJ 2:** To create and foster a safe, equitable, and inclusive environment for all on Post
- **UAP Outcome #2:** A VMI which is Diverse and Inclusive
- **UAP Outcome #5:** One-VMI
- **IEP Goal 2:** Climate and Intergroup Relations
 - Objective 1: Create and maintain a climate that acknowledges and celebrates diversity and employs inclusive practices throughout its daily operations, aligned with VMI's vision, mission, and values
- **IEP Goal 4:** Organizational Culture and Accountability
 - Objective 1: Develop a robust, empowered infrastructure to address longstanding institutional challenges and sustain the journey toward Inclusive Excellence.
 - Objective 2: Create a culture of evaluation and continuous improvement for administrators and senior leaders.

I. VMI should make LGBTQ issues a priority in its diversity efforts, and should make clear, and enforce, that homophobic conduct and language is unacceptable at VMI.

The CDO is exploring programming geared toward educating and bringing awareness and consciousness about this topic to the VMI community. She is currently exploring training tools available through organizations such as BiasSync.

BiasSync is a science-based solution designed to help organizations more effectively assess and manage unconscious bias in the work environment. Our purpose is to create more fair and respectful workplaces. Their professional development content is educational, entertaining, and effective. These training modules, created by Emmy® Award-winning producers and experts in the field, helps individuals understand unconscious bias, how it works, and provides useful guidance on how to mitigate its impact in the workplace. (<https://biassync.com/>)

Bringing LGBTQIA+ training online, like our other Inclusive Excellence training, contributes to

achieving the core principles below that will help move VMI toward being a more inclusive, inviting, inspirational place to live, study, and train:

- **BOV OBJ 1:** To create, and foster a more diverse VMI
- **UAP Outcome #2:** A VMI which is Diverse and Inclusive
- **UAP Outcome #5:** One-VMI
- **IEP Goal 2:** Climate and Intergroup Relations
 - Objective 1: Create and maintain a climate that acknowledges and celebrates diversity and employs inclusive practices throughout its daily operations, aligned with VMI's vision, mission, and values
- **IEP Goal 4:** Organizational Culture and Accountability
 - Objective 1: Develop a robust, empowered infrastructure to address longstanding institutional challenges and sustain the journey toward Inclusive Excellence.
 - Objective 2: Create a culture of evaluation and continuous improvement for administrators and senior leaders

6. ENCOURAGE REPORTING AND TRANSPARENCY

- A. VMI should, with the involvement of the chief diversity officer, design a campaign to encourage reporting misconduct beyond simply making mechanisms and opportunities available. This campaign should be supported, demonstrated, and carried out by cadet leadership and commandant staff, among others.**

This is much bigger than simply an information campaign although that is certainly a part of this line of effort. At the heart of most of the recommendations included in Items 5 & 6 of the Barnes & Thornburg report is the need for a culture change at VMI. Cultures change and evolve over time as is evidenced by the changes presently occurring in our Nation. That said, VMI's culture has been remarkably consistent over its long history and the time has come to bring the Institute in line with the 21st Century values of inclusivity, diversity, and equity. Culture change at VMI does not mean changing the foundational elements such as honor, integrity, accountability, service, and respect that make it VMI. Those fundamentals remain sound and integral to making VMI the unique educational experience that it is; however, the Superintendent's top priority is a culture change that makes VMI more inclusive and inviting. To drive that change, in addition to the empowerment and accountability initiatives discussed in recommendation 5(c), he has initiated a strategic planning process to develop VMI's next strategic plan and directed incorporation of the Unifying Action and VMI Inclusive Excellence Plans in that process. Including those DEI focused plans in the strategic planning process will institutionalize them by assigning milestones, timelines, and most importantly, resources to the key concepts, goals, and objectives that are contained within them.

Additionally, the VMI barracks, because of its very nature, is at the heart of any change at VMI and a culture change is no different. Bringing the barracks, and with it the VMI Corps of Cadets, in line with the Superintendent's goals of acceptance and inclusivity starts with the individual cadet. This effort has already begun. As detailed in the response to recommendation 5(c) above, both the Superintendent and the Commandant have clearly and publicly – on numerous occasions and in various venues – expressed to the Corps of Cadets and the greater VMI community what is and is not acceptable behavior. These incontrovertible statements by VMI leadership establish straightforward expectations for moving VMI forward to a more diverse and inclusive environment

that is also a physically and emotionally safe place of higher learning. A major element of this campaign is empowering the Corps of Cadets to drive the change. In addition to establishing expectations, VMI leadership has been involving cadets in policy formation, regulation revision, focus groups and open-door policies to create buy-in and ownership of the change process. Once cadets have bought in and taken ownership of the process, they begin to regulate themselves and hold each other accountable for the words and deeds that violate VMI's core values and new cultural norms. This change will not occur overnight. The process was initiated in August 2021 with the return of cadet leadership; however, as stated in the Unifying Action Plan, VMI believes establishing this new culture could take up to five years.

Another key element of the effort to change the culture at VMI is the training, education, and information campaigns that combine the talents and resources of the DEI and IG/Title IX Offices as detailed throughout this report. The Institute has set aside "Superintendent's Training Time" each week on Friday morning from 11:05-12:15 to accommodate those efforts. The use of the term Superintendent's Training Time is intentional as it adds gravitas to that hour and signifies its importance to the Superintendent and the Institute.

Changing the culture at VMI, to include designing a cadet-led, Commandant supported campaign to encourage reporting of misconduct, contributes to achieving the core principles below, to help move toward being a more inclusive, inviting, inspirational place to live, study, and train:

- **BOV OBJ 3:** Assure that we maintain a safe, rigorous process for escalating issues which have even the potential to violate the Code of a Cadet
- **UAP Outcome #2:** A VMI which is Diverse and Inclusive
- **UAP Outcome #3:** Committed to Honor
- **UAP Outcome #5:** One-VMI
- **IEP Goal 2:** Climate and Intergroup Relations
 - Objective 1: Create and maintain a climate that acknowledges and celebrates diversity and employs inclusive practices throughout its daily operations, aligned with VMI's vision, mission, and values
- **IEP Goal 4:** Organizational Culture and Accountability
 - Objective 1: Develop a robust, empowered infrastructure to address longstanding institutional challenges and sustain the journey toward Inclusive Excellence.
 - Objective 2: Create a culture of evaluation and continuous improvement for administrators and senior leaders

B. Consistent with General Order 13, VMI should supplement its reporting procedures with a confidential, anonymous reporting system (to the extent permitted by law) for use by cadets, faculty, and staff to report incidents and concerns, including those involving racism or sexism. Those procedures should include, if possible, providing the reporter with information on how the report was addressed and its status, and should involve the chief diversity officer.

VMI is and has been compliant with this recommendation for more than a decade. The IG/Title IX Coordinator operates a fully anonymized telephone and email capability. A complainant, witness or other bystander that desires to report anonymously may access these capabilities through the IG website using the "**Complaints, Concerns, Suggestions**" link, by finding the nearest Title IX poster in the barracks or academic building, or by using the IG/Title IX provided resource card for

survivors/victims of any kind of discrimination, harassment, or sexual misconduct. This card lists 540-464-7702 as the anonymous hotline. (See Appendix 5)

With respect to feedback, the Office of the Inspector General is limited in its ability to investigate an anonymous report unless sufficient information is furnished to enable the IG to conduct a meaningful and fair investigation. If the complainant requests confidentiality and does not file a signed formal complaint with the IG, the Institute is also limited in the actions it is able to take, its ability to respond to the reported incident, and its ability to provide feedback. Finally, without a signed complaint and release form, FERPA prohibits the Institute from releasing any information related to a possible discrimination, harassment, or sexual misconduct case.

VMI's current procedures for anonymously reporting of GO 16 offenses contribute to achieving the core principles below, to help move VMI toward being a more inclusive, inviting, inspirational place to live, study, and train:

- **BOV OBJ 3:** Assure that we maintain a safe, rigorous process for escalating issues which have even the potential to violate the Code of a Cadet
- **UAP Outcome #2:** A VMI which is Diverse and Inclusive
- **UAP Outcome #3:** Committed to Honor
- **UAP Outcome #5:** One-VMI
- **IEP Goal 2:** Climate and Intergroup Relations
 - Objective 1: Create and maintain a climate that acknowledges and celebrates diversity and employs inclusive practices throughout its daily operations, aligned with VMI's vision, mission, and values
- **IEP Goal 4:** Organizational Culture and Accountability
 - Objective 1: Develop a robust, empowered infrastructure to address longstanding institutional challenges and sustain the journey toward Inclusive Excellence.
 - Objective 2: Create a culture of evaluation and continuous improvement for administrators and senior leaders.

C. VMI should collect and publish detailed financial information from the Alumni Agencies on how funds are raised and spent, including the source of the funds and any earmarks.

The VMI Alumni Agencies, comprised of the VMI Foundation, Inc., the VMI Alumni Association and the VMI Keydet Club are registered 501(c)(3)'s. The Agencies are separate and distinct (independent) from the Virginia Military Institute and each of the individual entities is governed by their own oversight board. That said, in the same spirit of cooperation as articulated by the BOV President, they provided the following response:

- The VMI administration receives a copy of the Alumni Agencies Audit. The Alumni Agencies are a component unit in the Virginia Military Institute Audit (see page 12 and 14 of VMI Audit). Financial information is also available in our 990 (available on our web site) or Guidestar.
- VMI can produce a detailed ledger of every dollar received from the Alumni Agencies.

7. RECOGNIZE AND CELEBRATE OTHER CULTURES

- A. VMI should evaluate its policy on appropriate hairstyles within the Corps of Cadets and consider adopting Army Regulation 670-1 in this respect. The current policy appears to**

produce different and unfair results for cadets of color, and in particular African American women.

VMI Regulations state that "the VMI Corps of Cadets shall consist of all cadets enrolled in the Institute, and it shall be organized as an infantry unit, generally in accord with regulations of the United States Army." As such, Army Regulations (AR) related to personal grooming standards apply.

Army Regulation (AR) 670-1 acknowledges cultural differences in its established grooming standards and VMI adopted this regulation effective with the start of the fall 2021 semester. Two noted exceptions: 1) facial hair is still not acceptable within the Corps of Cadets except for documented medical conditions, and 2) new female cadets will wear their hair in a bun until breakout (end of the ratline) to have a unique hair style analogous with that required of the male new cadets. These "shared experiences" are part of developing class unity and transforming a collection of individuals into a class of VMI cadets.

VMI's adoption of AR-670-1 contributes to achieving the core principles below that will help move VMI toward being a more inclusive, inviting, inspirational place to live, study, and train:

- **BOV OBJ 1:** To create, and foster a more diverse VMI
- **UAP Outcome #2:** A VMI which is Diverse and Inclusive
- **UAP Outcome #3:** Committed to Honor
- **UAP Outcome #5:** One-VMI
- **IEP Goal 2:** Climate and Intergroup Relations
 - Objective 1: Create and maintain a climate that acknowledges and celebrates diversity and employs inclusive practices throughout its daily operations, aligned with VMI's vision, mission, and values
- **IEP Goal 4:** Organizational Culture and Accountability
 - Objective 1: Develop a robust, empowered infrastructure to address longstanding institutional challenges and sustain the journey toward Inclusive Excellence.
 - Objective 2: Create a culture of evaluation and continuous improvement for administrators and senior leaders

B. VMI should appoint an external committee to explore, determine, and make recommendations on formal actions that VMI should take to honor diverse individuals or entities on post, such as the creation of monuments, the naming of buildings, and the establishment of awards.

While VMI understands the benefit derived from an external committee to explore, determine, and make recommendations on how to honor diverse individuals and/or entities, the Institute prefers addressing this recommendation internally initially.

The personnel changes in key leadership positions at the Institute brings with it new and fresh perspectives through which DEI issues and initiatives are examined. In addition to the VMI Inclusive Excellence – ONE Virginia Plan discussed in Item 1(a) above, on 8 September 2021, the Institute seated the Inclusive Excellence Committee. The charter of that committee is included at Appendix (1).

VMI expects this committee, in collaboration with the CMNRC discussed in Item 4(a) above, to address initiatives related to honoring diverse individuals and/or entities on the VMI Post. It is also within the purview of the committee co-chairs to add temporary members from groups such as the Promaji Club or Global Perspectives Club (international cadets) when addressing initiatives related to this recommendation.

The establishment of the Inclusive Excellence Committee contributes to achieving the core principles below that will help move VMI toward being a more inclusive, inviting, inspirational place to live, study, and train:

- **BOV OBJ 1:** To create, and foster a more diverse VMI
- **UAP Outcome #2:** A VMI which is Diverse and Inclusive
- **UAP Outcome #5:** One-VMI
- **IEP Goal 2:** Climate and Intergroup Relations
 - Objective 1: Create and maintain a climate that acknowledges and celebrates diversity and employs inclusive practices throughout its daily operations, aligned with VMI's vision, mission, and values
- **IEP Goal 3:** Education and Scholarship
 - Objective 1: Offer courses, curricula, art/artistic events, and learning opportunities at the undergraduate level that achieve DEI learning goals
 - Objective 2: Increase the cultural competencies of faculty and staff
- **IEP Goal 4:** Organizational Culture and Accountability
 - Objective 1: Develop a robust, empowered infrastructure to address longstanding institutional challenges and sustain the journey toward Inclusive Excellence
 - Objective 2: Create a culture of evaluation and continuous improvement for administrators and senior leaders

8. ADDRESS TENSIONS BETWEEN ATHLETES AND NON-ATHLETES

- A. In light of the apparent role that the athlete/non-athlete divide plays in racial tensions at VMI, VMI should formally evaluate its status as a Division I institution, especially given its size and its priority of achieving a cohesive Corps.**

One of the five outcomes of the Superintendent's Unifying Action Plan is competing and winning. Winning means nothing unless the competition itself is demanding and pushes us beyond our self-imposed limits. Winning means everything when you face a difficult opponent, but you come together as a well-led team that rises above individual limitations to compete and win at a level not expected. The trials, tribulations, and cherished victories this level of completion creates builds men and women of character. It teaches them to "never say die" and to persevere to the end. It builds grit and determination and ensures our cadets possess those key life and leadership skills when they depart VMI.

Additionally, competing at the highest levels also helps VMI move forward in diversifying the Corps of Cadets. Competing at the Division I level allows us to attract high quality minority and women athletes that would not otherwise consider VMI if we dropped to a lower level. It also allows us to continue to recruit top-notch athletes who could not attend college at all without the benefit of an athletic scholarship. As VMI moves forward toward a more diverse and inclusive Corps of Cadets, this demographic is incredibly important to ensuring our success. Said another

way, competing in Division I athletics affords VMI a win as our march forward to inclusive excellence incorporates diverse leaders from all three elements of the VMI experience. For these reasons, VMI will remain a Division I school.

Competing in NCAA Division I athletics contributes to achieving the core principles below that will help move VMI toward being a more inclusive, inviting, inspirational place to live, study, and train:

- **BOV OBJ 1:** To create, and foster a more diverse VMI
- **UAP Outcome #1:** The VMI Brand
- **UAP Outcome #2:** A VMI which is Diverse and Inclusive
- **UAP Outcome #4:** A VMI that Competes to Win
- **UAP Outcome #5:** One-VMI
- **IEP Goal 2:** Climate and Intergroup Relations
 - Objective 1: Create and maintain a climate that acknowledges and celebrates diversity and employs inclusive practices throughout its daily operations, aligned with VMI's vision, mission, and values.

B. VMI should create a written, detailed, measurable plan to bridge the athlete/non-athlete divide. The plan should specifically address racial attitudes and tensions related to the athlete/non-athlete divide and include measures to address it.

Items 8(B) – 8(C) are closely related and VMI is committed to address these issues and devise solutions through a joint committee that includes administrators, cadet athletes and cadet non-athletes. This approach acknowledges the fact that without cadet buy-in and ownership of the challenge and proposed solutions, not only will the problem not be solved, it might be exacerbated. Therefore, this joint committee allows ideas to bubble up from within the Corps – i.e., those most intimate with the issue – to the committee where they can be vetted for feasibility, acceptability, and suitability. Including cadets as voting members of the committee makes them advocates for those approved actions with the Corps of Cadets. The Committee is co-chaired by the Commandant of Cadets and the Athletic Director, who held their first meeting on 1 November 2021.

The plan of action and milestones created by the Closing the Gap Committee contributes to achieving the core principles below that will help move VMI toward being a more inclusive, inviting, inspirational place to live, study, and train:

- **BOV OBJ 1:** To create, and foster a more diverse VMI
- **UAP Outcome #2:** A VMI which is Diverse and Inclusive
- **UAP Outcome #4:** A VMI that Competes to Win
- **UAP Outcome #5:** One-VMI
- **IEP Goal 1:** Access and Success
 - Objective 2: Increase retention and academic success of historically underrepresented and underserved undergraduate students.
- **IEP Goal 2:** Climate and Intergroup Relations
 - Objective 1: Create and maintain a climate that acknowledges and celebrates diversity and employs inclusive practices throughout its daily operations, aligned with VMI's vision, mission, and values.
- **IEP Goal 4:** Organizational Culture and Accountability

- Objective 1: Develop a robust, empowered infrastructure to address longstanding institutional challenges and sustain the journey toward Inclusive Excellence.
- Objective 2: Create a culture of evaluation and continuous improvement for administrators and senior leaders.

C. VMI should develop and implement measures to make the athlete and non-athlete experience more uniform, and to build mutual understanding and appreciation for each group's sacrifices and contributions to VMI.

See answer for 8(B).

D. VMI should increase opportunities for athlete/non-athlete interaction, such as through roommate assignments and the dyke system. In particular, VMI should consider ways the dyke system might be reformed to avoid passing down anti-athlete bias and to avoid situations where athletes pair only with other athletes.

The military nature of VMI necessitates a college experience that is awash with rules and regulations that dictate nearly everything a VMI cadet does on a daily basis. The benefits derived from a system such as this are evidenced by the success of the Institute's graduates. That said, dictating who a cadet must live with beyond their rat (freshman) year eliminates freedom of choice and is an extreme that is not necessary to address the permit/non-permit situation at VMI. The pros of being able to select your own roommates to help you through the 4-year VMI experience far outweigh any cons.

Similarly, dictating who a first classman (senior) will mentor, vice allowing that individual to choose based on similar likes, dislikes, academic major, ROTC affiliation and etc. is not conducive to a healthy mentor relationship. Importantly, this issue is not nearly as significant as the Barnes & Thornburg report might suggest. On average, over the last three years, only 18.4% of incoming (Rat) NCAA athletes had a first class (senior) NCAA athlete as his or her dyke. Of those, 94% of them had a dyke that was on the same athletic team. A mentor program, by its very nature, is designed to pair experienced, successful members of an organization or profession with new or less experienced members of that same organization or profession for the express purpose of ensuring their success and the future viability of the organization. Taking that support network away from inbound NCAA athletes neither aids them nor eliminates the supposed issues pointed out in this report. Rather, it exacerbates the issues by setting them up for failure since they would lose the benefit of having a mentor that is intimately familiar with the academic, athletic, and military challenges the rat will face based on the fact that their dyke experienced and successfully endured similar circumstances.

VMI's current policies for room assignment and dyke selection contribute to the overall success of VMI's cadets over the course of their cadetship, as well as achieving the core principles below that will help move VMI toward being a more inclusive, inviting, inspirational place to live, study, and train:

- **BOV OBJ 1:** To create, and foster a more diverse VMI
- **BOV OBJ 2:** To create and foster a safe, equitable, and inclusive environment for all on Post
- **UAP Outcome #2:** A VMI which is Diverse and Inclusive
- **UAP Outcome #4:** A VMI that Competes to Win

- **UAP Outcome #5: One-VMI**
- **IEP Goal 1: Access and Success**
 - Objective 2: Increase retention and academic success of historically underrepresented and underserved undergraduate students
- **IEP Goal 2: Climate and Intergroup Relations**
 - Objective 1: Create and maintain a climate that acknowledges and celebrates diversity and employs inclusive practices throughout its daily operations, aligned with VMI's vision, mission, and values
- **IEP Goal 4: Organizational Culture and Accountability**
 - Objective 1: Develop a robust, empowered infrastructure to address longstanding institutional challenges and sustain the journey toward Inclusive Excellence
 - Objective 2: Create a culture of evaluation and continuous improvement for administrators and senior leaders.

E. VMI should establish uniform guidelines for recruiting athletes, requiring transparency and promotion of the VMI experience. VMI should require all athletics personnel and other recruiting personnel to follow them, and should verify compliance.

VMI adheres to an "*Admissions Guidelines for Athletic Coaches*" that prescribes administrative requirements for recruiting and signing prospective athletes, as recently updated on 8 November 2021. To supplement these required procedures, the Athletic Department is developing a "*Recruiting Best Practices Guide*."

This guide will establish best dates for recruiting visits, detail admissions standards, incorporate existing videos highlighting all aspects of the cadet experience, and require coaches to utilize the S-5 cadet staff to conduct the Post tours during recruiting visits. These efforts standardize recruiting practices and visits, as well as expose prospective cadet athletes to all aspects of the cadet experience, thereby enabling them to make informed decisions about coming to VMI.

Complying with the Admissions' Office Athletic Recruiting Guidelines and Developing an Athletic Recruiting Best Practices Handbook contributes to achieving the core principles below that help move VMI toward being a more inclusive, inviting, inspirational place to live, study, and train:

- **BOV OBJ 1:** To create, and foster a more diverse VMI
- **UAP Outcome #1:** The VMI Brand
- **UAP Outcome #2:** A VMI which is Diverse and Inclusive
- **UAP Outcome #4:** A VMI that Competes to Win
- **UAP Outcome #5:** One-VMI
- **IEP Goal 1: Access and Success**
 - Objective 1: Achieve increased student enrollment from historically underrepresented and underserved populations.

Virginia Military Institute

Quarterly Report 1 — July 1, 2021 – December 15, 2021

Appendix 1

Inclusive Excellence Committee Structure

Mission

Virginia Military Institute (VMI) strives to explore, enhance, and respond to the diversity experience of cadets, staff, and faculty on the post.

We will support creating an inclusive, equitable, culturally competent, and supportive atmosphere by engaging individuals across post on matters of DE&I and Inclusive Excellence and making recommendations to the Superintendent, via the Chief Diversity Officer.

Purpose

The Inclusive Excellence Committee will guide and hold the Institute accountable for integrating the Inclusive Excellence-One Virginia Plan in all aspects of VMI.

Definitions

Diversity: Understanding the uniqueness of each person based on a collection of human attributes, cultures, traditions, learning styles, etc. As an institution of higher education with a military foundation, we also adopt the definition of diversity from the Military Leadership Diversity Commission- Diversity is recognizing, appreciating, respecting, and utilizing various human attributes. Diversity creates performance advantages through the synergy of diverse ideas. The following are the most common individual differences referenced when assessing diversity; Age, Ethnicity, Gender/Gender Identity, Physical Ability, Race, Religion/Spiritual Beliefs, Sexual Orientation, and Socio-Economic Status.

Equity: refers to fairness and justice and is distinguished from equality: Whereas equality means providing the same to all, equity means recognizing that we do not all start from the same place and must acknowledge and make adjustments to address historical and existing discrimination. Inequities happen when unfair or biased practices, policies, or situations contribute to a lack of equality. Equity must permeate all practices, policies, and procedures for every constituent.

Inclusion: Inclusion means valuing all members of a community. Inclusion is manifested by bringing traditionally excluded individuals and groups into activities, policies, and decision-making processes in a fashion that shares power, privilege, and affirms one's culture. The result of inclusion is an institution that promotes belonging and values the knowledge of all people.

Cultural Competence: How institutions and organizations can ethically and effectively participate in affirming the values of worth and preserving individuals' dignity. Cultural competence requires an understanding of one's own cultural values and worldview.

Committee Members

Committee membership will be voluntary. The committee will have an average of 10 members including, but not limited to teaching and research faculty, professional faculty, administrative faculty, classified staff, and cadets. If the committee has an excess of volunteers, members will be selected by the Superintendent's Office, or designee.

Virginia Military Institute

Quarterly Report 1 — July 1, 2021 – December 15, 2021

Appendix 1

Scope

1. The committee will guide the work of inclusive excellence at the Institute through the following means:
2. Evaluating and making recommendations on the implementation of the VMI Inclusive Excellence-One Virginia Plan.
3. Providing input on institutional policies and procedures to address diversity, equity, and inclusion issues and making recommendations to the Superintendent, via the Chief Diversity Officer as appropriate.
4. Evaluating and recommending solutions where inequities exist.
5. Facilitating briefings and consultations with administration (Policy Group & IPC) regarding DE&I and inclusive excellence initiatives.
6. Seeking regular feedback from cadets and employees to inform decision-making and understand opportunities for improvement about DE&I and inclusive excellence.
7. Communicating the work of the committee with the VMI community.

Committee Creation

In May of 2020, in light of allegations made toward VMI and its desire continue to evolve in this diverse society, Superintendent Major General Cedric T. Wins published the Unifying Action Plan (UAP), the VMI Inclusive Excellence-One Virginia Plan, quickly followed. The Inclusive Excellence Committee supports the spirit of those documents' and reaffirms VMI's commitment to creating an environment of belonging.

Based on the institute's need to infuse DE&I and Inclusive Excellence into every community area, this committee's scope will also consider the Barnes & Thornburg document recommendations.

Relationship to Other Committees

The work of this committee will speak to the Policy Group, Institutional Planning Committee, and Academic Committee.

Membership

The Diversity, Equity and Inclusion Committee includes 10 members with the following roles and membership structure:

Chair Positions

- 2 Co-chairs Including the CDO and 1 new co-chair selected each year. A new Co-chair is appointed by the Committee at the end of the academic year, with the new chair beginning the following academic year. A Co-chair must be appointed from within the Inclusive Excellence Committee, having served at least one year on the committee, except for its inaugural year. A Co-chair can be only be appointed twice with a 5 years (a year is defined as September-May).
- Co-chairs should not be from the same employee type (Teaching/Research Faculty, Professional Faculty, Administrative Faculty, and Classified, and Cadets).

Virginia Military Institute

Quarterly Report 1 — July 1, 2021 – December 15, 2021

Appendix 1

Volunteer Member Positions

- Volunteer Member positions are employees serving two-year terms, which may be renewed. Terms are staggered.
- Members are from:
 - 2 Classified representatives (one member rotates off each year)
 - 2 Teaching/Research Faculty representatives (one member rotates off each year)
 - 1 Professional Faculty representatives
 - 2 Administrative Faculty representative (one member rotates off each year)
 - 1 Cadet representative

Assigned Positions

Assigned positions are employees and students identified by department leads based on position. Depending on the department, these individuals may serve for a longer period:

- 1 Disability representative, or a representative with knowledge of ADA compliance
- 1 Associated Student Government student representative (one-year term)

At-Large Positions

The At-Large position is an employee serving a two-year term, which may be renewed. This position is for an individual from a systemically non-dominant population.

- 1 At-large representative

Member Expectations/Commitment

- Membership terms are limited with the option for renewal. The Inclusive Excellence Committee year coincides with the VMI academic year (September to June).
- Members are expected to commit an average of four hours per month to the Inclusive Excellence Committee. The committee meets twice a month plus scheduled events.
- Members must attend Inclusive Excellence Committee meetings and be prepared to engage. Meetings are the second and fourth Wednesday of the month from 1105-1215.
- Members are expected to meet with their colleagues, or complete assigned tasks outside of Inclusive Excellence Committee meetings, and share information with Inclusive Excellence Committeemembers.

Members are expected to participate and attend Inclusive Excellence Committee -sponsored events, trainings, and retreats whenever possible.

Meeting Schedule

Meetings will be held twice a month for its inaugural year, and then at least once a month in proceeding years.

Virginia Military Institute
Quarterly Report 1 — July 1, 2021 – December 15, 2021

Appendix 2

DEI Dashboard

VMI Diversity: Enrollment Trend									
All Enrollment (N)	5-yr Sparkline Graph	10 Year avg (2010 2011)	2016-17	2017-18	2018-19	2019-20	2020-21	VA Public Univ Median	Academies & SMCs Median
Full-Time Cadets (N)									
Men		1,569	1,713	1,722	1,685	1,698	1,698		
Women		1,425	1,518	1,516	1,467	1,459	1,478		
Non-resident Alien		144	195	206	218	239	220		
Students of Color		27	27	28	32	30	31		
American Indian/Alaska Native		217	316	337	357	367	391		
Asian		6	10	9	8	11	7		
Black or African American		74	72	72	75	76	83		
Hispanic/Latinx		80	104	104	108	102	99		
Native Hawaiian/Pacific Islander		57	100	122	125	129	142		
Two or more races		0	7	5	6	8	9		
Full-Time Cadets %									
Men		91%	89%	88%	87%	86%	87%	42%	75%
Women		9%	11%	12%	13%	14%	13%	58%	25%
Non-resident Alien		2%	2%	2%	2%	2%	2%	2%	1%
Students of Color		14%	19%	20%	22%	22%	23%	26%	28%
American Indian/Alaska Native		0%	1%	1%	0%	1%	0%	0%	0%
Asian		5%	4%	4%	5%	5%	5%	4%	6%
Black or African American		5%	6%	6%	7%	6%	6%	10%	7%
Hispanic/Latinx		4%	6%	7%	8%	8%	9%	7%	10%
Native Hawaiian/Pacific Islander		0%	0%	0%	0%	0%	1%	0%	0%
Two or more races		0%	1%	1%	2%	2%	3%	5%	5%

VA Public Universities data are from fall 2019 (NCES)

Non-resident Aliens are excluded from the denominator in the percentage calculation.

Students of Color Comparisons = median % of all non-White students, excluding NRAs and Unknowns.

Academies & SMCs include USMA, USNA, USAFA, The Citadel, and Norwich.

Virginia Military Institute

Quarterly Report 1 — July 1, 2021 – December 15, 2021

Appendix 2

VMI Diversity: Full-Time Teaching/Research Faculty Trend									
Measures	5-yr Sparkline Graph	7 years ago (2012-13)	2015-16	2016-17	2017-18	2018-19	2019-20	VA Public Univ. Median	Academies & SMCs Median
Full-Time Faculty (N)			136	136	138	143	143		
Men			96	94	91	97	98		
Women			40	42	47	46	45		
Non-Resident Alien									
Faculty of Color			16	18	20	19	19		
American Indian/Alaska Native									
Asian			12	14	16	15	15		
Black or African American			4	4	4	4	4		
Hispanic/Latinx									
Native Hawaiian/Pacific Islander									
Two or more races									
Full-Time Faculty (%)									
Men			71%	69%	66%	68%	69%	54%	
Women			29%	31%	34%	32%	31%	46%	
Non-Resident Alien								4%	
Faculty of Color			12%	13%	14%	13%	13%	18%	
American Indian/Alaska Native								<0.5%	
Asian			9%	10%	12%	11%	11%	10%	
Black or African American			3%	3%	3%	3%	3%	4%	
Hispanic/Latinx								3%	
Native Hawaiian/Pacific Islander									
Two or more races								1%	

VA Publics data are from W&M's diversity dashboard.

Virginia Military Institute

Quarterly Report 1 — July 1, 2021 – December 15, 2021

Appendix 2

VMI Diversity: Part-Time Teaching/Research Faculty Trend									
Measure	5-Yr Sparkline Graph	7-Year Avg (2015-16)	2015-16	2016-17	2017-18	2018-19	2019-20	Virginia Univ. Median	Academics & SMG Median
Part-Time Faculty (N)			65	71	76	66	53		
Men			47	50	53	46	35		
Women			18	21	23	20	18		
Non-Resident Alien			6	7	6	7	7		
Faculty of Color			4	4	4	4	4		
American Indian/Alaska Native			0	1	0	1	1		
Asian			2	2	2	2	2		
Black or African American			0	1	0	1	1		
Hispanic/Latinx			2	2	2	2	2		
Native Hawaiian/Pacific Islander			0	0	0	0	0		
Two or more races			0	0	0	0	0		
Part-Time Faculty (%)									
Men			72%	70%	70%	70%	66%		
Women			28%	30%	30%	30%	34%		
Non-Resident Alien			9%	10%	8%	11%	13%		
Faculty of Color			6%	6%	5%	6%	8%		
American Indian/Alaska Native			0%	1%	0%	2%	2%		
Asian			3%	3%	3%	3%	4%		
Black or African American			0%	1%	0%	2%	2%		
Hispanic/Latinx			3%	3%	3%	3%	4%		
Native Hawaiian/Pacific Islander			0%	0%	0%	0%	0%		
Two or more races			0%	0%	0%	0%	0%		

Virginia Military Institute

Quarterly Report 1 — July 1, 2021 – December 15, 2021

Appendix 2

VMI Diversity: Full-Time Admin/Professional Trend									
Measures	5-yr. Sparkline Graph	7 years ago (2012-13)	2015-16	2016-17	2017-18	2018-19	2019-20	VA Public Univ. Median	Academics & SMCS Median
Full-Time Admin/Professional (N)									
Men			151	170	166	163	150		
Women			108	122	119	117	107		
Non-Resident Alien			43	48	47	46	43		
Faculty of Color			10	13	15	15	12		
American Indian/Alaska Native			0	0	0	0	1		
Asian			1	1	1	3	3		
Black or African American			7	11	13	11	8		
Hispanic/Latinx			2	1	1	1	0		
Native Hawaiian/Pacific Islander									
Two or more races									
Full-Time Admin/Professional (%)									
Men			72%	72%	72%	72%	71%		
Women			28%	28%	28%	28%	29%		
Non-Resident Alien			7%	8%	9%	9%	8%		
Faculty of Color			1%	1%	1%	2%	2%		
American Indian/Alaska Native			5%	6%	8%	7%	5%		
Asian			1%	1%	1%	1%	0%		
Black or African American			1%	1%	1%	1%	0%		
Hispanic/Latinx									
Native Hawaiian/Pacific Islander									
Two or more races									

Virginia Military Institute

Quarterly Report 1 — July 1, 2021 – December 15, 2021

Appendix 2

VMI Diversity: Classified Employee Trend							
Measures	5-yr. Sparkline Graph	7 years ago (2012-13)	2015-16	2016-17	2017-18	2018-19	2019-20
Classified (N)							
Men			321	328	349	320	290
Women			147	153	158	144	126
Non-Resident Alien			174	175	191	176	164
Classified of Color			14	13	13	13	12
American Indian/Alaska Native							
Asian			1	1	2	2	2
Black or African American			11	11	10	11	10
Hispanic/Latinx			1	1	1	0	0
Native Hawaiian/Pacific Islander			1	0	0	0	0
Two or more races							
Classified (%)							
Men			46%	47%	45%	45%	43%
Women			54%	53%	55%	55%	57%
Non-Resident Alien							
Classified of Color			4%	4%	4%	4%	4%
American Indian/Alaska Native							
Asian			0%	0%	1%	1%	1%
Black or African American			3%	3%	3%	3%	3%
Hispanic/Latinx							
Native Hawaiian/Pacific Islander							
Two or more races							

Appendix 3

Excerpt from Honor System Poster/Charter that defines Honor Code Offenses and hangs in every cadet room and VMI classroom:

GENERAL POLICIES

It is inconsistent with a code of personal honor to have written rules as the sole basis of determining honorable conduct. **Any action detrimental to the honor of the Corps in accordance with the custom and usage of the Corps shall be considered a violation of this Code and shall be judged accordingly.**

The following are offered as guides only:

1. **Meaning of "Certified"** - The word "Certified," when applied to a cadet's act and statement, **IMPLIES RELIABILITY, VALIDITY AND COMPLETE TRUTH. DECEITFUL ACTS OR STATEMENTS, HALF TRUTHS, EVASIVE ANSWERS, OR QUIBBLING WILL NOT BE TOLERATED.**
 - a. **Investigations and Trials** - If a cadet, other than the accused cadet, is involved in an Honor Court investigation or trial in any capacity, that cadet is certified, meaning that disclosing any information regarding the investigation or trial is an honor violation in itself.
 - b. **Official Statements** - All official statements, written or oral, are certified. An official statement is defined as one made to an officer of the Institute, an instructor, a member of the guard on duty, or any person acting in an official capacity.
 - c. **Delinquencies** - Members of the guard and other cadets acting in an official capacity are certified to transmit accurately to the proper authority all reports transmitted to them by other persons acting in official capacities. **WHEN REPORTING DELINQUENCIES AND ANSWERING REPORTS, ALL CADETS ARE CERTIFIED TO MAKE A FULL, CLEAR, AND COMPLETE REPORT TO THE PROPER AUTHORITY.**
 - d. **Permits** - Obtaining furloughs or permits on false pretenses is a violation of the Honor Code.
 - e. **"All Right" Status** - Cadets are "All Right" when they are present for duty, or absent from their place of duty but at an authorized place at an authorized time. In all cases, the responsibility for determining status rests solely and specifically upon the individual cadet.
 - f. **Roll Calls** - When a report of the roll at any official duty is given, the report is certified correct in its entirety. In academic sections, the section marcher is part of the section, and certified for the accountability of the entire section until the instructor receives the report.
 - g. **Official Records** - Stealing, destroying or changing in any manner any official record with intent to deceive is a violation of the Honor Code.
2. **Lying** - Lying is making an oral or written statement that a cadet knows to be false with the intent to deceive another person for the purpose of personal gain or advantage. Any certification, official statement, or other statement which may be construed as "lying" defined above, shall, if **subsequently** discovered by its maker to be false in any significant particular, be properly corrected by a prompt report to the person to whom the certification, etc. was originally made. In this situation, no violation of the Honor Code shall be deemed to have occurred. However, this does not apply to situations in which statements were made with the intent to deceive and are corrected only when the dishonest act was discovered.
3. **Cheating** - Cheating is receiving unauthorized aid on work for grade. Examples of unauthorized

Virginia Military Institute

Quarterly Report 1 — July 1, 2021 – December 15, 2021

Appendix 3

aid include but are not limited to copying of another cadet's work, using sources without proper citation, i.e. plagiarism, and using unauthorized electronic devices such as a cell phone or a computer when completing work for grade. **Work for Grade** – “Work for grade” is defined as any work presented to an instructor for a formal grade or undertaken in satisfaction of a requirement for successful completion of a course or degree requirement. All work submitted for grade is considered the cadet's own work. “Cadet's own work” means that he or she has composed the work from his or her general accumulation of knowledge and skill *except as clearly and fully documented* and that it has been composed especially for the current assignment. **Each cadet bears the responsibility for familiarizing himself or herself thoroughly with the Work for Grade policies stated in the Institute Academic Regulations, with any supplementary statement regarding work for grade expressed by the academic department in which he or she is taking a course, and with any special conditions provided in writing by the professor for a given assignment. Violation of Work for Grade policies is a violation of the Honor Code.**

4. **Stealing** - Stealing is taking any property from its true owner with the intent of depriving them of ownership, use or benefit of said property, or of appropriating it to the use of someone other than the true owner.
5. **Instigation** - It is a violation of the Honor Code for a cadet to attempt to influence another cadet to violate his/her honor.
6. **Malingering** - To feign illness so as to avoid duty is a violation of the Honor Code.
7. **Quibbling** - Oral or written statements that are only partially true, evasive, or otherwise misleading made with the intent to deceive.
8. **Toleration** - **A CADET WHO HAS KNOWLEDGE OF A BREACH OF THE HONOR CODE, AND WHO DOES NOT REPORT THE SAME IS GUILTY OF TOLERATION. TOLERATION IS A VIOLATION OF THE HONOR CODE.**

Virginia Military Institute

Quarterly Report 1 — July 1, 2021 – December 15, 2021

Appendix 3

Excerpt from Honor Court SOP re: Education (page 40):

ANNEX N

EDUCATION

General: To fulfill the goal of developing honorable cadets at VMI, education and training are key elements. This annex establishes general guidelines to be used to educate the VMI Corps of Cadets regarding the rules and regulations of the Honor Code and the Honor System.

Education: The VMI Honor Court is responsible for educating the Corps about the functions of the Honor System and the ways in which it is enforced. This process of education starts each year with the incoming Rats. The Vice President for Education, along with the other members of the VMI Honor Court, determines how the Rats are to be indoctrinated into the VMI Honor System. The Honor Court often holds meetings with the entire “Rat Mass” and also ones in which Court members meet with individual companies. In either case, the goal is to explain the VMI Honor System. To monitor progress and to ensure that the Rats understand the workings of the VMI Honor System, quizzes are often administered. The Court can also use any other technique to educate that it feels would be beneficial to the “Rat Mass.”

It is also the responsibility of the VMI Honor Court to ensure that the rest of the Corps remains abreast of the workings of their Honor System. The Court disseminates information related to changes in *Blue Book* regulations and permits that impact the Honor System in an effort to ensure that each cadet understands their responsibilities. This information is typically conveyed to the Corps via email messages from the Honor Court President. Occasionally, when there seems to be confusion or more urgency surrounding an issue, the Court will convene a mass meeting with the entire Corps or several meetings with smaller sub-units of the Corps. In recent years the Court has also played a key role in helping the Center for Leadership and Ethics host an annual Honor Conference. These conferences are designed to raise awareness about the epidemic of dishonesty that permeates all facets of life from education to politics. They are intended engage attendees in conversations about possible solutions and how they can contribute.

Appendix 4

VIRGINIA MILITARY INSTITUTE

Cadet Training Guide for Inclusive Excellence



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Virginia Military Institute

Quarterly Report 1 — July 1, 2021 – December 15, 2021

Appendix 4

This workbook compiles curated InclusiveExcellence trainings designed for Virginia Military Institute. Trainings are intentional in an effort to deliver direct engagement to give cadets a better understanding of cultural competence.

Virginia Military Institute

Quarterly Report 1 — July 1, 2021 – December 15, 2021

Appendix 4

TABLE OF CONTENTS

Section 1: Building Connections	
Cultural Pursuit.....	5
Diversity Bingo.....	7
“How Comfortable am I”?.....	8
Whom to Leave Behind.....	10
Section 2: Know Thyself	
Respect Activity.....	12
Prejudice.....	13
Are You What You Eat.....	14
Circles of My Multicultural Self.....	15
Class & Poverty Awareness Quiz.....	18
Connections.....	22
Lemonheads & Whoppers: Is Your Everyday Life Really Diverse?.....	26
My Personality Tree.....	28
Section 3: Type Casting	
Crossing the Line.....	33
American Disabilities Association & Reasonable Accommodations.....	35
Diversity Beans.....	36
First Thoughts.....	37
Personal Reflections.....	38
Four Corners Exercise.....	39
Journey’s Privilege Exercise: “The American Dream”.....	41
Target / Non-Target.....	44
The Complexity of Sexual Orientation.....	50
Section 4: Inclusion: Use the Lessons	
Breaking Down the Barriers Worksheet.....	53

Virginia Military Institute

Quarterly Report 1 — July 1, 2021 – December 15, 2021

Appendix 5

If you are a victim of any kind of discrimination, harassment, or sexual misconduct—

1. Go to a safe place, find some support, and make a report.

On Post

Institute Physician and medical personnel at the VMI Infirmary (**confidential**)
Cadet Counseling (**confidential**)
Institute Chaplain (**confidential**)

Off post

Project Horizon (**confidential**)
Contact a friend or family member

Make a report:

Law enforcement (**Dial 911** or see reverse for *non-emergency*)

VMI IG/Title IX staff 540-460-5250 (**Anonymous, non-emergency, 540-464-7702**)

Silent Witness web form:

www.vmi.edu/silentwitness
(**Anonymous**)



Download the Reach Out app:

www.captivation.com
and search for Virginia Military Institute under US Colleges & Universities.



2. Preserve the evidence:

Keep all text messages, pictures, online postings, video, and other electronic or documentary evidence that may corroborate a complaint.

Do not wash your hands, bathe, or douche. Do not urinate, if possible.

Do not eat, blow your nose, drink liquids, smoke, or brush your teeth if oral contact took place.

Keep the clothing worn when the assault took place. If you change clothing, keep the worn clothing in a paper bag (*evidence deteriorates in plastic*).

Do not destroy any physical evidence that may be found in the vicinity of the assault. Tell someone all the details you remember, or write them down as soon as possible.

Note: All VMI employees (unless listed as confidential on this document) are required to report discrimination, harassment, or sexual misconduct to the Inspector General's office. See GO-16 for more information.

Updated July 2021



Virginia Military Institute

Quarterly Report 1 — July 1, 2021 – December 15, 2021

Appendix 5

Contact Information

VMI Infirmary (<i>confidential</i>)	540-464-7218	
Cadet Counseling (<i>confidential</i>)		
Col. Sarah Jones	540-464-7667	
Maj. Tricia Fry	540-464-7667	
Maj. Chad Kelland	540-464-7667	
Institute Chaplain (<i>confidential</i>)		
Col. Robert Phillips	337-532-7512	
Lt. Col. John Casper	757-647-4884	
VMI Inspector General/Title IX staff		<i>ig@vmi.edu</i>
Ms. Susan LeMert	540-460-5250	<i>voice and text</i>
Anonymous (non-emergency)	540-464-7702	
Col. Sam Allen	540-464-7061	
Lt. Col. Alyssa Astphan	540-464-7095	
Lt. Col. Abbey Carrico	540-464-7276	
Ms. Haley Shotwell	540-464-7529	
Sgt. 1 st Class Christopher Bean	540-464-7413	
Law Enforcement	Emergency	911
VMI Police Department/Central Dispatch	540-464-7017	
Lexington Police Department	540-463-9177	<i>after hours</i>
		540-463-9177
County Sheriff's Office	540-463-7328	540-463-9177
Project Horizon Crisis Hotline	540-463-2594	
Anonymous report	540-464-7702	
Silent Witness	<i>vmi.edu/silentwitness</i>	



Virginia Military Institute

Quarterly Report 1 — July 1, 2021 – December 15, 2021

Appendix 6

CHAPTER 2 – Door Locking Policy

1. **OVERVIEW:** Doors to cadet rooms may be locked after taps until reveille without prior approval.
 - Sunday - Friday: Doors are authorized locked from taps to reveille the next morning.
 - Saturday: Doors are authorized locked from taps Saturday until 0800 Sunday morning.Cadets are reminded that anytime they believe there is a personal or general threat to themselves or others, it is imperative to the safety of all to report this to an OC, Institute official or member of Cadet Government or Cadet Leadership.

2. **SCHEDULED LOCKING OF DOORS:** All cadet room doors, or a subset thereof, are locked during certain key events throughout the year when a large portion of one class or the Corps in its entirety is absent from barracks. Doors are locked by Institute Officials and guard team members as a key is required to lock doors when rooms are unoccupied. Times when doors are locked include:
 - During the Thanksgiving, winter, spring and Easter (if a furlough) furloughs.
 - During Corps participation at inaugurals, Corps trips, and FTXs.
 - During Ring Figure (2nd Class rooms only).

3. **EXCEPTION TO DOOR LOCKING POLICY**
 - A cadet is authorized to lock their door outside of the above listed times without prior approval during times of emergency or whenever he or she feels threatened. In these instances, cadets must also contact the police via 9-1-1, the guard room at 464-7294 or the OC at 464-7293 after the door is locked.
 - Any cadet may request an exception to the door locking policy.
 - Cadets request exceptions from any uniformed member of the Commandant's Staff during normal business hours.
 - After business hours and on weekends, exceptions are made to the Officer-in-Charge.
 - When practical, the exception is granted for a specific duration of time.
 - Exceptions to the door locking policy are made when a concern exists that someone might enter the cadet's room without permission for the purpose of causing physical or mental harm.

Exceptions granted for longer than one week are reviewed by the Assistant Commandant for Cadet Government and/or the Commandant of Cadets.

4. VIOLATIONS

- Shades must be up after taps if the door is locked to facilitate the Officer-in-Charge's nightly inspections. Shades down with the door locked is considered a significant violation and the room occupants will be boned accordingly.

Any major conduct violations occurring behind a locked door will result in a significantly increased penalty up to and including suspension/dismissal.

5. **The Assistant Commandant for Cadet Government is the point of contact for this chapter.**

Exhibit 39

From: [Tomlin, Kathleen H](mailto:Tomlin.Kathleen.H)
To: [Carmack, Lynn W](mailto:Carmack.Lynn.W)
Subject: FW: Time Sensitive: BiasSync Agreement Discussion
Date: Tuesday, November 30, 2021 3:11:39 PM

From: Love, Jamica N <lovejn@vmi.edu>
Sent: Tuesday, November 30, 2021 3:11 PM
To: Tomlin, Kathleen H <TomlinKH@vmi.edu>
Cc: Clark, Dallas B <clarkdb@vmi.edu>; Carmack, Lynn W <carmacklw@vmi.edu>; Lackey, Tracey M <lackeytm@vmi.edu>; Lawhorne, Jeffrey L <LawhorneJL@vmi.edu>; McBean, Vaughn L <mcbeanvl@vmi.edu>
Subject: RE: Time Sensitive: BiasSync Agreement Discussion

Did you put in the edit I sent this morning? The RFP is for onsite DEI training.

From: Tomlin, Kathleen H <TomlinKH@vmi.edu>
Sent: Tuesday, November 30, 2021 2:01 PM
To: Love, Jamica N <lovejn@vmi.edu>
Cc: Clark, Dallas B <clarkdb@vmi.edu>; Carmack, Lynn W <carmacklw@vmi.edu>; Lackey, Tracey M <lackeytm@vmi.edu>; Lawhorne, Jeffrey L <LawhorneJL@vmi.edu>; McBean, Vaughn L <mcbeanvl@vmi.edu>
Subject: RE: Time Sensitive: BiasSync Agreement Discussion

It will be posted this afternoon; we received notification of MG Wins' approval at 1:51 pm.

From: Love, Jamica N <lovejn@vmi.edu>
Sent: Tuesday, November 30, 2021 1:54 PM
To: Tomlin, Kathleen H <TomlinKH@vmi.edu>
Cc: Clark, Dallas B <clarkdb@vmi.edu>; Carmack, Lynn W <carmacklw@vmi.edu>; Lackey, Tracey M <lackeytm@vmi.edu>; Lawhorne, Jeffrey L <LawhorneJL@vmi.edu>; McBean, Vaughn L <mcbeanvl@vmi.edu>
Subject: RE: Time Sensitive: BiasSync Agreement Discussion

Just wanted to make sure you got the email below. Based on your email below I'm not sure if you will release (future tense) the RFP, or you released it this am (past tense)?
"It must be noted that VMI will release a Request for Proposals (RFP) this morning for DEI/IAT training and consulting."

From: Love, Jamica N
Sent: Tuesday, November 30, 2021 10:35 AM
To: Tomlin, Kathleen H <tomlinkh@vmi.edu>
Cc: Clark, Dallas B <clarkdb@vmi.edu>; Carmack, Lynn W <carmacklw@vmi.edu>; Lackey, Tracey M <lackeytm@vmi.edu>; Lawhorne, Jeffrey L <lawhornejl@vmi.edu>

Subject: RE: Time Sensitive: BiasSync Agreement Discussion

Morning,

Just to clarify the RFP is not for IAT, which is what Ms. Ruiz company does. The RFP is for onsite DEI training. I added that to the RFP so there is no confusion. Please see attached document with the highlighted yellow statement.

The other aspect of DEI training is to have ongoing touch points that will have IAT.

Thanks

From: Tomlin, Kathleen H <TomlinKH@vmi.edu>

Sent: Tuesday, November 30, 2021 7:51 AM

To: Michele Ruiz <michele@micheleruiz.com>; Matt Lorenc <matt.lorenc@biassync.com>; Love, Jamica N <lovejn@vmi.edu>

Cc: Clark, Dallas B <clarkdb@vmi.edu>; Carmack, Lynn W <carmacklw@vmi.edu>; Lackey, Tracey M <lackeytm@vmi.edu>; Lawhorne, Jeffrey L <LawhorneJL@vmi.edu>

Subject: RE: Time Sensitive: BiasSync Agreement Discussion

Good morning, Ms. Ruiz. My apologies for the delayed response; I was on leave last week and returned to the office yesterday. I am just now catching up on my correspondence.

If you feel it would be beneficial to have a phone call to provide any new information that would be helpful, I am more than obliged to accommodate. I am available the following dates and times; let me know which may be suitable for you.

6 December 2021	8:30 AM EST until 10:00 AM EST
7 December 2021	11:00 AM EST until 3:00 PM EST
8 December 2021	8:30 AM EST until 3:00 PM EST

It must be noted that VMI will release a Request for Proposals (RFP) this morning for DEI/IAT training and consulting. We will not be able to discuss that RFP or details surrounding this solicitation unless your company has no intention of submitting a responding proposal. Our conversation will be limited to the mechanics of the procurement processes in the Commonwealth of Virginia and the governing code sections regarding Small, Woman, and/or Minority (SWaM) owned businesses including reciprocity. Because LTC Love is the chair of the selection and evaluation committee for this solicitation, further communication with her is not permitted.

Thank you for your interests in the projects of the Institute. I look forward to your reply.

Kind regards,

Kathleen H. Tomlin

Colonel
VCO, VCCO, CUPO
Director, Procurement Services

Virginia Military Institute

314 Smith Hall, Lexington, Virginia 24450-0304
540-464-7166 Office
tomlinkh@vmi.edu | vmi.edu/procurement



New Platform Count-down! eVA is changing!

Remain in the know by visiting the eVA Transition Newsroom:
[Next Gen eVA](#)

From: Michele Ruiz <michele@micheleruiz.com>
Sent: Monday, November 22, 2021 3:19 PM
To: Tomlin, Kathleen H <TomlinKH@vmi.edu>; Matt Lorenc <matt.lorenc@biassync.com>; Love, Jamica N <lovejn@vmi.edu>
Cc: Clark, Dallas B <clarkdb@vmi.edu>; Carmack, Lynn W <carmacklw@vmi.edu>; Lackey, Tracey M <lackeytm@vmi.edu>
Subject: RE: Time Sensitive: BiasSync Agreement Discussion

Hello Ms. Tomlin,

As a follow on to my email from last Thursday, attached is the fully executed contract with Department of Commerce. We're currently in discussions regarding an expansion, meaning rolling out to more Dept of Commerce employees than currently licensed for.

Does a phone call to clarify any open items make sense?

Many thanks,

Michele Ruiz
CEO
Public Speaker
Bestselling Author

t. [310.853.3605](tel:310.853.3605)

From: Michele Ruiz

Sent: Thursday, November 18, 2021 4:26 PM

To: Tomlin, Kathleen H <TomlinKH@vmi.edu>; Matt Lorenc <matt.lorenc@biassync.com>; Love, Jamica N <lovejn@vmi.edu>

Cc: Clark, Dallas B <clarkdb@vmi.edu>; Carmack, Lynn W <carmacklw@vmi.edu>; Lackey, Tracey M <lackeytm@vmi.edu>

Subject: RE: Time Sensitive: BiasSync Agreement Discussion

Hello Ms. Tomlin,

Thank you for your communication below. I'm adding information that we believe is relevant to this ongoing communication. Please see below. Can we get on a phone call to discuss?

Thank you for your time and consideration.

Michele Ruiz

CEO

Public Speaker

Bestselling Author

t. [310.853.3605](tel:310.853.3605)

From: Tomlin, Kathleen H <TomlinKH@vmi.edu>

Sent: Thursday, November 18, 2021 4:36 AM

To: Matt Lorenc <matt.lorenc@biassync.com>; Love, Jamica N <lovejn@vmi.edu>

Cc: Michele Ruiz <michele@micheleruiz.com>; Clark, Dallas B <clarkdb@vmi.edu>; Carmack, Lynn W <carmacklw@vmi.edu>; Lackey, Tracey M <lackeytm@vmi.edu>

Subject: RE: Time Sensitive: BiasSync Agreement Discussion

Good morning, Mr. Lorenc.

Thank you for the opportunity to address your concerns. My apologies for the delayed response; I have been attending the Commonwealth's Summit the last three days.

Contracts: VMI has not seen evidence of a publicly open solicited contract awarded to Biassync. What we received were boiler plate terms and conditions but not actual contract documents.

Please feel free to provide additional supporting documentation. – *We can and will provide a copy of the contract with the Department of Commerce.*

As an agency of the Commonwealth (and in compliance with VMI's policies), all procurements under \$100k are set aside for SWaM certified vendors (Governor's Executive Order #35). Biassync, while eVA registered recently in August of this year, cannot qualify for Virginia SWaM certification because there is no reciprocity between California and Virginia [Virginia Administrative Code 7VAC13-20-80](#). See also *Code of Virginia § 2.2-1606*. – *The contract we've been discussing with Dr. Love is three*

years (as that is how long it takes to see behavior change based on our scientifically validated approach) and the total with a discount for the lowest amount of users(1700) we were asked to price out for comes to \$173,320.

Further, there is no basis for a Sole Source procurement because we have not publicly solicited to determine whether there is or is not any other available sources that can provide the services Dr. Love desires. Additionally, a quick search of the state's database and discussions with sister institutions of higher education would indicate that there are other firms available to provide IAT. A public solicitation would then separate those who can meet our needs more adequately and those who cannot by a knowledgeable panel evaluation. – I have attached our sole source justification which factors in that our bias assessments are not the same as the IAT provided by educational institutions as we measure for bias (i.e. Stereotypes) that are prevalent in workplaces and we provide organizational level data that no other provider has as this is our IP including our SyncScore™, and proprietary equity barrier diagnostic tools.

Thank you for your interest in Virginia Military Institute.

Kind regards,

Kathleen H. Tomlin

Colonel

VCO, VCCO, CUPO

Director, Procurement Services

Virginia Military Institute

314 Smith Hall, Lexington, Virginia 24450-0304

540-464-7166 Office

tomlinkh@vmi.edu | vmi.edu/procurement



New Platform Count-down! eVA is changing!

Remain in the know by visiting the eVA Transition Newsroom:

[Next Gen eVA](#)

From: Matt Lorenc <matt.lorenc@biassync.com>

Sent: Wednesday, November 17, 2021 7:00 PM

To: Love, Jamica N <lovejn@vmi.edu>

Cc: Michele Ruiz <michele@micheleruiz.com>; Tomlin, Kathleen H <TomlinKH@vmi.edu>; Clark, Dallas B <clarkdb@vmi.edu>

Subject: Re: Time Sensitive: BiasSync Agreement Discussion

Kathleen:

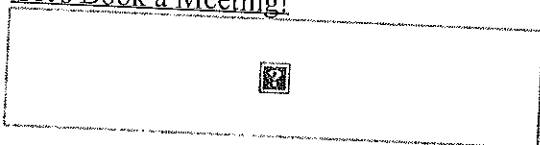
I hope this email finds you well. I just left you a voicemail in regards to the items Dr. Love had mentioned in the previous email and we'd like to find a convenient time to talk about the items in more detail and to just align on next steps regarding the BiasSync unconscious bias platform and training solution.

Can you please let me know when works best for you, and if you want please feel free to use this link to my calendar to find a date/time that works for you: <https://calendly.com/biassyncdemo/30-min?month=2021-11>

I look forward to hearing from you and hope you have a great rest of your day.

Regards,

Matt Lorenc
Director of Sales Operations
Mobile: 310-954-6415
[Let's Book a Meeting!](#)



On Tue, Nov 16, 2021 at 4:34 PM Matt Lorenc <matt.lorenc@biassync.com> wrote:

Hi Dr. Love:

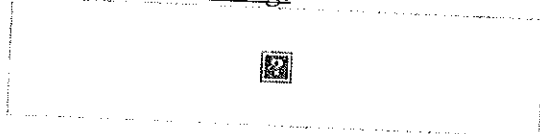
Thanks for the follow up and we hope you are feeling better.

@Kathleen - Can you please let me know when works best to hop on a quick call to align with the items that we've been discussing with Dr. Love? BiasSync/Ruiz Strategies currently has Federal Contracts out with Department of Commerce and Office of Inspector General and we were also told by the Governor's Office that the Commonwealth of Virgian can work with outside vendors, so we'd just like to get some clarification around this and also discuss our current Federal Contracts with you.

Please let me know when works best and I will send over a calendar invite with a Zoom link. Thanks

Regards,

Matt Lorenc
Director of Sales Operations
Mobile: 310-954-6415
[Let's Book a Meeting!](#)



On Mon, Nov 15, 2021 at 9:49 PM Love, Jamica N <lovejn@vmi.edu> wrote:

Greetings,

I'm out sick so I didn't get your voicemail and I'm just now feeling up to replying to emails.

LTC Kathleen Tomlin is our Director of Procurement and is the best person to speak with because she is the person who is responsible for assuring that we are able to do business with various companies and she is well versed in the procurement policies for the Commonwealth of Virginia. Please feel free to contact LTC Tomlin and she can explain the situation. Additionally, I have included our Deputy Superintendent of Finance and Administration, I sent him the terms and agreement you emailed me.

I am happy to consider working with your organization if I have misunderstood something from the procurement perspective.

Best,

Dr. Love

LTC Jamica Nadina Love, D.Ed.

Chief Diversity Officer

Virginia Military Institute

330 VMI Parade

Lexington, VA 24450

(540) 464-7789

From: Michele Ruiz <michele@micheleruiz.com>

Sent: Monday, November 15, 2021 2:08 PM

To: Matt Lorenc

Cc: Love, Jamica N

Subject: Re: Time Sensitive: BiasSync Agreement Discussion

Thanks Matt.

And I would add, the terms and conditions we provided Dr. Love came from the Dept of Commerce contract....

We know time is of the essence. Happy to get on a call with you to go over and get this over the finish line.

Michele Ruiz

CEO

Public Speaker

Bestselling Author

t. 310.853.3605

On Nov 15, 2021, at 10:26 AM, Matt Lorenc <matt.lorenc@biassync.com> wrote:

Hi Dr. Love:

Michele and I just left you a voicemail regarding your Friday email.

We would like to connect with you regarding your statement about "not having a Federal contract" because in fact we do have a Federal Contract with the US Department of Commerce, and they are actually in the process of "renewing" their contract.

You had also mentioned the issue about BiasSync/Ruiz Strategies being "California Based" and we would also like to discuss this issue with you because when we first connected with your organization through Dr. Janice Underwood she explained that the Commonwealth of Virginia works with vendors/suppliers outside of the commonwealth all the time and Dr. Underwood explained that doing business with BiasSync/Ruiz Strategies would not be an issue, so we'd like to explore this with you as well.

Can you please let us know if you have time today for a brief call? If today

doesn't work, can you please let us know your availability for the rest of the week and we'll work to put a time on the calendar ASAP.

Thank you for your time and we look forward to speaking with you soon.

Regards,

Matt Lorenc
Director of Sales Operations

Mobile: 310-954-6415

[Let's Book a Meeting!](#)



Exhibit 40



Cedric Wins
21 January 2014

Mr. Villani:

I occasionally come on this page to read thoughts of parents and alumni to see if there are things I should be thinking about or addressing in order to make VMI the best it can be for the Corps. I have never commented here. Since you chose to use my name and you misrepresented facts about the Institute and my administration, I think it warrants a response.

You chose to go on a local Richmond radio show and say that CRT has entered into the VMI realm. That is categorically false. You were asked whether VMI has been weakened and you respond that VMI leadership had appeased and not defended the institute. You failed to fully answer but acknowledged acts of racism and sexism likely happened and needed to be addressed. Your one credential that allows you to think you speak authoritatively about the Institute is that you were a (not THE) Honor Court president back in 1976. You attacked the former governor about a letter he signed that prejudged VMI and conflated it with the actions of the Board of Visitors and leadership of the Institute. Through your remarks, you've implied that no one among the BOV or Institute leadership disagreed in the manner in which we were treated. You stated that very little was said or done to defend the Institute.

However, contrary to your views and misstatements of facts, every interview, speech, op-ed and writing I and others have done to defend VMI and define the things necessary to preserve what is foundational about it to produce young leaders, is well documented and readily available. The very words you use in your interview; the notable alumni, the number of flag and general officers, the Rhode Scholars, the number who have died in combat, those that have fought for Civil Rights and most importantly the character and quality of young men and women here TODAY are the exact references I have made as Superintendent over and over again. The words you laud that were read to describe the VMI Corps during the governor's inaugural parade, are in fact the words provided by my staff to be spoken to that audience. The VMI Alumni Agencies produced a document titled the "Report on the Status and Future of the Institute" which empirically shows where VMI stands in some measurable categories defining it as a top college in the state. Each and every one of those actions were IN DEFENSE OF VMI.

You advised the listeners to urge the members of the General Assembly to "look very seriously" at VMI's funding request, a request you have no understanding about. VMI's funding request will pale in comparison to that of the other public colleges in the state. You have no understanding of DEI or what it means, or how much of the funding for DEI is represented in our request. The fact ALL of the 15 public institutions already have established some form of chief diversity office to support an initiative that is consistent with efforts by federal and state governments, DoD, some corporate boards as well as corporate entities to include your former employer. You've attempted to shine a bright (albeit negative) light on our request, one that a knowledgeable person would know not to do, so that our efforts, like other colleges, are not undercut or undermined and can compete for limited higher education resources.

You also railed about a letter you sent me on your views of our Honor System. The fact is, I did receive your letter on the Honor Code and System. I read it, twice in fact. Nothing in it was enlightening. I found the views of that group reflected the views of a number of alumni, board members and cadets I spoke to. I also looked at a number of recent cases & survey data, and thus determined a review was necessary. That is my responsibility as the deciding official at VMI. With your vast, singular expertise as a former HC president, surely you know this is not the first time a review was done over the 105+ year existence of the Honor Court. The committee that I directed to review the system consisted of a signatory to your letter as well as an alumnus who has spent his entire career as a lawyer, along with members of the Honor Court, our faculty and my HC representatives, people who are CURRENT with the matters of honor within the Corps. Since you were unable to, I can assure you, the Corps was looked upon with awe and pride by everyone I've spoken with since being there, on the ground, during the inaugural. Your frustration could be minimized by taking me up on the same invitation that I extend to all alumni: Come back and see for yourself what goes on at VMI today. Come see how the Corps responded to the one request I asked of them shortly after being named interim superintendent, that is "To demonstrate proudly, to all, who you are as VMI Cadets!" We are moving forward, forward-focused, with the bedrock of Institute fundamentals defended and even brighter days ahead, with all that is essential intact and the continuing to produce citizen-soldiers.

Exhibit 41

Mr. Villani Response to Maj. Gen Wins Facebook Post

Before I begin, I wish to express my sincere thanks to Nathan Michael Moore for taking the time to determine the reason for why I was unable to post my response earlier this week. I believe that issue has been resolved. I would also like to state that I reached out to MG Wins via email to verify that the response was from him given the speculation that it may not have been. Through coordination with Colonel Wyatt, I had a conversation with MG Wins. I thanked him for availing his time to speak with me. I believe it was a respectful conversation in which he confirmed that it was his response and we were also able to find some common ground.

As a sidebar to these posts, MG Wins' response found its way to Mr. Shapira at the Washington Post. It should also be noted that he got my personal cell phone number from some "other person." I declined to be interviewed by him. I would caution others to give pause when posting comments because they may find their way to the Washington Post.

I have listened to a number of fellow alumni as to how to respond, prayed, and have rewritten my response several times. This morning, I received a text from a fellow alumnus sharing the poem, I Flew, by Brad Baker. It caused me to rewrite my response once again. As a pilot who was so blessed to have had a 31 year career in aviation, I could really relate to the poem. There is also another experience in my life that I was blessed to have had and life-altering, my time at VMI. The poem is below as well as a modified version as it applies to my experience at the Institute. So let me briefly say that MG Wins and I see things differently with regard to the actions taken by the VMI Leadership and the issue of CRT; it wasn't just the HC President but initially 39 former Presidents that was expanded to over 100 former HC members, some of which are quite knowledgeable with the current honor system; it just wasn't one letter, it was many more that weren't acknowledged, 10 of which were resent after our conversation; from the 2022-2024 Biennial Budget and Amendments to the 2021 Appropriations Act submitted by the former governor - Provides funding to implement recommended actions from VMI's One Corp, One VMI Plan to address issues identified in the VMI Equity Audit calling for approximately \$6.1 million/25 staff positions which I was referring to in my on air interview with John Reid.

In closing, we will have our differences and vigorous debate/constructive criticism is healthy. Name calling is destructive and serves no useful purpose. Changes to preserve/enhance the VMI Experience should be strived for. I believe the best way for that to occur is if we place our focus on our common bond, not our differences; equality/ability not equity; inclusiveness based upon content of character.

Respectfully,

Carmen Villani '76

"I Flew" by Brad Baker:

"I won't remember the 0300 alerts, but only that I flew!

"I will not remember the crew rest in tents, nor recall how cold Arctic winds blew.

"I'll try not to remember the times I got sick. But only that I flew!

"I will never forget when nature became angry, to challenge my intrepid crew.

"I'll always remember the fear I felt. And the pride in knowing I flew.

"I'll remember the sights my mortal eyes saw, all colored in multiple hues.

"Those beautiful lights on cold winter nights, seen only by those who flew.

"God was extremely good to me. He let me touch his face.

"He saw my crew through war and peace, and blessed us with His grace.

"So when I stand on St. Peter's Gate, and tell him that I'm new, I'll know he'll smile and welcome me. Because he knows I flew!"

Source: Niemann Memorial Tribute ends with blast | News, Sports, Jobs - The Journal (nujournal.com)

I won't remember all of the trials of the Ratline, but only that I went to VMI.

I will not remember all the late night study sessions, nor the cold "dark ages."

I'll try not to remember all the times that I wanted to quit. But only that I went to VMI.

I will never forget when the cadre started yelling, to challenge me and my BR's.

I'll always remember the fear I felt. And the pride in knowing that I went to VMI.

I'll remember the experiences we endured, all in unison to serve a purpose.

Those moments of victory, seen only by those who went to VMI.

"God was extremely good to me. He let me touch his face."

He saw me and my BR's through the good and bad, and blessed us with His grace.

"So when I stand on St. Peter's Gate, and tell him that I'm new, I'll know he'll smile and welcome me." Because he knows that I went to VMI.

Sent from my iPhone

Exhibit 42

From: Sen, Tinni
To: Tomlin, Kathleen H; Love, Jamica N; Kline, Keith A; Sheikh, Ammad
Cc: Carmack, Lynn W; Clark, Dallas B
Subject: RE: DEI RFP Notes
Date: Wednesday, March 9, 2022 1:22:09 PM

Good Morning,
Unfortunately, since we were not required to save the notes, I did not save the ones from the first round of evaluations.
Also, there was no scoresheet for the in-person interviews, so I do not have formal notes for those.

Tinni

Tinni Sen, PhD (She/Her/Hers)
Alexander P. Morrison 1939 Professor of Economics and Business
Co-Advisor, VMI Promaji Club
Department of Economics and Business
Virginia Military Institute
Lexington, VA 24450
Office: 540.464.7478, cell: 540.817.8866
sensb@vmi.edu
tinnis.sen@gmail.com
Fall 21 Office hours: M 9-11, TTH 1-2pm and by appointment. [Make an appointment here](#)
I live and work on the ancestral lands of the Monacan peoples.

From: Tomlin, Kathleen H <TomlinKH@vmi.edu>
Sent: Wednesday, March 09, 2022 8:06 AM
To: Love, Jamica N <lovejn@vmi.edu>; Sen, Tinni <SenSB@vmi.edu>; Kline, Keith A <klineka@vmi.edu>; Sheikh, Ammad <sheikhas@vmi.edu>
Cc: Carmack, Lynn W <carmacklw@vmi.edu>; Clark, Dallas B <clarkdb@vmi.edu>
Subject: DEI RFP Notes

Good morning. We have a possible protest of the DEI Training contract award. The Notice of Intent to Award was published on 28 February 2022 and since that time, we have provided copies of procurement records as required. Unfortunately, we have not completely satisfied the request and must now provide the individual committee members' scoresheets and associated notes. We provided the scoring matrix (less committee member names) so we have your individual scoresheets. You will need to scan any original notes you took during your proposal evaluations (all firms) and those taken during the interview/presentation process of the three shortlisted firms. Please send these as soon as possible. The clock on the fresh 10 day review period will not start until we have provided these documents so time is of the essence.

Please scan your documents to carmacklw@vmi.edu

Thank you for support and assistance.
Kathy

Kathleen H. Tomlin

Colonel
VCO, VCCO, CUPO
Director, Procurement Services

Virginia Military Institute
314 Smith Hall, Lexington, Virginia 24450-0304
540-464-7166 Office
tomlinkh@vmi.edu | vmi.edu/procurement



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Exhibit 43

From: Love, Jamica N
To: Tomlin, Kathleen H
Cc: Clark, Dallas B; Carmack, Lynn W
Subject: RE: DEI Consultation and Training RFP V211-22-054
Date: Friday, January 14, 2022 2:17:37 PM
Attachments: [Image004.png](#)

Thanks .

Can you please define senior leadership?

From: Tomlin, Kathleen H <TomlinKH@vmi.edu>
Sent: Friday, January 14, 2022 1:28 PM
To: Love, Jamica N <lovejn@vmi.edu>
Cc: Clark, Dallas B <clarkdb@vmi.edu>; Carmack, Lynn W <carmacklw@vmi.edu>
Subject: RE: DEI Consultation and Training RFP V211-22-054

LTC Love,

I will respond to your questions on MAJ Carmack's behalf.

We are required to shortlist the number of firms where there is a clear delineation in panel scores. If so desired, you could shorten it to 3, but no less than 3 is recommended. Because of the number of firms that submitted, it is in our best interests to allow an adequate number to present. Additionally, you are not aware of the pricing, and won't be until after the interviews. Price will then become a factor in the selection. You may be omitting a firm that more easily fits within your budget.

The panel, by consensus, selects the firm to be recommended to senior leadership for approval.

It is our recommendation that firms be allowed enough time to adequately prepare their presentations to specifically address VMI needs rather than with a broader, generic view. We have received criticism for the short posting period allowed for this public solicitation. This procurement is highly visible and giving firms the ability to tailor their presentations will allow for a much more successful, less suspect, outcome. Unless directed otherwise by BG Clark, we will schedule with that in mind. Let MAJ Carmack know the desired number of firms – 3 or 5.

Kathleen H. Tomlin

Colonel
VCO, VCCO, CUPO
Director, Procurement Services

Virginia Military Institute

314 Smith Hall, Lexington, Virginia 24450-0304
540-464-7166 Office
tomlinkh@vmi.edu | vmi.edu/procurement



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From: Love, Jamica N <lovejn@vmi.edu>
Sent: Friday, January 14, 2022 1:02 PM
To: Carmack, Lynn W <carmacklw@vmi.edu>
Cc: Tomlin, Kathleen H <TomlinKH@vmi.edu>; Clark, Dallas B <clarkdb@vmi.edu>
Subject: RE: DEI Consultation and Training RFP V211-22-054

Major Carmack,

Thanks for the information. I have a couple of questions;
Is there a requirements to schedule 5?
Who makes the final decision on what company is used?

I'd like to schedule interviews before February.

Thanks,
JNL

From: Carmack, Lynn W <carmacklw@vmi.edu>
Sent: Friday, January 14, 2022 11:52 AM
To: Love, Jamica N <lovejn@vmi.edu>
Cc: Tomlin, Kathleen H <TomlinKH@vmi.edu>; Clark, Dallas B <clarkdb@vmi.edu>
Subject: DEI Consultation and Training RFP V211-22-054

LTC Love,

The scoring summary for this RFP is shown below. Using 70 as the defining score line, we will be scheduling 5 firms to conduct in person or virtual presentations and to allow questions from the evaluation committee. Since the firms will need time to prepare their presentations and to arrange their travel (if in person), we would probably need to schedule these presentations February 16-17 or the following week. We also have to consider the teaching schedules of the panel members since they may have less flexibility. Please review and let me know which week will be better and I'll check with the other panel members.

DEI Consultation and Training, RFP V211-22-054

FIRM:	LOVE	LACKEY	SHEIKH	SENN	KLIN	AVG	SWAM	LOCATION
NewPoint Strategies	82	100	78	81	90	86	S	VA
Veritas Academy	82	90	82	81	79	83	S	VA
CK Business Strategy	84	58	83	84	87	79	S	VA
FIG Strategy	78	58	74	78	81	74	S	NV
TMI Consulting	64	86	65	64	70	70	S	VA
CIDIS	64	85	64	64	66	69	S	VA
CTW LLC	71	62	67	70	71	68	S	VA
Center for Applied Innovation	65	85	64	64	57	67	S	VA
Racial Equity Group	63	71	61	63	68	65		TX
WGU Labs	50	63	49	48	62	55		UT
iPondr	44	45	47	43	45	44		MN
Mayadan Consulting Assoc.	44	39	44	44	42	42		VA

Respectfully,

Lynn W. Carmack, CUPO, VCCO, CPSM, CPSD, CPPO
Major, Virginia Militia
Assistant Director, Procurement Services

Virginia Military Institute
314 Smith Hall, Lexington, VA 24450
540-464-7223 Office





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Exhibit 44

VIRGINIA MILITARY INSTITUTE
Lexington, Virginia 24450

Procurement Services
Phone 540-464-7323
Fax 540-464-7669

M E M O R A N D U M

DATE: 16 December 2021

TO: Selection Committee
RFP # V211-22-054, Diversity, Equity, and
Inclusion (DEI) Consultation and Training

FROM: MAJ Lynn W. Carmack

SUBJECT: Interview/Proposal Evaluation Instructions

Reading and evaluating Offerors' written proposals is the first step in choosing the proposal that best meets the needs of the Institute. You are tasked with reading each proposal thoroughly, participating in the scheduled interviews, and scoring each firm, without discussion with other persons including members of the evaluation committee until the time of the scheduled interviews. This part of the procurement process is **strictly confidential**; therefore, it is imperative that no information be discussed outside the committee until the contract is awarded.

Proposals often contain proprietary information, so it is imperative that you keep them in a secure area.

You are required to submit the Non-Disclosure Statement below before copies of the proposals can be provided to you.

As a committee member, you are to review and score each Offeror's response based on the established evaluation criteria and rating scale. **Print out a score sheet for each of the vendors** who submitted a proposal and be sure to write notes or comments you may have for each Offeror. This will be important when discussing the rankings in order to make an award. Your notes are also helpful to use during the interview process in order to address your questions and/or concerns with the Offeror for clarification.

Your input is vital to awarding an advantageous and successful contract and your time and effort in completing this phase of the evaluation process is greatly appreciated.

Should questions arise during your evaluation, please contact me at 464-7223 or via e-mail at carmacklw@vmi.edu. Your score sheets are to be submitted by COB 10 January 2022. Please send them to Procurement Services either by Post Mail or to me electronically at the email address above.

Thank you for your participation in this process.

NON-DISCLOSURE STATEMENT

The procurement of goods and services by a public body from a private enterprise is a sensitive process governed by law. We must be assured that all public parties involved in the selection process do nothing to contribute to the "fact" or "appearance" of any impropriety or personal interest in the outcome of the procurement. Commonwealth law and policy requires that each individual be totally objective in arriving at their conclusions in the evaluation process. To better make you aware of the sensitivity of public procurements, each person serving on this evaluation/selection committee will be required to agree and comply with the following statements derived from *Ethics In Public Contracting, Code of Virginia*.

- A. I certify that I am not a paid officer or director of any firm which is expected to respond to this Request for Proposals (RFP). Similarly, no member of my immediate family is a paid officer or director of any firm which is expected to respond to this RFP.
- B. I certify that neither I, nor any member of my immediate family, do not directly owe money to any employee or officer of any firm which is expected to respond to this RFP.
- C. I certify that I do not have any funds invested in any firm which is expected to respond this RFP. Similarly, neither I nor any member of my immediate family own or control an interest in any firm which is expected to respond to this RFP.
- D. I certify that since my employment at Virginia Military Institute neither I nor any member of my immediate family, received lodging, entertainment, transportation, money or anything else of value offered by an employee or officer of any firm which is expected to respond to this RFP. (This includes tickets to sporting events or shows, meals or lodging, gifts, etc.). During and after the procurement process, I will not accept any of the forgoing from any employee or officer of any firm which is expected to respond or did responded to the RFP.

NOTE: Exceptions to D. must be approved by the Superintendent or designee initiating the procurement action. Such approval could include acceptance of a meal which is widely offered to many individuals inside and outside the Institute (i.e. provided on-site when a break in the proceedings is not practicable.)

- E. I certify that I have not received any compensation from any firm which is expected to respond to this RFP. No member of my immediate family has received compensation, salary or wages in excess of \$10,000 from any firm which is expected to respond to this RFP.

NOTE: If at any time during the evaluation/selection process, I find that I, or any member of my immediate family, have a personal interest in any firm responding to this RFP, I will promptly notify the chairperson of this conflict and voluntarily remove myself from this evaluation/selection process.

- F. During the course of this procurement, I understand that **all** communication with firms regarding this RFP must be handled by Procurement Services. I agree not to contact firms responding to this RFP, and if any of these firms attempt to contact me directly, I agree to refer the firm to Procurement Services and report such action. I also agree that the information acquired through this evaluation/selection process will not be divulged to anyone outside the panel until after award of the contract resulting from this process.
- G. I agree to abide by all the policies/procedures contained in this document relative to this procurement as well as any other instructions and directed by the Chairperson of this evaluation/selection committee.

Signature

Date

Printed Name

Exhibit 45

From: Sen, Tinni
To: Tomlin, Kathleen H; Love, Jamica N; Kline, Keith A; Sheikh, Ammad
Cc: Carmack, Lynn W; Clark, Dallas B
Subject: RE: DEI RFP Notes
Date: Wednesday, March 9, 2022 1:22:09 PM

Good Morning,
Unfortunately, since we were not required to save the notes, I did not save the ones from the first round of evaluations.
Also, there was no scoresheet for the in-person interviews, so I do not have formal notes for those.

Tinni

Tinni Sen, PhD (She/Her/Hers)
Alexander P. Morrison 1939 Professor of Economics and Business
Co-Advisor, VMI Promaji Club
Department of Economics and Business
Virginia Military Institute
Lexington, VA 24450
Office: 540.464.7478, cell: 540.817.8866
sensb@vmi.edu
tinnis.sen@gmail.com
Fall 21 Office hours: M 9-11, TTH 1-2pm and by appointment. [Make an appointment here](#)
I live and work on the ancestral lands of the Monacan peoples.

From: Tomlin, Kathleen H <TomlinKH@vmi.edu>
Sent: Wednesday, March 09, 2022 8:06 AM
To: Love, Jamica N <lovejn@vmi.edu>; Sen, Tinni <SenSB@vmi.edu>; Kline, Keith A <klineka@vmi.edu>; Sheikh, Ammad <sheikhas@vmi.edu>
Cc: Carmack, Lynn W <carmacklw@vmi.edu>; Clark, Dallas B <clarkdb@vmi.edu>
Subject: DEI RFP Notes

Good morning. We have a possible protest of the DEI Training contract award. The Notice of Intent to Award was published on 28 February 2022 and since that time, we have provided copies of procurement records as required. Unfortunately, we have not completely satisfied the request and must now provide the individual committee members' scoresheets and associated notes. We provided the scoring matrix (less committee member names) so we have your individual scoresheets. You will need to scan any original notes you took during your proposal evaluations (all firms) and those taken during the interview/presentation process of the three shortlisted firms. Please send these as soon as possible. The clock on the fresh 10 day review period will not start until we have provided these documents so time is of the essence.

Please scan your documents to carmacklw@vmi.edu

Thank you for support and assistance.
Kathy

Kathleen H. Tomlin

Colonel
VCO, VCCO, CUPO
Director, Procurement Services

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Evaluator: Sen

EVALUATION AND AWARD CRITERIA
RFP # V211-22-054
Diversity, Equity, and Inclusion (DEI) Consultation and Training

Offeror: NewPoint

Date: Jan 10, 2022

Evaluation Criteria	VALUE	SCORE
Plan for providing DEI services, tailored to VMI needs	20	15
Qualifications and experience of Offeror	20	14
<i>Price (Scored by Procurement Services)</i>	15	14.97
Implementation, Planning and Services	15	14
References where similar goods and/or services have been provided	10	3
<i>Participation of Small, Women-Owned and Minority (SWaM) Business (Scored by Procurement Services)</i>	20	20
TOTAL	100	80.97 46

Notes/Comments _____



Evaluator: Sen

EVALUATION AND AWARD CRITERIA
RFP # V211-22-054
Diversity, Equity, and Inclusion (DEI) Consultation and Training

Offeror: Veritas

Date: Jan 10, 2022

Evaluation Criteria	VALUE	SCORE
Plan for providing DEI services, tailored to VMI needs	20	15
Qualifications and experience of Offeror	20	14
<i>Price (Scored by Procurement Services)</i>	15	15
Implementation, Planning and Services	15	13
References where similar goods and/or services have been provided	10	4
<i>Participation of Small, Women-Owned and Minority (SWaM) Business (Scored by Procurement Services)</i>	20	20
TOTAL	100	81 40

Notes/Comments _____



Evaluator: Sen

EVALUATION AND AWARD CRITERIA
RFP # V211-22-054
Diversity, Equity, and Inclusion (DEI) Consultation and Training

Offeror: CK Business Strategy

Date: Jan 10, 2022

Evaluation Criteria	VALUE	SCORE
Plan for providing DEI services, tailored to VMI needs	20	20
Qualifications and experience of Offeror	20	19
<i>Price (Scored by Procurement Services)</i>	15	2.5
Implementation, Planning and Services	15	14
References where similar goods and/or services have been provided	10	8
<i>Participation of Small, Women-Owned and Minority (SWaM) Business (Scored by Procurement Services)</i>	20	20
TOTAL	100	83.5 <i>61</i>

Notes/Comments _____



Evaluator: Sen

EVALUATION AND AWARD CRITERIA
RFP # V211-22-054
Diversity, Equity, and Inclusion (DEI) Consultation and Training

Offeror: Center for Applied Innovation

Date: Jan 10, 2022

Evaluation Criteria	VALUE	SCORE
Plan for providing DEI services, tailored to VMI needs	20	13
Qualifications and experience of Offeror	20	14
<i>Price (Scored by Procurement Services)</i>	15	0
Implementation, Planning and Services	15	9
References where similar goods and/or services have been provided	10	8
<i>Participation of Small, Women-Owned and Minority (SWaM) Business (Scored by Procurement Services)</i>	20	20
TOTAL	100	64 44

Notes/Comments _____



Evaluator: Sen

EVALUATION AND AWARD CRITERIA
RFP # V211-22-054
Diversity, Equity, and Inclusion (DEI) Consultation and Training

Offeror: CIDIS

Date: Jan 10, 2022

Evaluation Criteria	VALUE	SCORE
Plan for providing DEI services, tailored to VMI needs	20	13
Qualifications and experience of Offeror	20	14
Price (Scored by Procurement Services)	15	.19
Implementation, Planning and Services	15	12
References where similar goods and/or services have been provided	10	5
Participation of Small, Women-Owned and Minority (SWaM) Business (Scored by Procurement Services)	20	20
TOTAL	100	64.19 44

Notes/Comments _____



Evaluator: Sen

EVALUATION AND AWARD CRITERIA
RFP # V211-22-054
Diversity, Equity, and Inclusion (DEI) Consultation and Training

Offeror: CTW LLC

Date: Jan 10, 2022

Evaluation Criteria	VALUE	SCORE
Plan for providing DEI services, tailored to VMI needs	20	15
Qualifications and experience of Offeror	20	15
Price (Scored by Procurement Services)	15	8.15
Implementation, Planning and Services	15	9
References where similar goods and/or services have been provided	10	8
Participation of Small, Women-Owned and Minority (SWaM) Business (Scored by Procurement Services)	20	20
TOTAL	100	70.15 47

Notes/Comments _____



Evaluator: Sen

EVALUATION AND AWARD CRITERIA
RFP # V211-22-054
Diversity, Equity, and Inclusion (DEI) Consultation and Training

Offeror: FIG

Date: Jan 10, 2022

Evaluation Criteria	VALUE	SCORE
Plan for providing DEI services, tailored to VMI needs	20	18
Qualifications and experience of Offeror	20	17
Price (Scored by Procurement Services)	15	3.04
Implementation, Planning and Services	15	12
References where similar goods and/or services have been provided	10	8
Participation of Small, Women-Owned and Minority (SWaM) Business (Scored by Procurement Services)	20	20
TOTAL	100	78.04 55

Notes/Comments _____



Evaluator: Sen

EVALUATION AND AWARD CRITERIA
RFP # V211-22-054
Diversity, Equity, and Inclusion (DEI) Consultation and Training

Offeror: Iponder

Date: Jan 10, 2022

Evaluation Criteria	VALUE	SCORE
Plan for providing DEI services, tailored to VMI needs	20	10
Qualifications and experience of Offeror	20	11
<i>Price (Scored by Procurement Services)</i>	15	4.5
Implementation, Planning and Services	15	10
References where similar goods and/or services have been provided	10	7
<i>Participation of Small, Women-Owned and Minority (SWaM) Business (Scored by Procurement Services)</i>	20	0
TOTAL	100	42.5 88

Notes/Comments _____



Evaluator: Sen

EVALUATION AND AWARD CRITERIA
RFP # V211-22-054
Diversity, Equity, and Inclusion (DEI) Consultation and Training

Offeror: Mayadan

Date: Jan 10, 2022

Evaluation Criteria	VALUE	SCORE
Plan for providing DEI services, tailored to VMI needs	20	10
Qualifications and experience of Offeror	20	13
<i>Price (Scored by Procurement Services)</i>	15	3.31
Implementation, Planning and Services	15	11
References where similar goods and/or services have been provided	10	6
<i>Participation of Small, Women-Owned and Minority (SWaM) Business (Scored by Procurement Services)</i>	20	.4
TOTAL	100	43.71 40

Notes/Comments _____



Evaluator: Sen

EVALUATION AND AWARD CRITERIA
RFP # V211-22-054
Diversity, Equity, and Inclusion (DEI) Consultation and Training

Offeror: Racial Equity Group

Date: Jan 10, 2022

Evaluation Criteria	VALUE	SCORE
Plan for providing DEI services, tailored to VMI needs	20	17
Qualifications and experience of Offeror	20	15
<i>Price (Scored by Procurement Services)</i>	15	11.04
Implementation, Planning and Services	15	13
References where similar goods and/or services have been provided	10	7
<i>Participation of Small, Women-Owned and Minority (SWaM) Business (Scored by Procurement Services)</i>	20	0
TOTAL	100	63.04 52

Notes/Comments _____



Evaluator: Sen

EVALUATION AND AWARD CRITERIA
RFP # V211-22-054
Diversity, Equity, and Inclusion (DEI) Consultation and Training

Offeror: TMI

Date: Jan 10, 2022

Evaluation Criteria	VALUE	SCORE
Plan for providing DEI services, tailored to VMI needs	20	10
Qualifications and experience of Offeror	20	14
Price (Scored by Procurement Services)	15	16
Implementation, Planning and Services	15	12
References where similar goods and/or services have been provided	10	7
Participation of Small, Women-Owned and Minority (SWaM) Business (Scored by Procurement Services)	20	20
TOTAL	100	69.16 43

Notes/Comments _____



Evaluator: Sen

EVALUATION AND AWARD CRITERIA
RFP # V211-22-054
Diversity, Equity, and Inclusion (DEI) Consultation and Training

Offeror: WGU

Date: Jan 10, 2022

Evaluation Criteria	VALUE	SCORE
Plan for providing DEI services, tailored to VMI needs	20	10
Qualifications and experience of Offeror	20	13
<i>Price (Scored by Procurement Services)</i>	15	8.44
Implementation, Planning and Services	15	10
References where similar goods and/or services have been provided	10	7
<i>Participation of Small, Women-Owned and Minority (SWaM) Business (Scored by Procurement Services)</i>	20	0
TOTAL	100	48.44

40

Notes/Comments _____

Exhibit 46

From: Tomlin, Kathleen H
To: Carmack, Lynn W
Subject: FW: DEI RFP Notes
Date: Wednesday, March 9, 2022 11:22:39 AM

From: Sheikh, Ammad <sheikhas@vmi.edu>
Sent: Wednesday, March 9, 2022 10:49 AM
To: Tomlin, Kathleen H <TomlinKH@vmi.edu>
Subject: RE: DEI RFP Notes

Hi Kathy,

I didn't take any notes in particular. Clearly, I would've had them if I knew that I would be needing them. All the best.

Ammad

From: Tomlin, Kathleen H <TomlinKH@vmi.edu>
Sent: Wednesday, March 9, 2022 8:06 AM
To: Love, Jamica N <lovejn@vmi.edu>; Sen, Tinni <SenSB@vmi.edu>; Kline, Keith A <klineka@vmi.edu>; Sheikh, Ammad <sheikhas@vmi.edu>
Cc: Carmack, Lynn W <carmacklw@vmi.edu>; Clark, Dallas B <clarkdb@vmi.edu>
Subject: DEI RFP Notes

Good morning. We have a possible protest of the DEI Training contract award. The Notice of Intent to Award was published on 28 February 2022 and since that time, we have provided copies of procurement records as required. Unfortunately, we have not completely satisfied the request and must now provide the individual committee members' scoresheets and associated notes. We provided the scoring matrix (less committee member names) so we have your individual scoresheets. You will need to scan any original notes you took during your proposal evaluations (all firms) and those taken during the interview/presentation process of the three shortlisted firms. Please send these as soon as possible. The clock on the fresh 10 day review period will not start until we have provided these documents so time is of the essence.

Please scan your documents to carmacklw@vmi.edu

Thank you for support and assistance.
Kathy

Kathleen H. Tomlin

Colonel
VCO, VCCO, CUPO
Director, Procurement Services

Virginia Military Institute

314 Smith Hall, Lexington, Virginia 24450-0304

540-464-7166 Office

tomlinkh@vmi.edu | vmi.edu/procurement



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Evaluator: LTC Ammad Sheikh

EVALUATION AND AWARD CRITERIA
RFP # **V211-22-054**
Diversity, Equity, and Inclusion (DEI) Consultation and Training

Offeror: Veritas Academy

Date: 1/4/22

Evaluation Criteria	VALUE	SCORE
Plan for providing DEI services, tailored to VMI needs	20	15
Qualifications and experience of Offeror	20	14
Price (Scored by Procurement Services)	15	15
Implementation, Planning and Services	15	12
References where similar goods and/or services have been provided	10	6
Participation of Small, Women-Owned and Minority (SWaM) Business (Scored by Procurement Services)	20	20
TOTAL	100	47

Notes/Comments _____

82



Evaluator: LTC Ammad Sheikh

EVALUATION AND AWARD CRITERIA

RFP # V211-22-054

Diversity, Equity, and Inclusion (DEI) Consultation and Training

Offeror: CK Business Strategies

Date: 1/6/22

Evaluation Criteria	VALUE	SCORE
Plan for providing DEI services, tailored to VMI needs	20	17
Qualifications and experience of Offeror	20	18
<i>Price (Scored by Procurement Services)</i>	15	2.5
Implementation, Planning and Services	15	15
References where similar goods and/or services have been provided	10	10
<i>Participation of Small, Women-Owned and Minority (SWaM) Business (Scored by Procurement Services)</i>	20	20
TOTAL	100	60

82.5

Notes/Comments



Evaluator: LTC Ammed Sheikh

EVALUATION AND AWARD CRITERIA

RFP # **V211-22-054**

Diversity, Equity, and Inclusion (DEI) Consultation and Training

Offeror: Center for Applied Innovation

Date: 1/4/22

Evaluation Criteria	VALUE	SCORE
Plan for providing DEI services, tailored to VMI needs	20	15
Qualifications and experience of Offeror	20	13
Price (Scored by Procurement Services)	15	0
Implementation, Planning and Services	15	10
References where similar goods and/or services have been provided	10	6
Participation of Small, Women-Owned and Minority (SWaM) Business (Scored by Procurement Services)	20	20
TOTAL	100	64

Notes/Comments



Evaluator: LTC Ammad Sheikh

EVALUATION AND AWARD CRITERIA

RFP # **V211-22-054**

Diversity, Equity, and Inclusion (DEI) Consultation and Training

Offeror: CIDIS

Date: 4/5/22

Evaluation Criteria	VALUE	SCORE
Plan for providing DEI services, tailored to VMI needs	20	15
Qualifications and experience of Offeror	20	13
<i>Price (Scored by Procurement Services)</i>	15	19
Implementation, Planning and Services	15	10
References where similar goods and/or services have been provided	10	6
<i>Participation of Small, Women-Owned and Minority (SWaM) Business (Scored by Procurement Services)</i>	20	20
TOTAL	100	64

64.19

Notes/Comments



Evaluator: LTC Ahmad Sheikh

EVALUATION AND AWARD CRITERIA
RFP # V211-22-054
Diversity, Equity, and Inclusion (DEI) Consultation and Training

Offeror: CTW LLC

Date: 1/4/22

Evaluation Criteria	VALUE	SCORE
Plan for providing DEI services, tailored to VMI needs	20	13
Qualifications and experience of Offeror	20	14
Price (Scored by Procurement Services)	15	8.15
Implementation, Planning and Services	15	12
References where similar goods and/or services have been provided	10	5
Participation of Small, Women-Owned and Minority (SWaM) Business (Scored by Procurement Services)	20	20
TOTAL	100	44

67.15

Notes/Comments



Evaluator: LTC Ammad Sheikh

EVALUATION AND AWARD CRITERIA

RFP # **V211-22-054**

Diversity, Equity, and Inclusion (DEI) Consultation and Training

Offeror: FIG

Date: 1/5/22

Evaluation Criteria	VALUE	SCORE
Plan for providing DEI services, tailored to VMI needs	20	15
Qualifications and experience of Offeror	20	15
Price (Scored by Procurement Services)	15	8.04
Implementation, Planning and Services	15	15
References where similar goods and/or services have been provided	10	6
Participation of Small, Women-Owned and Minority (SWaM) Business (Scored by Procurement Services)	20	20
TOTAL	100	51

Notes/Comments

74.04



Evaluator: LTC Ammad Sheikh

EVALUATION AND AWARD CRITERIA
RFP # **V211-22-054**
Diversity, Equity, and Inclusion (DEI) Consultation and Training

Offeror: iPondy

Date: 1/4/22

Evaluation Criteria	VALUE	SCORE
Plan for providing DEI services, tailored to VMI needs	20	12
Qualifications and experience of Offeror	20	13
Price (Scored by Procurement Services)	15	4.5
Implementation, Planning and Services	15	12
References where similar goods and/or services have been provided	10	5
Participation of Small, Women-Owned and Minority (SWaM) Business (Scored by Procurement Services)	20	0
TOTAL	100	42

46.5

Notes/Comments _____



Evaluator: LTC Ammad Sleikh

EVALUATION AND AWARD CRITERIA

RFP # **V211-22-054**

Diversity, Equity, and Inclusion (DEI) Consultation and Training

Offeror: Maxaden Consulting

Date: 1/3/22

Evaluation Criteria	VALUE	SCORE
Plan for providing DEI services, tailored to VMI needs	20	12
Qualifications and experience of Offeror	20	13
Price (Scored by Procurement Services)	15	3.31
Implementation, Planning and Services	15	9
References where similar goods and/or services have been provided	10	6
Participation of Small, Women-Owned and Minority (SWaM) Business (Scored by Procurement Services)	20	.4
TOTAL	100	40

43.71

Notes/Comments



Evaluator: LTC Ammad Sheikh

EVALUATION AND AWARD CRITERIA

RFP # V211-22-054

Diversity, Equity, and Inclusion (DEI) Consultation and Training

Offeror: Racial Equity Corp

Date: 1/5/22

Evaluation Criteria	VALUE	SCORE
Plan for providing DEI services, tailored to VMI needs	20	15
Qualifications and experience of Offeror	20	16
Price (Scored by Procurement Services)	15	11.04
Implementation, Planning and Services	15	13
References where similar goods and/or services have been provided	10	6
Participation of Small, Women-Owned and Minority (SWaM) Business (Scored by Procurement Services)	20	0
TOTAL	100	50

61.04

Notes/Comments



Evaluator: LTC Ammad Sheikh

EVALUATION AND AWARD CRITERIA

RFP # V211-22-054

Diversity, Equity, and Inclusion (DEI) Consultation and Training

Offeror: TMI

Date: 1/10/22

Evaluation Criteria	VALUE	SCORE
Plan for providing DEI services, tailored to VMI needs	20	12
Qualifications and experience of Offeror	20	13
<i>Price (Scored by Procurement Services)</i>	15	1.16
Implementation, Planning and Services	15	13
References where similar goods and/or services have been provided	10	6
<i>Participation of Small, Women-Owned and Minority (SWaM) Business (Scored by Procurement Services)</i>	20	20
TOTAL	100	44

65.16

Notes/Comments



Evaluator: LTC Ammerd Sheikh

EVALUATION AND AWARD CRITERIA
RFP # **V211-22-054**
Diversity, Equity, and Inclusion (DEI) Consultation and Training

Offeror: Wgulfabs

Date: 1/4/22

Evaluation Criteria	VALUE	SCORE
Plan for providing DEI services, tailored to VMI needs	20	13
Qualifications and experience of Offeror	20	12
Price (Scored by Procurement Services)	15	8.44
Implementation, Planning and Services	15	11
References where similar goods and/or services have been provided	10	5
Participation of Small, Women-Owned and Minority (SWaM) Business (Scored by Procurement Services)	20	0
TOTAL	100	41

Notes/Comments

49.44

Exhibit 47



Evaluator Jean Lee

EVALUATION AND AWARD CRITERIA
RFP # V211-22-054
Diversity, Equity, and Inclusion (DEI) Consultation and Training

Offeror: New Point Strategies

Date: 1/20/22

Evaluation Criteria	VALUE	SCORE
Plan for providing DEI services, tailored to VMI needs	20	15
Qualifications and experience of Offeror	20	15
Price (Scored by Procurement Services)	15	15
Implementation, Planning and Services	15	14.97
References where similar goods and/or services have been provided	10	13
Participation of Small, Women-Owned and Minority (SWaM) Business (Scored by Procurement Services)	20	4
TOTAL	100	81.97

47

Notes/Comments

- pg 7. liked that they had VMI-L leadership giving feedback to proposed trainings.
- Good experience with military and understanding of DEI as it relates to military.
- Experience with sexual assault as well.
- Good training is a plus, *research
- Consultant with direct mental health experience on college campuses

(47)



Evaluator: *[Signature]*

EVALUATION AND AWARD CRITERIA
RFP # V211-22-054
Diversity, Equity, and Inclusion (DEI) Consultation and Training

Offeror: *Winter Academy*

Date: *1/2/22*

Evaluation Criteria	VALUE	SCORE
Plan for providing DEI services, tailored to VMI needs	20	14
Qualifications and experience of Offeror	20	15
Price (Scored by Procurement Services)	15	15
Implementation, Planning and Services	15	13
References where similar goods and/or services have been provided	10	5
Participation of Small, Women-Owned and Minority (SWaM) Business (Scored by Procurement Services)	20	20
TOTAL	100	82

47

Notes/Comments

*Offeror plan type was concise. They could further assess by etc.
 Only provided references for facilitator. Would
 have been good to show more diversity in references
 Fort Bragg = good experience.
 Would really like to see cost breakdown to assess
 feasibility of plan and timeline.
 - Approach is very internally focused.*



Evaluator: Jack Jones

EVALUATION AND AWARD CRITERIA

RFP # V211-22-054

Diversity, Equity, and Inclusion (DEI) Consultation and Training

Offeror: CR Business Strategies
GC Global Insights

Date: 12/22/21

Evaluation Criteria	VALUE	SCORE
Plan for providing DEI services, tailored to VMI needs	20	19
Qualifications and experience of Offeror	20	19
Price (Scored by Procurement Services)	15	2.5
Implementation, Planning and Services	15	14
References where similar goods and/or services have been provided	10	9
Participation of Small, Women-Owned and Minority (SWaM) Business (Scored by Procurement Services)	20	20
TOTAL	100	83.5 <u>61</u>

Notes/Comments

None initial focus
Utilizes language from the profession of B7 audit
Has solid initial experience, personal & professional
Has train the trainer program
Several assault & diversity, equity & inclusion
experience (Richards)
Has a diversity of trainers
References include implementation, monitoring and
work with state agencies, i.e. police
(6)



Evaluator: [Signature]

EVALUATION AND AWARD CRITERIA

RFP # V211-22-054

Diversity, Equity, and Inclusion (DEI) Consultation and Training

Offeror: Center for Applied Mathematics

Date: 12/30/21

Evaluation Criteria	VALUE	SCORE
Plan for providing DEI services, tailored to VMI needs	20	14
Qualifications and experience of Offeror	20	13
Price (Scored by Procurement Services)	15	0
Implementation, Planning and Services	15	11
References where similar goods and/or services have been provided	10	7
Participation of Small, Women-Owned and Minority (SWaM) Business (Scored by Procurement Services)	20	20
TOTAL	100	65 45

Notes/Comments

Found the proposal hard to follow and the
information was superfluous.
Team contained solid staffing with a background in
military.



Evaluator:

[Handwritten signature]

EVALUATION AND AWARD CRITERIA

RFP # **V211-22-054**

Diversity, Equity, and Inclusion (DEI) Consultation and Training

Offeror:

C. D. S. LLC

Date:

1/2/22

Evaluation Criteria	VALUE	SCORE
Plan for providing DEI services, tailored to VMI needs	20	13
Qualifications and experience of Offeror	20	15
Price (Scored by Procurement Services)	15	19
Implementation, Planning and Services	15	11
References where similar goods and/or services have been provided	10	5
Participation of Small, Women-Owned and Minority (SWaM) Business (Scored by Procurement Services)	20	20
TOTAL	100	64.19

44

Notes/Comments

Would have liked more than two references. Time line for implementation is longer than listed on pg 51. Not sure about the direction the company wants to take in reference to working with leadership. Would have liked to see more than two references.

(44)



Evaluator: [Signature]

EVALUATION AND AWARD CRITERIA

RFP # **V211-22-054**

Diversity, Equity, and Inclusion (DEI) Consultation and Training

Offeror: [Signature]

Date: 12/2/21

Evaluation Criteria	VALUE	SCORE
Plan for providing DEI services, tailored to VMI needs	20	15
Qualifications and experience of Offeror	20	15
Price (Scored by Procurement Services)	15	3.15
Implementation, Planning and Services	15	11
References where similar goods and/or services have been provided	10	7
Participation of Small, Women-Owned and Minority (SWaM) Business (Scored by Procurement Services)	20	20
TOTAL	100	71.15

48

Notes/Comments

Don't think the companies approach is ideal for us.

- Would like more focus on military atmosphere
- Would also like to see more specifics of consultant experience.

(48)



Evaluator: *[Signature]*

EVALUATION AND AWARD CRITERIA

RFP # **V211-22-054**

Diversity, Equity, and Inclusion (DEI) Consultation and Training

Offeror: *[Signature]*

Date: 1/2/22

Evaluation Criteria	VALUE	SCORE
Plan for providing DEI services, tailored to VMI needs	20	18
Qualifications and experience of Offeror	20	18
Price (Scored by Procurement Services)	15	3.04
Implementation, Planning and Services	15	13
References where similar goods and/or services have been provided	10	7
Participation of Small, Women-Owned and Minority (SWaM) Business (Scored by Procurement Services)	20	20
TOTAL	100	78.04

55

Notes/Comments

- Well presented proposal.
- Understanding of how military approach can encourage unity while discouraging differences.
- Concern about the 2 training videos ... need online training!

(55)



Evaluator: *[Signature]*

EVALUATION AND AWARD CRITERIA
RFP # V211-22-054
Diversity, Equity, and Inclusion (DEI) Consultation and Training

Offeror: *i Ponder*

Date: *12/23/21*

Evaluation Criteria	VALUE	SCORE
Plan for providing DEI services, tailored to VMI needs	20	11
Qualifications and experience of Offeror	20	11
Price (Scored by Procurement Services)	15	4.5
Implementation, Planning and Services	15	11
References where similar goods and/or services have been provided	10	6
Participation of Small, Women-Owned and Minority (SWaM) Business (Scored by Procurement Services)	20	0
TOTAL	100	43.5 <i>39</i>

Notes/Comments

- They are a digital learning platform, not really what is primarily needed.
- Their core training learning is delivered via web based device. Is it what we asked for? pg 13
- Empathy approach... would rather a bias approach.
- Would like to see more direct understanding of military.
- Seems like they see themselves as adjunct / support to C&O instead of core trainer
- References mostly online blage pg 5.



Evaluator: *[Signature]*

EVALUATION AND AWARD CRITERIA

RFP # V211-22-054

Diversity, Equity, and Inclusion (DEI) Consultation and Training

Offeror: *Magalom Consulting Assoc.*

Date: *1/2/21*

Evaluation Criteria	VALUE	SCORE
	Plan for providing DEI services, tailored to VMI needs	20
Qualifications and experience of Offeror	20	<i>11</i>
Price (Scored by Procurement Services)	15	<i>14</i>
Implementation, Planning and Services	15	<i>3.31</i>
References where similar goods and/or services have been provided	10	<i>10</i>
Participation of Small, Women-Owned and Minority (SWaM) Business (Scored by Procurement Services)	20	<i>5</i>
TOTAL	100	<i>43.71</i>

40

Notes/Comments

- Approach seemed to be the most general, it ~~was~~ was challenging to assess how they would work with us.
- Bad copy of a resume... challenging to assess qualifications. Didn't understand the self-assessment part.
- ~~By~~ the timeline is a huge concern.
- ~~1/2/21~~ - Magalom needs to do an assessment to learn who the key players are ???



Evaluator: [Signature]

EVALUATION AND AWARD CRITERIA
RFP # **V211-22-054**
Diversity, Equity, and Inclusion (DEI) Consultation and Training

Offeror: Racial Equity Group

Date: 1/2/22

Evaluation Criteria	VALUE	SCORE
Plan for providing DEI services, tailored to VMI needs	20	
Qualifications and experience of Offeror	20	17
Price (Scored by Procurement Services)	15	15
Implementation, Planning and Services	15	11.04
References where similar goods and/or services have been provided	10	13
Participation of Small, Women-Owned and Minority (SWaM) Business (Scored by Procurement Services)	20	7
TOTAL	100	63.04

52

Notes/Comments

- Has experience working with inclusive excellence plan.
- Would like to know how they would balance race with other aspects of diversity (beyond race).

(32)



Evaluator: *[Signature]*

EVALUATION AND AWARD CRITERIA

RFP # V211-22-054

Diversity, Equity, and Inclusion (DEI) Consultation and Training

Offeror: *T. Mel. Consulting*

Date: *1/2/22*

Evaluation Criteria	VALUE	SCORE
Plan for providing DEI services, tailored to VMI needs	20	10
Qualifications and experience of Offeror	20	15
Price (Scored by Procurement Services)	15	1.16
Implementation, Planning and Services	15	12
References where similar goods and/or services have been provided	10	6
Participation of Small, Women-Owned and Minority (SWaM) Business (Scored by Procurement Services)	20	20
TOTAL	100	61.16 43

Notes/Comments

- Doesn't seem to display an understanding of our unique military environment.
 Don't like the fractional CEO concept! As that role is defined in the proposal as a biz exec team member. That role is already filled!
 Didn't mention here they could tailor courses to a military college.
 No timeline included.

(43)



Evaluator: [Signature]

EVALUATION AND AWARD CRITERIA

RFP # V211-22-054

Diversity, Equity, and Inclusion (DEI) Consultation and Training

Offeror: Wge Jobs

Date: 12/22/21

Evaluation Criteria	VALUE	SCORE
Plan for providing DEI services, tailored to VMI needs	20	12
Qualifications and experience of Offeror	20	14
Price (Scored by Procurement Services)	15	8.44
Implementation, Planning and Services	15	10
References where similar goods and/or services have been provided	10	6
Participation of Small, Women-Owned and Minority (SWaM) Business (Scored by Procurement Services)	20	0
TOTAL	100	50.44 42

Notes/Comments: Wge Jobs ~~is~~ not SWaM

- Only online college
 - Lengthy timelines (1yr)
 - Concerned about online concept... Requested face to face
 - Concerned about data collection times
 - Lack of description in reference to what has been done at other campuses
 - Why not just hire Cape?
 - Didn't talk about the ~~unique~~ unique culture of VMI
- (42)

Exhibit 48

Love

1. VMI seeks to intentionally strengthen its commitment and work around DEI to aid the institute in achieving its Inclusive Excellence Plan goals and objectives. Before July 2021 there was no DE&I Office, Inclusive Excellence strategic plan, face-to-face Inclusive Excellence activities for the Corps of Cadets, faculty, or staff. Does that information change your approach to your proposed work with VMI? If so, how? *Maybe need to look at the plan... could be reflective of what you already have. Assessment would give a baseline. Also could prioritize*

2. The RFP notes that the organization must be able to provide Inclusive Excellence training that includes guidelines, cultural sharing, areas of modification, bias intervention options, and DEI language that best fits the VMI community

Can you please describe similar experiences you have in delivering DE&I trainings? *More a more open. Respect in the workplace*

Can you please discuss how you would aid the DE&I office in rolling out such a training?

3. How will you protect VMI from risk?

As someone who was part of the 1st class of Naval Cadets.

2. Kilmartin worked with OMT when they left women in 1997

you have in individual who might connect with gen 2.

His wife appeared in Athletics.

assessment is about getting behaviour

Understand the importance of leadership with the

Inclusion Excellence plan --- success.

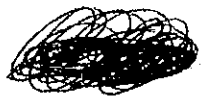
Will provide interactive training.

Yes can do this in April

Language positioning strategy to help mitigate risk.

Alvin Fuller Hubbard class of 1933

UMT



~~VMI~~ Academy

1. VMI seeks to intentionally strengthen its commitment and work around DEI to aid the institute in achieving its Inclusive Excellence Plan goals and objectives. Before July 2021 there was no DE&I Office, Inclusive Excellence strategic plan, face-to-face Inclusive Excellence activities for the Corps of Cadets, faculty, or staff. Does that information change your approach to your proposed work with VMI? If so, how? - No, honor centered
Want to hear the ugly too.

2. The RFP notes that the organization must be able to provide Inclusive Excellence training that includes guidelines, cultural sharing, areas of modification, bias intervention options, and DEI language that best fits the VMI community

Can you please describe similar experiences you have in delivering DE&I trainings? Foot brog / NGA / San Antonio Am Fael bar
The teach unconscious bias thing.

Can you please discuss how you would aid the DE&I office in rolling out such a training? - See the issues from the assessment & talk about the culture it's a co-creator . . .

3. How will you protect VMI from risk?

- Help people buy into protection w/ met from needs . . .
- Assessment is written in a way that if WPAO record it they think ok.
- They don't attribute any statistics to people.

Latent Bias in Coaching...

Institutional Bias against individual bias assessment.

How do you collaborate with other pieces we have.

How do you hold leaders/OPs accountable... they work with others to help them understand leaders influence culture....

What's most at stake in S goals?

Anything that relates to how people see professionalism or structure of who they are created for...

The buying in of the goals & how people see themselves in the goals.

Spent a little too much time on areas

How help VMI in not with new administration, i.e. no CRT
- Make sure that the message are on board so that there isn't such division. Use insistent not insisting in conversation...

How to help in here.

- try to help identify how/why people are resistant.

- Alignment with CBO & various Academy.

- try with least division between Vontas and CBO

Call the sculptures = 85% (they sit around while things happen)

Do people see it? Do people see it as a problem? Do they see how they can impact it.

What the colloquial regard is against DEI?

I dislike the group...

Colloquial regard isn't good or bad...

The course from belonging to inclusion is the only course they could do this semester.

1. VMI seeks to intentionally strengthen its commitment and work around DEI to aid the institute in achieving its Inclusive Excellence Plan goals and objectives. Before July 2021 there was no DE&I Office, Inclusive Excellence strategic plan, face-to-face Inclusive Excellence activities for the Corps of Cadets, faculty, or staff. Does that information change your approach to your proposed work with VMI? If so, how? *Meet VMI where they are / they have experience they will grow. VMI gives direction they guide*

2. The RFP notes that the organization must be able to provide Inclusive Excellence training that includes guidelines, cultural sharing, areas of modification, bias intervention options, and DEI language that best fits the VMI community

Can you please describe similar experiences you have in delivering DE&I trainings?

Can you please discuss how you would aid the DE&I office in rolling out such a training?

They will do a walk through of the organization. Every group (cadets, faculty & staff) may have different perspectives. Assessment will include interviews with key people

3. How will you protect VMI from risk?

Talking points for the community around DEI PR message... Align with the mission goals of VMI & they also acknowledge VMI has good staff helping & get it out

Help writing curriculum
lots of military

- Review the already collected data

help writing curriculum
lots of military

- Project Management Schedule View

15-60 minutes "sprint training"

- "Quality Inclusion" (you can have different people of each other.)

Tracy time only 4/6/8 hrs term sustainability.

Emphasized bias, review on some of the topics

Assume most things are contrived & advanced models.

"Every system ~~in~~ in an organization is designed to get what they're getting."

"Inclusion Intelligence" is a term they use about mirroring your circles.

Support me - field they use messages that help me as a way to support.

People need to know we as an institution are serious.

It could happen now with the software she showed.

They can do some subtle things as soon as they get the contact.

Exhibit 49

Carmack

Veritas Academy

Tony Farmer
Chris Armstrong
Vince Brantley
Carla Mena

1 Carla - Strategic Source ~~Code~~ Review
What do we currently have
real human issues

2 Vince - Talk to the collective to identify how
they define DEI
Plant 1st Star

3 Chris - Quantitative vs Qualitative
head vs heart
Root orientated
Symptomatic concerns
Human centered assessments as well as
metrics

4 Vince - Training & Plans
Neutral in discovery
Passionate in Plans
Emotional Intelligence Training
Co-create plans with internal change agents

SC = Strategic Communication

5. Carla - Coaching + Consulting
Aid facilitator

Participant Fatigue - leans on hope
"Trust"

Preventing overreliance
"Pandora's Box"

Use their words - not replace their words
Get beyond their assumptions

Culture
Y culture

Head vs Heart

Focus on Equity and Belonging over Diversity
and Inclusion

Culture
Sculpture

How will we know that we answered our
why?

Changing hearts & minds

Facilitation over instruction

Subjective topics - variety of definitions -
easy to criticize

Collective regard

DL - turned on elevator? @ 9:54
TS - stay longer?

Buy in at all levels

Solutions that can actually be accomplished
→ what can legally be accomplished

* Maintaining integrity + moral courage *

Human centered + high touch

① Who would be facilitators? Merge of all 3 →
Students, staff + faculty - 2 @ all times

COL Love -

How will you protect VMI from risk? (why)
ASK

~~Assessment~~

Written with FOIA in mind

Tinny - DEI @ upper levels?

Vince - listen to them - learn - understand
their standards

Leaders don't define the culture

* 5 Goals developed by LTC Love - where
are they? What are they?

VINCE - inciteful = not inciting

Kliner - How to assist VMI with new government? Critical Race Theory

Collective Regard -

Governor tends to respond to criticism + complaints

How will you support the CEO - people who don't support her

CK Business Strategies

Corrin + King

Did not provide slides to ^{their} team on Zoom

Military backgrounds

Results driven

Highly interactive & engaging

Leadership initiatives

Leadership

VASCOPP School?

① COL Love - strengthen commitment to Inclusive Excellence: Meet customers where they are & where they want to go. General to the specific. More assessments: would affect timeline

② Inclusive excellence training:

③ How to protect VMI from risk? Develop a DEI "talking points" campaign. Confidentiality

Align with mission + message + values. Find the positive and focus on those

Sketch Lifelong learning + inclusive excellence: Training is an event, Mentoring, Continuing classes. Then the rest is on the individual. Build awareness, Can't force inclusion
→ Video production team ←

Kline Youngkin - CRT + DEI:

Sen Help leadership stay accountable? Reporting -
More YMI focus on assessment & training

→ Don't expect what you don't inspect -

Timing? Start March! if contract awarded immediately

* - 5 Goals on IET is one more, challenging - will send response

Tracy - None

* Marketing Team / Social Media

CK - what is the take away for what the cadets get from training?

- JL
- 50% of commissioning cadets to be cultural competent
 - lifelong learning + growth

KK Majority may not experience issues but ~~is~~ a large minority may have

AR Old dog new tricks

New Point Strategies

Allen Fuller Hubbard

Karetha Hubbard - Father in law - YMI grad

Daisy Lung - Billy Maus

Stephanie Goebel - Naval Academy - Navy ^{13 years}

- Did web site focused on YMI + Citadel female Cadets

Chris Kilmartin - has consulted @ YMI since women were admitted

Karen Walter - retired Marine ^{WRE} psychologist

Holistic Approach with military experience

Framework of services - Customized delivery

* 6-Phase consulting

① Where are you currently

② Senior leadership writing

③ Senior training coaching

④ Manager/supervisor training

⑤ All-staff training

⑥ Evalo + outcomes

NP

What is VMI's Vision?

OL

① Lifelong Learning

Implicit, unconscious bias - what to do about it
Cultural Competence

~~OL~~

Respect in the workplace for West Point

Kline Youngkin & CRT

Leadership Accountability - top down

"Own" message & steps to achieve goal

Ready to do in-person training - Assess through
March - training in April

OL

Protect VMI from risk? Risk of what?

Bad publicity?

Helping VMI be less of a focus? Unless positive?

NP

Control who talks to the press. Shared understanding
of what information is shared with the press.

Ranking
DEI Meeting 2/11/22 3:00

V CK
| |
| |
| |

Love: 1. New Point - very good - Polished + genuine
2. Veritas - polished
3. CK Strategy

Sketch: 1. New Point
2. Veritas
3. CK Strategy

Kline 1. New Point - sound science
③ Veritas - didn't like the science,
④ everything is subjective, ^{stay} neutral
② CK Strategies

Gen 1. New Point - science, diversity of skills +
people, VMI connection, good response to
risk question (outsiders can say what
insiders can't). Facilitators of learning.
Respect + interaction among team.
2 Veritas + CK

Lackey: 1. New Point - support to CDO, plan
for employees
2. Veritas - touchy feely
3. CK Strategy

①. NDI - Stays out for 10 days

Exhibit 50



Evaluator: Keith Kline

EVALUATION AND AWARD CRITERIA
RFP # **V211-22-054**
Diversity, Equity, and Inclusion (DEI) Consultation and Training

Offeror: Newpoint Strategies, LLC

Date: 1/10/2022

Evaluation Criteria	VALUE	SCORE
Plan for providing DEI services, tailored to VMI needs	20	17
Qualifications and experience of Offeror	20	18
Price (Scored by Procurement Services)	15	14.97
Implementation, Planning and Services	15	13
References where similar goods and/or services have been provided	10	7
Participation of Small, Women-Owned and Minority (SWaM) Business (Scored by Procurement Services)	20	20
TOTAL	100	99.97 55

Notes/Comments I am concerned about tentative plan to use webinars & videos for cadets; I like "upstarts" concept; good experience working with military including academies & even prior connection to VMI; nice mix of DEI spots & military experience/understanding



Evaluator: Keith Kline

EVALUATION AND AWARD CRITERIA
RFP # **V211-22-054**
Diversity, Equity, and Inclusion (DEI) Consultation and Training

Offeror: Veritas Academy

Date: 1/10/2022

Evaluation Criteria	VALUE	SCORE
Plan for providing DEI services, tailored to VMI needs	20	12
Qualifications and experience of Offeror	20	13
Price (Scored by Procurement Services)	15	15
Implementation, Planning and Services	15	11
References where similar goods and/or services have been provided	10	8
Participation of Small, Women-Owned and Minority (SWaM) Business (Scored by Procurement Services)	20	20
TOTAL	100	79

144

Notes/Comments Small, minority-owned business; CDC is a client; some military experience/understanding; unclear credentials; I like the mention of "root issues"; unclear content/plan



Evaluator: Keith Kline

EVALUATION AND AWARD CRITERIA
RFP # V211-22-054
Diversity, Equity, and Inclusion (DEI) Consultation and Training

Offeror: CK Business Strategies, LLC & Global Insight Productions Date: 1/10/2022

Evaluation Criteria	VALUE	SCORE
Plan for providing DEI services, tailored to VMI needs	20	20
Qualifications and experience of Offeror	20	20 19
Price (Scored by Procurement Services)	15	2.5
Implementation, Planning and Services	15	15
References where similar goods and/or services have been provided	10	10
Participation of Small, Women-Owned and Minority (SWaM) Business (Scored by Procurement Services)	20	80
TOTAL	100	86.5 104

Notes/Comments SWaM company; Great mix of DEI experts & military experience/
understanding; I like the mention of humility & commitment; I like the
mention of Honor as a focus area because we need to get DEI
incorporated into VMI's definition of honor; I like that they discuss
revisiting recent internal assessments that have already been done;
Training on Post; I like the emphasis on leadership; Love the primer
method; Love the sustainability methods; Love the Barrow
Analysis's methodology; Outstanding plan; Newby (Fredericksburg);
Used by at least 3 other universities, including UVA; As
close to perfect as we can get; A lot of online degrees but
that is starting to become more acceptable



Evaluator: Keith Kline

EVALUATION AND AWARD CRITERIA

RFP # **V211-22-054**

Diversity, Equity, and Inclusion (DEI) Consultation and Training

Offeror: Center for Applied Innovation, LLC

Date: 1/10/2022

Evaluation Criteria	VALUE	SCORE
Plan for providing DEI services, tailored to VMI needs	20	10
Qualifications and experience of Offeror	20	10
Price (Scored by Procurement Services)	15	0
Implementation, Planning and Services	15	10
References where similar goods and/or services have been provided	10	7
Participation of Small, Women-Owned and Minority (SWaM) Business (Scored by Procurement Services)	20	20
TOTAL	100	57

37

Notes/Comments

Virginia-based; consulted by Northampton;
good military experience/understanding, relationships; Best team
includes VMI alumni -> potential bias;
like root-cause analyses; Too much military;
plan is unclear and sound like a military op-order;
some military is great; all military not great for that
purpose



Evaluator: Keith Kline

EVALUATION AND AWARD CRITERIA
RFP # **V211-22-054**
Diversity, Equity, and Inclusion (DEI) Consultation and Training

Offeror: CIDIS

Date: 1/10/2022

Evaluation Criteria	VALUE	SCORE
Plan for providing DEI services, tailored to VMI needs	20	13
Qualifications and experience of Offeror	20	15
<i>Price (Scored by Procurement Services)</i>	15	.19
Implementation, Planning and Services	15	10
References where similar goods and/or services have been provided	10	8
<i>Participation of Small, Women-Owned and Minority (SWaM) Business (Scored by Procurement Services)</i>	20	20
TOTAL	100	66.19 410

Notes/Comments Based on VMI/VA, one of contracts is for \$3 million; types:
75% of consultants have served in military; like mention of barriers;
like emphasis on leaders being inclusive & accountable; no mention
of CoPs, not as tailored to VMI as some.



Evaluator: Keith Kline

EVALUATION AND AWARD CRITERIA
RFP # **V211-22-054**
Diversity, Equity, and Inclusion (DEI) Consultation and Training

Offeror: CTW LLC

Date: 1/10/2022

Evaluation Criteria	VALUE	SCORE
Plan for providing DEI services, tailored to VMI needs	20	15
Qualifications and experience of Offeror	20	16
Price (Scored by Procurement Services)	15	3.15
Implementation, Planning and Services	15	10
References where similar goods and/or services have been provided	10	7
Participation of Small, Women-Owned and Minority (SWaM) Business (Scored by Procurement Services)	20	20
TOTAL	100	71.15 48

Notes/Comments SWaM amer; currently based out of Virginia; good experience working with military; diverse team with diverse expertise; like the part about "neurobiology of bias and trauma responses"; content/plan not as clear as with some of others



Evaluator: Keith Kibre

EVALUATION AND AWARD CRITERIA
RFP # V211-22-054
Diversity, Equity, and Inclusion (DEI) Consultation and Training

Offeror: FIG Strategy & Consulting

Date: 1/10/2022

Evaluation Criteria	VALUE	SCORE
Plan for providing DEI services, tailored to VMI needs	20	20
Qualifications and experience of Offeror	20	19
Price (Scored by Procurement Services)	15	3.04
Implementation, Planning and Services	15	14
References where similar goods and/or services have been provided	10	9 6
Participation of Small, Women-Owned and Minority (SWaM) Business (Scored by Procurement Services)	20	20
TOTAL	100	81.04 58

Notes/Comments Based in Las Vegas - could make it challenging for them to have a regular presence on post; few contracts but big money ones; "VMI's sterling reputation came to a screeching halt in June of 2021" is not entirely true because reputation has taken numerous hits over the years; Did their homework on VMI; SWaM business; Like focus on VMI brand; like job putting everything in context; nice mix of DEI experts & military experience/understanding; Really like what they said about military culture & unspoken expectations that reinforce conformity & discourage differences & overcoming this; nice outline of plan; very informative proposal; Only 4 years experience but during relevant time



Evaluator: Keith Kline

EVALUATION AND AWARD CRITERIA
RFP # V211-22-054
Diversity, Equity, and Inclusion (DEI) Consultation and Training

Offeror: iPondr SOC

Date: 1/10/2022

Evaluation Criteria	VALUE	SCORE
Plan for providing DEI services, tailored to VMI needs	20	12
Qualifications and experience of Offeror	20	12
Price (Scored by Procurement Services)	15	4.5
Implementation, Planning and Services	15	10
References where similar goods and/or services have been provided	10	6
Participation of Small, Women-Owned and Minority (SWaM) Business (Scored by Procurement Services)	20	0
TOTAL	100	44.5 40

Notes/Comments Based out of MN - will they be able to be a consistent presence on Post; small, woman-owned business; only 1 yr, 6 months in business; Richard Blinn College is a client; many types; core training is web-based but willing and able to do face-to-face; pretty good description of content



Evaluator: Keith Kline

EVALUATION AND AWARD CRITERIA
RFP # V211-22-054
Diversity, Equity, and Inclusion (DEI) Consultation and Training

Offeror: Mayadan Consulting Associates LLC

Date: 1/10/2022

Evaluation Criteria	VALUE	SCORE
Plan for providing DEI services, tailored to VMI needs	20	11
Qualifications and experience of Offeror	20	15
<i>Price (Scored by Procurement Services)</i>	15	3.21
Implementation, Planning and Services	15	9
References where similar goods and/or services have been provided	10	3
<i>Participation of Small, Women-Owned and Minority (SWaM) Business (Scored by Procurement Services)</i>	20	.4
TOTAL	100	41.71 BB

Notes/Comments SWaM business; Virginia based; 30 years of experience
but only 2 small contracts currently; like the DEI curriculum)
good background in education; small team; unclear content
A plan



Evaluator: Keith Kline

EVALUATION AND AWARD CRITERIA
RFP # V211-22-054
Diversity, Equity, and Inclusion (DEI) Consultation and Training

Offeror: Racial Equity Group

Date: 1/10/2022

Evaluation Criteria	VALUE	SCORE
Plan for providing DEI services, tailored to VMI needs	20	18
Qualifications and experience of Offeror	20	17
Price (Scored by Procurement Services)	15	11.04
Implementation, Planning and Services	15	14
References where similar goods and/or services have been provided	10	8
Participation of Small, Women-Owned and Minority (SWaM) Business (Scored by Procurement Services)	20	0
TOTAL	100	68.04 57

Notes/Comments Based in Texas - how regularly can they have a presence on Post; SWaM Business - minority-owned; Contracts with USA and US Military; nice combination of DEI efforts & military experience/understanding; Like the framework; although they say "can be adapted to other social equity categories such as LGBTQ, abilities/disabilities, etc." it is a little concerning that this isn't already built in



Evaluator: Keith Kline

EVALUATION AND AWARD CRITERIA

RFP # V211-22-054

Diversity, Equity, and Inclusion (DEI) Consultation and Training

Offeror: TMI Consulting, Inc.

Date: 1/10/2020

Evaluation Criteria	VALUE	SCORE
Plan for providing DEI services, tailored to VMI needs	20	16
Qualifications and experience of Offeror	20	16
Price (Scored by Procurement Services)	15	1.16
Implementation, Planning and Services	15	11
References where similar goods and/or services have been provided	10	6
Participation of Small, Women-Owned and Minority (SWaM) Business (Scored by Procurement Services)	20	20
TOTAL	100	70.16

49

Notes/Comments SWaM business based in Richmond; like the emphasis on
commitment from senior leadership; don't think "fractional" COO
necessary with Jenica here; good detail on contact officers



Evaluator: Keith Kline

EVALUATION AND AWARD CRITERIA
RFP # V211-22-054
Diversity, Equity, and Inclusion (DEI) Consultation and Training

Offeror: WGU Labs

Date: 1/10/2022

Evaluation Criteria	VALUE	SCORE
Plan for providing DEI services, tailored to VMI needs	20	16
Qualifications and experience of Offeror	20	17
<i>Price (Scored by Procurement Services)</i>	15	8.44
Implementation, Planning and Services	15	12
References where similar goods and/or services have been provided	10	9
<i>Participation of Small, Women-Owned and Minority (SWaM) Business (Scored by Procurement Services)</i>	20	0
TOTAL	100	62.44 54

Notes/Comments Based out of Utah; Will they be able to have a consistent presence on foot; many accounts; some military experience/understanding. I like part about instilling desire to change; disagree about training not being mandatory; quite a team; some good content but would like to see more outside of race; Could be too much time on data collection for VMI

Newport Strategies

2/1/2022

- ~~Great ties~~ to military academies, including VMI
(multiple)
- Emphasis on involvement of stakeholders; Collaborative effort
- "Can't change opinions. Can change behaviors."
- Training for cadets & ^{virtual?} ~~parent~~
- Interactive training
- Did mention that "does it mean I'm right and you're wrong? just that we differ?"
- Sometimes outsiders can say things insiders can't

* science

* psychometrics

• Culture = collective regard & ~~social~~ ^{social} norms

• Talk to 25% of your population; what do they see as DE, AI

• Head + heart assessment

~~Keep getting~~

• 4 Basic questions:

“subjective”

- ① Overall culture
- ② Symptomatic things
- ③ Root issues
- ④ Root solutions

but those
social
collective regard
can be good
or
bad

• 100% of these problems are human-centered; policies are written by humans

• Neutral in discovery but passionate execution

• Train change agents within your organization

• In future realistic scenarios

• Co-create with people here

• Want to leave organization so doesn't need us anymore

Start
change
behavior
No
workshops

◦ Creating messaging

◦ Challenges: Leadership fear/concern

Establish trust; then challenge assumptions & generalizations

◦ Code switching

◦ Take symptomatic concerns but put root issues around them

◦ Think of themselves as the "guide on the side"

* Do not teach unconscious bias training

◦ Could do a ^{version of} training for a semester if had so much

CK Business Strategies

2/4/2022

- A lot of staff has military background
- "Understanding cadence"
- masters in people engagement

• Implicit bias

- Cadet DEI Advocacy Groups or DEI Champions
Videos.
- Cadets taking ownership of what is happened
- So much wisdom

• Robust video production team → ~~can~~
can create video library

* Message needs to come from leadership

* Inclusion - Intelligence

* Messaging

* Connect or manage those people

• If no consequence to inappropriate behavior,
it will continue

• Robust & dynamic marketing team → create a narrative

Exhibit 51

Offshore

Veritas

2/3/2022

{ Tony Turner COO
Chris Armstrong co-owner
Jina Brath
Carla Menon

* Strategic Source Review

* DEI Culture Session
Collective Sessions (25%)

Assessment

Idea & Heart HUMAN CENTRED
Symptom

* Overall health / symptomatic / Root issues / Root solutions

Training + Plans -

- ↳ * Neutral * in discovery

↳ Planning - Implementation

↳ Co Create to eliminate the need for consultant

Coaching & Consulting - aid facilitators

Questions —

- ① Facilitators —
who do you envision?
FACULTY
STAFF
CADETS?

Merge of
all three

Everyone is
part of the
solution

* Fatigue

* Trust

(*) Informed Expression

* Challenge fears & assumptions

* People want to see themselves in the assessments

→ No pre-conceived notions

No making the means justify the end.

② How do you measure effectiveness? BUY IN / DEFENSE OF FINDINGS
/ VALIDATION

* No training before assessment

— not regimented / out-of-the-box training /

① Love - ~~about~~ about DEI office not existing
 • no program until she arrived
 Knowing that - does this change your approach?
 • No - unless you introduce other than human beings

② Similar experiences:
 - Fort Bragg San Antonio AFB
 - DIA
 - NGA

③ unconscious BIAS - no BY US

④ RISK AVOIDANCE

Amoral

- Life long learning
 A - culture - listening - see others differently
 Tools for the tool kit
 (cup example) Transformational

Thin

DEI - upper level VP level support
 LISTEN - it is the + accountability
 SAME Process

Leaders do not define the culture - they influence it.

(H)

Timmi - continued

Excellence Plan -

* 5 Goals (area of growth)

Any 1 more difficult than any other?

- Buy in - of all goals

- DEFENSABILITY

COMMUNICATION

INCLUSION IN THE SOLUTION

• LISTEN - LISTEN - LISTEN •

NOTION

"Fixing something that isn't broken"

KLINE

Youngkin - no CRT / VA Policies

A: - CANNOT ignore collective regard

constituency complaints - won't do anything
CHAOS - is where they intervene

They only go where there is FIRE

↳ they don't believe there is a FILE here.

INSIGHTFUL not inciteful / respectful of all opinions

KLINE

↳ How do you support the CDO?

Against people who wish to stop/undermine her efforts.

A: Agreed - LISTEN - understand the
Concerns - why? Want to move forward.
Direct engagement/alignment

Culture sculpture - do nothings
Culture =

See it?

See it as a problem?

See the impact of it?

See it as your problem to solve?

What is my role?

Kline

- Collective Regard - is overwhelming negative

A: ↳ is neither good or bad

it is all experiences

LACKEY no questions

Love - Inclusive Excellence THIS SEMESTER

A: - only one career because Assessment is
Required to move forward.

* CK Business Strategies

2/4/22

- Corrin + King BusStrat LLC -

McWilson CFO

* Kim Taylor-Wilson

* Jim / Mark - virtually
White / Garrett

Fredericksburg

Quantico

Global Insights Productions

ON LINE TRAINING

VMI - Unique

↳ visit in the 80's -

understand military culture / underpinnings

Legacy of Military Experience
WWI, WWII

~~Small~~ Small classes - to interact

POINTS: We are glad you are here / you were selected for
a field of 16 responders VMI is committed to
making an award as soon as practical.

IN PERSON TRAINING IS PREFERRED

Q - I noticed that VASCUPP is on your client list. What type of training was conducted for that group?

A.

Q: Pre Training Assessment

Answer

- How long do you anticipate that takes to develop? 4 Days

- When would you start training?
→ MAR - APR 2022

Participant ~~Surveys~~ Surveys after each session.

Sustainability is Key - Reinforcement

DEI advocacy groups with cadets

Questions

COL LOVE

Byrne July 21 / no DEI

- * no change in approach
- = Grand zero experience

Confidentiality

alignment with goals, mission & messages.

1,000's of Positive experiences at VMI that are not all

"Don't expect what you don't inspect"

Video library - available

(Inclusion Intelligence)

Different people - more information from different points of view.

* Accountability - ~~DEI~~ TRACKING DATA

SCHOL?

Performance Appraisals

* Not familiar with Excellence Plan

New Point Strategies

2/4/22

* Dr Estelle Marie Montgomery

Jaretta Hubbard

civility in the work place
'33 PTL Cops of Engineers

Allen Fuller Hubbard

Stephane 1980 Annual Academy
Focused on VMI/Citadel
Entrance to VMI for women

Chris -> * VMI - consultant VAW (women)
-> also Sexual Assault Training
Naval Academy

Z Z Abdul-Razek NPL
-> Univ of Md

Not off the Shelf

* study/assess/develop Meet you where you are
Customized delivery

@PHASE

- ASSESSMENT (consult)
- Senior Leadership debrief - TOP DOWN -
- Senior Training - Supervisors Training - all staff
- Post Training Report

- RFP → Contract

- Changes occur between then and now

Collaborative - collect THE DATA

Do WITH You

Can't change opinions, you change behaviors

Data Assessments

Training

LEADERSHIP

MID LEVEL Mgmt

EMPLOYEE

Post Training Option

- all are 3 Hours -

Holistic Training - no lecturing

Personally relevant

18 Months

Leadership Training October 22

* See Recordings for questions

1984

with Karotta Hubbard - Fowler W-W

= West Point
= Annapolis

= Air Force Academy

- Staff training is different from leadership training

(4W) (H/L) (1A) (3B)
- W-9 M-2

Blind Spots a/drawing

= We all have them / we need to be aware of them

4PM - Kline left

Training this May? (Yes)

* Assents of March

Design - Rollout 12 April

3 week training - INTENSE

Tinnir - Hybrid we really aren't military

I have a bird on my shoulder -

Doesn't mean anything - just I am a field professor

"So - compare us more to
University of Maryland
rather than a military academy."

Deliberation Notes

2/11/22

Jamie Love

- ① Last New Point
- Clear Answers
 - Support - CDD
 - Good Ideas
- Presentations well thought
Genuine

- ② Veritas -
- Well thought Blinded

- ③ CK -
- Technology was not on their side

Amridd Sheikh

- ③ CK - technology

- ② Veritas - set the bar high, really liked

- ① New Point - diverse background
of employees

Keith ~~Line~~

①

Looking New Point
Science for it

Just psychological science
Psychometrics
Impressive Energetic

②

CK

Substance
only because

③

Veritas

Polished, comfortable

Red flags → didn't like the science

→ Unconscious bias

Stance - Everything is subjective

Staying neutral

Someone needs to say something is wrong when it's wrong

Kum bi ya

No substance

Tinni - Senn

① Newpoint — leaps and bounds

data. experience

Diversity of people, skills

ODD impediments — formal resources

- outsiders can say what insiders
can not.

Experience — years + issues

Facilitators/learners not Trainers

↳ interaction

② Veritas

↳

Polish / into absurdity
i.e., culture / vulture

③ - CK

Tracey Lackey

② Ventas / human heart

① Newport

- plan was flexible
- experience

③ CK

Exhibit 52



Evaluator: Lackey

EVALUATION AND AWARD CRITERIA

RFP # **V211-22-054**

Diversity, Equity, and Inclusion (DEI) Consultation and Training

Offeror: New Pair

Date: 1/10/22

Evaluation Criteria	VALUE	SCORE
Plan for providing DEI services, tailored to VMI needs	20	20
Qualifications and experience of Offeror	20	20
Price (Scored by Procurement Services)	15	4.97
Implementation, Planning and Services	15	15
References where similar goods and/or services have been provided	10	10
Participation of Small, Women-Owned and Minority (SWaM) Business (Scored by Procurement Services)	20	20
TOTAL	100	99.97

68

Notes/Comments

on site



Evaluator: Lackey

EVALUATION AND AWARD CRITERIA

RFP # **V211-22-054**

Diversity, Equity, and Inclusion (DEI) Consultation and Training

Offeror: Ventus

Date: 1/10/22

Evaluation Criteria	VALUE	SCORE
Plan for providing DEI services, tailored to VMI needs	20	20
Qualifications and experience of Offeror	20	15
<i>Price (Scored by Procurement Services)</i>	15	15
Implementation, Planning and Services	15	15
References where similar goods and/or services have been provided	10	5
<i>Participation of Small, Women-Owned and Minority (SWaM) Business (Scored by Procurement Services)</i>	20	20
TOTAL	100	90

55

Notes/Comments

at 3yrs + months ago
pp. 8. Culture Sessions



Evaluator: Lackey

EVALUATION AND AWARD CRITERIA
RFP # V211-22-054
Diversity, Equity, and Inclusion (DEI) Consultation and Training

Offeror: CK Bus. Strat.

Date: 1/10/22

Evaluation Criteria	VALUE	SCORE
Plan for providing DEI services, tailored to VMI needs	20	20
Qualifications and experience of Offeror	20	5
<i>Price (Scored by Procurement Services)</i>	15	2.5
Implementation, Planning and Services	15	10
References where similar goods and/or services have been provided	10	0
<i>Participation of Small, Women-Owned and Minority (SWaM) Business (Scored by Procurement Services)</i>	20	20
TOTAL	100	57.5

35

Notes/Comments _____

pg. 9 - in person

20yrs experience in business management



Evaluator: batley

EVALUATION AND AWARD CRITERIA
RFP # **V211-22-054**
Diversity, Equity, and Inclusion (DEI) Consultation and Training

Offeror: CAI

Date: 1/10/22

Evaluation Criteria	VALUE	SCORE
Plan for providing DEI services, tailored to VMI needs	20	20
Qualifications and experience of Offeror	20	20
Price (Scored by Procurement Services)	15	0
Implementation, Planning and Services	15	15
References where similar goods and/or services have been provided	10	10
Participation of Small, Women-Owned and Minority (SWaM) Business (Scored by Procurement Services)	20	20
TOTAL	100	85

65

Notes/Comments

✓ VA SCUPP contract
 ✓ pg 22
 ✓ extensive military culture understanding



Evaluator: lackey

EVALUATION AND AWARD CRITERIA
 RFP # **V211-22-054**
 Diversity, Equity, and Inclusion (DEI) Consultation and Training

Offeror: CIDIS

Date: 1/10/22

Evaluation Criteria	VALUE	SCORE
Plan for providing DEI services, tailored to VMI needs	20	20
Qualifications and experience of Offeror	20	20
<i>Price (Scored by Procurement Services)</i>	15	20
Implementation, Planning and Services	15	2
References where similar goods and/or services have been provided	10	15
<i>Participation of Small, Women-Owned and Minority (SWaM) Business (Scored by Procurement Services)</i>	20	10
TOTAL	100	85.2

65

Notes/Comments

✓ 20yrs exp.

✓ pg. 3. in person



Evaluator: Lackey

EVALUATION AND AWARD CRITERIA
RFP # **V211-22-054**
Diversity, Equity, and Inclusion (DEI) Consultation and Training

Offeror: GTW

Date: 1/10/22

Evaluation Criteria	VALUE	SCORE
Plan for providing DEI services, tailored to VMI needs	20	10
Qualifications and experience of Offeror	20	15
<i>Price (Scored by Procurement Services)</i>	15	3.15
Implementation, Planning and Services	15	7
References where similar goods and/or services have been provided	10	7
<i>Participation of Small, Women-Owned and Minority (SWaM) Business (Scored by Procurement Services)</i>	20	20
TOTAL	100	62.15 39

Notes/Comments

4 days in person
19 provide in person + virtual training



Evaluator: hockey

EVALUATION AND AWARD CRITERIA
RFP # **V211-22-054**
Diversity, Equity, and Inclusion (DEI) Consultation and Training

Offeror: FLG

Date: 1/10/22

Evaluation Criteria	VALUE	SCORE
Plan for providing DEI services, tailored to VMI needs	20	10
Qualifications and experience of Offeror	20	10
<i>Price (Scored by Procurement Services)</i>	15	3.04
Implementation, Planning and Services	15	15
References where similar goods and/or services have been provided	10	0
<i>Participation of Small, Women-Owned and Minority (SWaM) Business (Scored by Procurement Services)</i>	20	20
TOTAL	100	58.04

35

Notes/Comments

Oct. 2017

no previous programs

online programs

(included cost)



Evaluator: Lackey

EVALUATION AND AWARD CRITERIA
RFP # **V211-22-054**
Diversity, Equity, and Inclusion (DEI) Consultation and Training

Offeror: iponder

Date: 1/10/22

Evaluation Criteria	VALUE	SCORE
Plan for providing DEI services, tailored to VMI needs	20	20
Qualifications and experience of Offeror	20	5
<i>Price (Scored by Procurement Services)</i>	15	4.5
Implementation, Planning and Services	15	15
References where similar goods and/or services have been provided	10	0
<i>Participation of Small, Women-Owned and Minority (SWaM) Business (Scored by Procurement Services)</i>	20	0
TOTAL	100	44.5 40

Notes/Comments _____

ext 1yr - 6 months ago

References?

✓ empathetic approach

✓ in person



Evaluator: Jackey

EVALUATION AND AWARD CRITERIA

RFP # V211-22-054

Diversity, Equity, and Inclusion (DEI) Consultation and Training

Offeror: Mayadea

Date: 1/10/22

Evaluation Criteria	VALUE	SCORE
Plan for providing DEI services, tailored to VMI needs	20	10
Qualifications and experience of Offeror	20	15
Price (Scored by Procurement Services)	15	3.31
Implementation, Planning and Services	15	10
References where similar goods and/or services have been provided	10	0
Participation of Small, Women-Owned and Minority (SWaM) Business (Scored by Procurement Services)	20	4
TOTAL	100	36.71 35

Notes/Comments

proposals/materials are poor copies

✓ 30yrs exp. working w/with DEI concerns
 + domestic violence

? enough DEI training experience to launch VMI program?



Evaluator: Wacker

EVALUATION AND AWARD CRITERIA

RFP # **V211-22-054**

Diversity, Equity, and Inclusion (DEI) Consultation and Training

Offeror: Racial Equity Group

Date: 1/10/22

Evaluation Criteria	VALUE	SCORE
Plan for providing DEI services, tailored to VMI needs	20	15
Qualifications and experience of Offeror	20	20
Price (Scored by Procurement Services)	15	11.04
Implementation, Planning and Services	15	15
References where similar goods and/or services have been provided	10	10
Participation of Small, Women-Owned and Minority (SWaM) Business (Scored by Procurement Services)	20	0
TOTAL	100	71.04

Notes/Comments

P.3. Training offered virtually & in-person
est. 2004

concerns:

- ① diversity is more than just about race
- ② UVA program in one dept, finance, are they experience enough to handle entire Post



Evaluator: Lackey

EVALUATION AND AWARD CRITERIA
RFP # **V211-22-054**
Diversity, Equity, and Inclusion (DEI) Consultation and Training

Offeror: TMI

Date: 1/15/22

Evaluation Criteria	VALUE	SCORE
Plan for providing DEI services, tailored to VMI needs	20	20
Qualifications and experience of Offeror	20	20
<i>Price (Scored by Procurement Services)</i>	15	1.16
Implementation, Planning and Services	15	15
References where similar goods and/or services have been provided	10	10
<i>Participation of Small, Women-Owned and Minority (SWaM) Business (Scored by Procurement Services)</i>	20	20
TOTAL	100	96.16

65

Notes/Comments _____

CUE COLUMN

NOTES

Virtus
Human Centered, High Touch
~~Work from~~ -

DEI & Belonging
- talk to collective -
250. identify what they
see on DEI

create Head & Heart assessment (human centered)
- Why do ~~things~~ ^{things} exist

Training
identify the most beneficial type of training
for this organization

NOT Signs
on the stage

Meaning metrics -
(NOT) we need to listen to each other
we need to go to HBCU more
- Focus on Equity & Belonging OVER
Diversity & Inclusion

- Utilize facilitation over assessment

Measure success -
Buy in - At All levels
Defensibility of Findings - do you see yourself?
Credibility & Recommendations
Maintaining Integrity & Moral Courage

SUMMARY

→ 02 - 03
3/14

do they see it
do I see a problem
do I see a solution

- who authorized to be facilitator
 - cadets, staff, faculty
- approach working w/ a new program
 - human centered
 - how collective feels about before & now
- exp- DEI+B assessments
 - Fort Bragg resume

- how w/ virtues protect UMI from risk
 - acknowledging the gray
 - model neutrality - so list of ground rules not ~~is~~ necessary
 - trust
 - assessments written w/ FOIA in mind

- ~~online~~ lifelong learning
 - how to support CEO & the work
 - neutrality, gaining trust
 - listen
 - reach understanding
 - "sides on the side"
- DEI accountability @ leadership level
 - listen to what is important to the individuals

- Strategic Plan for DEI Journeys
 - Buy in to UMI's goals
 - assessment supports the Strategic Plan

- w/ new Gov, state leadership
 - gathering collective information
 - admin responds to where there is fire
 - approach is ~~not~~ useful ~~not~~ to incite

Culture Culture

- who is the expert here
- not the only one who feels this way
- Culture Sculpture
- Stand on the side

Kawatta

New BINT

safe spaces
classroom father in law - Alan Fuller husband

NP ?? to committee

* - is this a fair

- CEO wants ongoing learning
- identify roles & have talks to address them

1. Building from the ground up? how to handle
- look @ plans develop & the coordinate
- help UMI find baseline of assessment?

2. Cornerstone of work -

- "Respect in the workplace"
- take time to est. shared understanding
- They are facilitators of learning -

3. regardless of who is in political power

- focus is on how we work as a team

4. how to support CEO

- in depth side by side assistance

- coaching

- supply resources

- outsiders can sometimes say things insiders cannot

NOT
boxed
options

Study VMI
customize delivery

→ leadership ~~accountability~~ accountability

Feb/Mar Assessment
Apr - Rollout training

Coaching Steps:

1. Assessment
2. Set leadership, buy-in & Plan ~~action~~ action
3. Set level training / coaching
4. Mgr / Supr "
5. Staff " "
6. Evaluation

Protective from Risk 7
- decide who talks to peers & who represents VMI

Training -
Target Aud.

1. Leadership
2. Managers / Sups.
3. employees

Holistic Training
Embed DEI principles @ all levels

Kickoff Mtg.

involvement of stakeholders

Key steps

- create rep group
- data collection & training design
- structured delivery
- post delivery debrief

Data Collection & Assessment

- site visit
- discuss w/ stakeholders
- policy review
- emp prol. & demographics
- focus group discussions

Exhibit 53

From: O'Leary, Patrick O. "Pat"
To: Tomlin, Kathleen H; Carmack, Lynn W
Subject: CAI File Request Letter 2-9-22
Date: Thursday, February 10, 2022 8:35:59 AM

My advice is not to respond to this letter. When the selection process is complete, we should send him a letter advising him when and where the documents are available for his inspection.

Pat

Patrick O. O'Leary
General Counsel
and Senior Assistant Attorney General
Virginia Military Institute
(540) 464-7715 (Office)
(540) 784-6188 (Cell)
olearypo@vmi.edu

Exhibit 54

Carmack, Lynn W

From: Young, John
Sent: Wednesday, February 2, 2022 11:23 AM
To: Tomlin, Kathleen H; Love, Jamica N; Clark, Dallas B
Cc: Sen, Tinni; Carmack, Lynn W; Sheikh, Ammad; Kline, Keith A; Lackey, Tracey M
Subject: Re: DEI Presentation Appointments

Folks,

I'd suggest we quickly convene a small group - today - to clean this up and agree on the path forward. What is the standard procurement protocol to let any agreement? Are we deviating from or following it?

Get [Outlook for iOS](#)

From: Tomlin, Kathleen H <TomlinKH@vmi.edu>
Sent: Wednesday, February 2, 2022 11:02:24 AM
To: Love, Jamica N <lovejn@vmi.edu>; Clark, Dallas B <clarkdb@vmi.edu>
Cc: Sen, Tinni <SenSB@vmi.edu>; Carmack, Lynn W <carmacklw@vmi.edu>; Sheikh, Ammad <sheikhas@vmi.edu>; Kline, Keith A <klineka@vmi.edu>; Lackey, Tracey M <lackeytm@vmi.edu>; Young, John <youngjm@vmi.edu>
Subject: RE: DEI Presentation Appointments

Whoever made the statement is inaccurate. When asked to expound on the process, I did not say that (the SME).

From: Love, Jamica N <lovejn@vmi.edu>
Sent: Wednesday, February 2, 2022 11:01 AM
To: Tomlin, Kathleen H <TomlinKH@vmi.edu>; Clark, Dallas B <clarkdb@vmi.edu>
Cc: Sen, Tinni <SenSB@vmi.edu>; Carmack, Lynn W <carmacklw@vmi.edu>; Sheikh, Ammad <sheikhas@vmi.edu>; Kline, Keith A <klineka@vmi.edu>; Lackey, Tracey M <lackeytm@vmi.edu>; Young, John <youngjm@vmi.edu>
Subject: RE: DEI Presentation Appointments

We record the minutes to assure they are accurate.

From: Tomlin, Kathleen H <TomlinKH@vmi.edu>
Sent: Wednesday, February 2, 2022 10:33 AM
To: Love, Jamica N <lovejn@vmi.edu>; Clark, Dallas B <clarkdb@vmi.edu>
Cc: Sen, Tinni <SenSB@vmi.edu>; Carmack, Lynn W <carmacklw@vmi.edu>; Sheikh, Ammad <sheikhas@vmi.edu>; Kline, Keith A <klineka@vmi.edu>; Lackey, Tracey M <lackeytm@vmi.edu>; Young, John <youngjm@vmi.edu>
Subject: RE: DEI Presentation Appointments

Perhaps the minutes are inaccurate. Not having seen them and no idea who recorded them, there is less credibility in their accuracy than in a standard, repetitive practice. Having been in that DEI committee meeting I did not hear that statement.

From: Love, Jamica N <lovejn@vmi.edu>
Sent: Wednesday, February 2, 2022 10:23 AM
To: Clark, Dallas B <clarkdb@vmi.edu>
Cc: Tomlin, Kathleen H <TomlinKH@vmi.edu>; Sen, Tinni <SenSB@vmi.edu>; Carmack, Lynn W <carmacklw@vmi.edu>; Sheikh, Ammad <sheikhas@vmi.edu>; Kline, Keith A <klineka@vmi.edu>; Lackey, Tracey M <lackeytm@vmi.edu>;

Young, John <youngjm@vmi.edu>

Subject: RE: DEI Presentation Appointments

BG Clark,

Please see the email exchanges below from COL Tomlin; it seems to contradict the BOV DEI Committee meeting minutes.

The minutes note that you stated, "the CDO and MG Wins would make the final decision."

I appreciate any clarity you can provide. It is easier for me to follow a process when I get clear and consistent information from FAS.

Respectfully,

LTC Jamica Nadina Love, D. Ed.

From: Tomlin, Kathleen H <TomlinKH@vmi.edu>

Sent: Wednesday, February 2, 2022 10:18 AM

To: Sen, Tinni <SenSB@vmi.edu>; Love, Jamica N <lovejn@vmi.edu>; Carmack, Lynn W <carmacklw@vmi.edu>; Sheikh, Ammad <sheikhas@vmi.edu>; Kline, Keith A <klineka@vmi.edu>; Lackey, Tracey M <lackeytm@vmi.edu>

Cc: Clark, Dallas B <clarkdb@vmi.edu>

Subject: RE: DEI Presentation Appointments

No., Ma'am. Procurement Services presents the rankings to the Superintendent or designee. COL Love has no contacting authority.

If you are unable to reach consensus, a narrative will be written by Procurement Services stating the facts and submitted to MG Wins or designee and the final decision will still rest there.

From: Sen, Tinni <SenSB@vmi.edu>

Sent: Wednesday, February 2, 2022 10:13 AM

To: Tomlin, Kathleen H <TomlinKH@vmi.edu>; Love, Jamica N <lovejn@vmi.edu>; Carmack, Lynn W <carmacklw@vmi.edu>; Sheikh, Ammad <sheikhas@vmi.edu>; Kline, Keith A <klineka@vmi.edu>; Lackey, Tracey M <lackeytm@vmi.edu>

Cc: Clark, Dallas B <clarkdb@vmi.edu>

Subject: RE: DEI Presentation Appointments

Kathy,

So, the process is that we, the committee, decide our rankings, then you, Kathy, present those rankings to Dr. Love since she is the senior leader in the chain of command by virtue of her position as Chief Diversity Officer. She makes the final decision.

Is there a process in place for the eventuality that we disagree on the rankings?

Tinni

Tinni Sen, PhD (She/Her/Hers)

Alexander P. Morrison 1939 Professor of Economics and Business

Co-Advisor, VMI Promaji Club

Department of Economics and Business

Virginia Military Institute

Lexington, VA 24450

Office: [540.464.7478](tel:540.464.7478), cell: [540.817.8866](tel:540.817.8866)

sensb@vmi.edu

tinnis.sen@gmail.com

Fall 21 Office hours: M 9-11, TTH 1-2pm and by appointment. Make an appointment here
I live and work on the ancestral lands of the Monacan peoples.

From: Tomlin, Kathleen H <TomlinKH@vmi.edu>
Sent: Wednesday, February 02, 2022 9:53 AM
To: Love, Jamica N <lovejn@vmi.edu>; Carmack, Lynn W <carmacklw@vmi.edu>; Sheikh, Ammad <sheikhas@vmi.edu>; Sen, Tinni <SenSB@vmi.edu>; Kline, Keith A <klineka@vmi.edu>; Lackey, Tracey M <lackeytm@vmi.edu>
Cc: Clark, Dallas B <clarkdb@vmi.edu>
Subject: RE: DEI Presentation Appointments

The committee is to rank the firms interviewed at the end of all presentations and reach a consensus on the order. This is done by discussion. Procurement Services will draft the formal recommendation and present it to senior leadership reflecting the desires of the committee. It is a committee recommendation and the final decision on the award rests with solely with MG Wins or his designee; not with any single committee member.

From: Love, Jamica N <lovejn@vmi.edu>
Sent: Wednesday, February 2, 2022 9:47 AM
To: Carmack, Lynn W <carmacklw@vmi.edu>; Sheikh, Ammad <sheikhas@vmi.edu>; Sen, Tinni <SenSB@vmi.edu>; Kline, Keith A <klineka@vmi.edu>; Lackey, Tracey M <lackeytm@vmi.edu>
Cc: Tomlin, Kathleen H <TomlinKH@vmi.edu>; Clark, Dallas B <clarkdb@vmi.edu>
Subject: RE: DEI Presentation Appointments

Greetings All,

Maj. Carmack, you mention below, "hopefully, reach a consensus decision on the firm to recommend for the contract." On Friday, Jan. 28th, at the BOV DEI Committee meeting, BG Clark said that the final decision is up to MG Wins and me.

So I'm trying to understand the role of reaching a consensus if the ultimate decision is for the Superintendent and CDO to make?

Respectfully,
JNL

From: Carmack, Lynn W <carmacklw@vmi.edu>
Sent: Wednesday, February 2, 2022 9:32 AM
To: Love, Jamica N <lovejn@vmi.edu>; Sheikh, Ammad <sheikhas@vmi.edu>; Sen, Tinni <SenSB@vmi.edu>; Kline, Keith A <klineka@vmi.edu>; Lackey, Tracey M <lackeytm@vmi.edu>
Cc: Tomlin, Kathleen H <TomlinKH@vmi.edu>
Subject: RE: DEI Presentation Appointments

Good morning,

Just a reminder that we will have the first DEI Consultation and Training presentation in the Smith Hall Board Room tomorrow morning at 9:00. Then on Friday, we will have presentations at 1:00 and 3:00 PM in the same location. Following the final presentation, the panel will be able to discuss the presentations and written proposals, and hopefully, reach a consensus decision on the firm to recommend for the contract.

Thank you again for your participation in this important solicitation.

Respectfully,

Lynn W. Carmack, CUPO, VCCO, CPSM, CPSP, CPPO
Major, Virginia Militia

Assistant Director, Procurement Services

Virginia Military Institute
314 Smith Hall, Lexington, VA 24450
540-464-7223 Office



New Platform Count-down! eVA is changing!
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[Next Gen eVA](#)

From: Carmack, Lynn W
Sent: Wednesday, January 19, 2022 4:44 PM
To: Love, Jamica N <lovejn@vmi.edu>; Sheikh, Ammad <sheikhas@vmi.edu>; Sen, Tinni <sensb@vmi.edu>; Kline, Keith A <klineka@vmi.edu>
Subject: DEI Presentation Appointments

My apologies for the multiple calendar invitations that were sent. Obviously, using Outlook scheduling is not one of my current skills. However, you should have an appointment for 9:00 AM on Thursday 2/3/22, and appointments at 1:00 and 3:00 PM on Friday 2/4/22.

Respectfully,

Lynn W. Carmack, CUPO, VCCO, CPSM, CPSD, CPPO
Major, Virginia Militia
Assistant Director, Procurement Services

Virginia Military Institute
314 Smith Hall, Lexington, VA 24450
540-464-7223 Office



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Remain in the know by visiting the eVA Transition Newsroom:
[Next Gen eVA](#)

Exhibit 55