

UNIVERSITY ADVANCEMENT

IDEAL- Diversity Action Plan

September 15, 2017

Introduction/Reflection

The University of Oregon's Office of Advancement seeks to promote, engage, leverage and obtain external support for the university's core mission of research, teaching and public service. It does so with the absolute commitment to achieving its objectives by best in class programs, performance and integrity. To that end, the Advancement team strives to pursue an intentional, determined and successful effort in the areas of inclusion, diversity and equity. The proposed IDEAL plan articulates this collective effort. To be clear, this is not a plan to execute our core functions in assisting the university in its own, collective IDEAL efforts - we do fully intend to do this also - but the Advancement IDEAL plan is intended to focus on building awareness, openness, understanding, comprehensive representation and creating a genuine interest in learning about others in pursuit of diversity, equity and inclusion within our own ranks.

We have already begun many important activities in this pursuit over the past several years, including the re-establishment of a new Advancement diversity committee, a preliminary trial student internship program with the intention to recruit diverse student participants, lunch workshops and several all-staff and small group discussions for personal reflections, experiences and expectations. From these on-going efforts, we intend to expand new programs, activities and internal engagement that can deliver honest and inclusive dialog, broader understanding and improved representation of diverse communities among our employee ranks.

Context - The Past Seven Years

In an effort to establish the new plan it is important to reflect on the time leading up to the new IDEAL plan since our last campus-wide diversity plans. During the formation of the last diversity plan, the Advancement organizational structure has shifted multiple times. Over the past decade, the office began as a comprehensive Advancement office which was restructured into two offices in 2009: Development and University Relations (Government Relations, UOAA and Communications). In 2013, the two offices were rejoined into one Advancement operation. Again in 2015, the office was modified to separate University Communications under a standalone Vice President but with administrative support coming from the existing Advancement team. A result of these multiple re-organizations and changeover in staff, the engagement on issues of diversity, equity and inclusion were inconsistent and confusing at best. In some parts of the organization, there were sincere efforts to engage in some level of discussion and engagement on diversity initiatives. In addition to this transition, broader leadership and top leadership changes including five university presidents and two vice presidents in the Office of

Diversity, Equity and Inclusion have made it difficult to connect fragmented efforts with the broader work on campus over the past seven years. But maybe the most challenging issue during this time period, and clearly coming out of the last diversity plan effort, was the over-riding attitude among many of the Advancement staff that the work of diversity, equity and inclusion was not something required or necessary for the Advancement team but to instead provide support to the university's diversity efforts through fundraising, alumni engagement, communications and community engagement. The simple truth is, in general, the Advancement team avoided the collective responsibility of addressing these issues internally. It is this issue that Advancement has been working to address over the past several years.

Advancement's Current State of Diversity, Equity and Inclusion Efforts

In the summer of 2012, the Development office held an all-day staff retreat to discuss and address thoughts, opinions, experiences and aspirations related to diversity for the office. The experience was one that surprised many of the staff. It was a highly participatory and often emotional engagement and it became the launching point to approach a more internal approach to diversity conversations. An immediate outcome was to create a diversity committee of self-nominated staff that would meet monthly. The committee was charged with two basic activities: 1) brainstorm on additional efforts/activities to improve understanding, openness, and interest in diverse cultures, communities and experiences, and 2) brainstorm on efforts to recruit a more diverse community in our employee ranks. In addition, we decided to include a committee update at our monthly staff meetings to foster accountability and transparency of the work. The committee made several recommendations for additional training/programming that were not implemented for a variety of challenges due to the previously mentioned transitions. The committee expanded under the re-organization back to Advancement and the work continues today. Over the past two years, the committee has represented Advancement at the university-wide diversity committee and its work to develop the IDEAL framework. In addition, they have developed and implemented several workshop series, engagement activities and on-going recommendations. The committee has conducted itself with the utmost professionalism and through the commitment to their charge. One lesson learned over the past five years is that the committee's work can sometimes go un-noticed unless there is vigorous effort to connect that work with leadership. There is a danger in creating a committee and turning attention to other matters. It is the responsibility of leadership to ensure that this connection is strong and at the forefront of their leadership responsibilities.

In addition, three years ago, the UOAA launched its first multicultural reunion followed last year with the establishment of several alumni affinity groups. This has not only fostered alumni engagement, but also provided an opportunity for staff to participate in these new programs.

Future Aspirations

As expressed below, the IDEAL plan represents our collective commitment to our future efforts to build upon the recent foundation of improving diversity, equity and inclusion in UO Advancement. Our core values of understanding the broader diversity of staff in our ranks remain pillars of our work. However,

we intend to bring to this effort a fundamental understanding of personal responsibility and collective aspiration to real change and impact. We intend to put in motion engagement activities, intentional decision making and shared values that can be measured, evaluated and improved upon. It is our goal to make this shared vision one of daily effort and on-going accomplishment that each of us can take great pride in being a part of.

GOAL #1 (I: Inclusion): Create an inclusive and welcoming environment for all

At its core, our Diversity Action Plan is intended to create change. Our goal is to implement this change in a respectful and inspiring way. Specifically, we want to improve the hearts and minds of every staff member in Advancement in a way that creates self-motivated interest to develop a deeper understanding, awareness, welcoming and inclusive working environment for every employee and see evidence of this welcoming and inclusive environment each and every day. This can only be achieved by developing and maintaining a culture of personal responsibility to improve in this area. Our Diversity Action Plan is our collective embrace of these core values.

Advancement Diversity Committee- Continued Effort

The Advancement Diversity Committee will continue to play an active role in listening, strategizing and shaping our efforts in creating a more inclusive and understanding environment. In addition to leading selective engagement activities, we intend to increase their interactions with the senior staff, the VP and the Talent Management Director to ensure better coordination between their efforts and investment/priority decisions. The VP will work with the Diversity Committee on an annual business planning process that will outline goals, expectations and programming for the up-coming year. Members of the committee will represent Advancement on university-wide committees or task forces and will share those activities with senior staff and the VP. Finally, the committee will continue to be open to all staff to join and membership will be encouraged regularly. The committee will provide monthly updates at the all staff meeting and continue to be an ear to all staff on issues, concerns and recommendations.

Assessment: The creation of a formal business plan and an annual summary/review of activities against that business plan will provide both a shared understanding and written record of the progress made by the committee toward overall Advancement Diversity Action Plan. This annual process will also not only allow but encourage the Diversity Action Plan to be a living plan with room for flexibility informed by activity successes or challenges.

Workshops, Lunch Conversations, and New Engagement Opportunities

The Advancement Diversity Committee, in continued collaboration with the Talent Management Director, will continue to develop, provide and facilitate ongoing and regular staff engagement opportunities to improve awareness, understanding and inclusion. Primarily drawing on resources from the university (but not limited to), these efforts are intended to bring certain perspectives, experiences

and voices to our entire team for better understanding. These efforts will be developed yearly in the Diversity Committee Annual Business Plan and requests for necessary funding and logistical support approved through the VP. Programming will be evaluated regularly for improvement as needed.

Assessment: As referenced above, the annual business plans and summary/reviews will document the list of activities and assess the effectiveness of the activities. On-going learning and review of the annual efforts will play a critical role in providing accountability, transparency and measurement of impact of these efforts.

Climate Surveys, Live Polling and Staff Input

Lead by the Director of Talent Management in consultation with the Diversity Committee, the senior staff and the VP, specific inquiries related to diversity, equity and inclusion will be incorporated in the broader over-arching surveys that are being used to foster improved team building, career/professional development, and better management efforts. The data collected will be done in a responsible way and will be consistent with peer best practices. The survey results will be shared with all staff in periodic and appropriate ways. It is the hope and intention the surveys will reflect an improvement in the collective sense of inclusiveness throughout the entire staff.

Assessment: With an annual commitment to participate in industry organized climate surveys as well as Advancement generated surveys, polling, etc.- we will have the ability to compare, analyze and be informed by changes in attitudes, understandings and awareness among the staff. This effort will most effectively bring data driven awareness to our Diversity Action Plan.

GOAL #2 (D: Diversity): Increase the representation of diverse students, faculty, staff, and community partners at all levels of the university.

Undergraduate Student Rotating Internships

After several years of experimentation, Advancement intends to formalize an annual undergraduate student internship program. The program will provide part-time work for the academic year with a competitive compensation. The goal of the internship will be to expose more students to a career in Advancement with a much-targeted intention to recruit students to the program from underrepresented student communities. To that end, the program will work with leadership across the university to identify and recruit students to this program. The internship will focus on junior and senior students with the goal of six interns per year. The internship will comprise of a minimum of 10 hours a week and will be administered in a rotation within Advancement to expose the students to various aspects of Advancement's functions. The interns will have access to senior management, including the VP within Advancement and potential across the university (as appropriate) for mentoring and career assistance. Advancement will partner with various university offices (Student Life, Equity and Inclusion, etc.,) to work in a coordinated way in reaching out to and encouraging students of unrepresented communities to participate in these internships. Additional and on-going planning for this program is

required and the first cohort of interns is targeted for fall 2017. The program will be run by the Director of Talent Management.

Assessment: Annual reflection and summary of the internships will be provided by both the students and program director. Additionally, the program director will document and track both the number of students, how were they identified and selected and, to the best of our ability, how many pursued career employment post-graduation in the Advancement related fields.

Graduate Student Embedded Internship

In coordination with academic programs like Nonprofit Management Program, a graduate student internship will be formalized and implemented. With a goal of two graduates per year, this internship will be developed in coordination with both the students' academic requirements and specific unit Advancement job functions. The internship is intended to be part time and fully embedded in an Advancement function for a specific time (no shorter than an academic quarter and up to a full academic year). By taking on the internship, the Advancement function leader agrees to develop authentic learning opportunities and valuable contributions by the intern to functional area. Advancement will partner with various university offices (Student Life, Equity and Inclusion, 3PM, etc.) to work in a coordinated way in reaching out to, and encouraging students of unrepresented communities to participate in these internships. Additional details and program development is ongoing with a target to roll out the program in fall of 2017. The program will be run by the Director of Talent Management.

Assessment: Annual reflection and summary of the internships will be provided by both the students and program director. Additionally, the program director will document and track both the numbers of students, how were they identified and selected and to the best of our ability how many pursued career employment post-graduation in the Advancement related fields.

Student Engagement Through Advancement Events

Over the past several years, the office of Donor Stewardship has increased the number of students who participate in various donor recognition events. From the Pioneer Awards Gala to the named scholarship recognition events, students are invited to meet with donors and volunteers as one of the core event objectives. In the coming years, we intend to increase these opportunities and in particular, recruit students from underrepresented communities to participate in these events. Advancement will need to partner with many campus departments to identify the appropriate students to engage in this effort. In doing so, we will provide additional opportunities for our students and donors to engage with each other for the purpose of mutual aspiration and appreciation. Further, details TBD.

Assessment: With final clarification on how this effort will be administered, the intent will be to measure the number of students participating annually, from which programs they represent, and how this effort increases our student engagement from underrepresented communities.

GOAL #3 (A: Achievement): Facilitate access to achievement, success, and recognition for underrepresented students, faculty, staff, and alumni

Targeted Recruitment of Staff from Underrepresented Communities

An expressed goal of the IDEAL plan is to build the ranks of underrepresented communities within our staff. Our primary effort to do so will be to improve the number of representative candidates in our respective search pools. In consultation with multiple campus departments (HR, GC, and OEI, among others) we intend to accomplish this in a variety of ways that will be led and implemented by our Talent Management Director. They include:

- More strategic advertising at the national level.
- Candidate pool building efforts through targeted outreach.
- Attendance at professional conferences targeting potential candidates.
- Maintaining a working pool of possible candidates.
- Participating in nationwide Talent Management Network for candidate sourcing.
- Engaging senior staff members in informational and recruitment meetings with key potential candidates.

Assessment: Lead by Talent Management and HR functions in Advancement and in consultation with appropriate campus departments, we intend to collect, measure and analyze data related to our hiring practices. Again, with consultation with appropriate campus departments, we will utilize the appropriately collected data to inform senior staff on trends, accomplishments and challenges as well as engage our hiring managers and search committees on progress toward this goal. Finally, in an appropriate way, we intend to share this data to all staff and across campus as part our goal to create an inclusive and welcoming environment in Advancement.

Continuing Training for Managers and Hiring Supervisors

Last fall we arranged for an implicit bias training for a broader group of managers. Many who participated found the session extremely valuable. It is with this in mind that we will look to expand these types of best practice training sessions for a larger number of our management staff. These trainings will be coordinated through the Advancement HR and Talent Management areas and will be evaluated for further refinement each year. We intend to quantify the number of staff who participate and the frequency of the training efforts.

In addition, we intend to expand our current on-boarding orientation process to include a section on our Diversity Action Plan. The Diversity Committee will be asked to partner with Talent Management to participate in the on-boarding process, both in developing content and engaging with new hires.

Assessment: Encourage training participants to evaluate each training session. Document the number of sessions and participants annually for the purpose of assessment and comparison. On-boarding/orientation efforts can be documented and shared across campus for best practice and improvements.

GOAL #4 (L: Leadership): Leadership will prioritize and incorporate diversity, equity and inclusion in plans and actions

It is essential that Advancement leadership be visible, consistent and reflective of the core values of the Diversity Action Plan. Starting with the Vice President and with active affirmation by the senior staff, the leadership team must affirm that the Diversity Action Plan and what it represents is of the highest priority and that every Advancement member will be expected to authentically participate in the collective effort.

Diversity Committee Annual Business Plan

As previously mentioned, the Advancement Diversity Committee will be invited to work with Advancement in concert with the Vice President and his/her designee on a business plan that highlights the implementation of key aspects of the IDEAL plan. Currently, all major units within Advancement produce an annual plan during the first quarter of the fiscal year that reflects the plans, aspirations and key functions for the year. These plans often include specific goals, activities and metrics that are measured during the annual performance review at the end of the year. The diversity business plan will defer in that it will not be a plan for the committee but a plan that's lead by the committee for all Advancement. It is intended that the plan will be shared with all staff and be a plan that will align with specific objectives outlined in the IDEAL plan. In short, the business plan will be an annual implementation of the broader IDEAL plan.

Assessment: Annually the VP (and other senior staff) will meet with the Diversity Committee to assess the previous year's annual business plan for review and summary of accomplishments. (Notes of this review discussion will be captured from the annual meeting.) This effort will produce a written record of not only the annual business plans but also the annual review of the year's efforts. TO BE CLEAR - THIS IS NOT AN ANNUAL REVIEW OF THE COMMITTEE, but instead a review of Advancement's annual Diversity Action Plan efforts by the Diversity Committee and the VP. This review process will provide invaluable measurement of progress toward the plan.

New Leadership Team Meeting, Broader Management Group and/or Future Leadership Type Groups

Beginning in the spring of 2017, a newly expanded leadership team was be created to facilitate discussions related to budget, management, strategic planning and general staff engagement. This new bi-weekly meeting includes the Director of Talent Management, who will impart participants with updates related to professional development and the Diversity Action Plan. From time to time this group will invite members of the Diversity Committee to join the group discussions related to progress with the Diversity Action Plan. In addition, the Broader Management Group and other future leadership groups will be invited to participate in similar engagement with the Diversity Plan efforts.

Assessment: Lead by Talent Management, periodic review of these groups' efforts to engage in aspects of the Diversity Action Plan will be provided. Additional scoping of this assessment is yet to be completed and will be done so in line with the development of these groups.

Vice President Annual Review – Self Report

Beginning in the spring of 2017, the Vice President will provide a specific assessment and review of the annual efforts of the Diversity Action Plan as part of the annual review process with the president. The specific Diversity Action Plan assessment will be shared with the diversity team, senior staff and the leadership team. The plan will available to all staff upon request. It is the intention of this step to provide a transparent and accountable report from the leader of Advancement to ensure that the Diversity Action Plan effort receives appropriate and important priority status of the overall Advancement effort.

Assessment: The effort is intended to provide transparency and hold leadership accountable for the success of the Diversity Action Plan. More importantly, it is the hope that this annual assessment will spark conversation and inspire commitment by all members of Advancement to participate individually in the Diversity Action Plan's collective effort to create a more inclusive and welcoming environment for all.