

2017-2020 UO Diversity Action Plan

Office of the Vice President for Finance and Administration (VPFA)

September 15, 2017

Executive Summary

The Office of the Vice President for Finance and Administration and Chief Financial Officer (VPFA/CFO) and its units provide key financial, facilities management, human resource, safety and administrative services to our campus. Finance and Administration includes a broad portfolio of administrative units that directly serve and support all aspects of campus life, from various financial service units, to campus planning and facilities management, to HR and other employee-focused units, as well as safety and risk services, which includes the police, and a number of administrative units.

The 2017-2020 diversity action planning process comes at an opportune time for the Finance and Administration portfolio. For us this plan is not a stand-alone initiative, but an opportunity to build upon two key efforts, one already underway and the other in its developmental stage. In 2014, the VPFA/CFO launched a diversity committee to work on how the Finance and Administration portfolio could improve inclusion, diversity, and cultural competency in its workforce, and the climate in its units. The diversity committee has researched, made recommendations, and helped the VPFA/CFO to launch a number of efforts toward this goal. The diversity committee's membership is broad, and includes staff from more than a dozen different units. In addition to the work of the diversity committee, the VPFA leadership council has recently begun long-range strategic planning for our division, the underlying vision of which has two objectives, one focused on improving the problem solving capabilities of our units and the other focused on recruiting, developing and retaining a diverse and highly competent workforce. Both of these objectives—and, as a result, the overall strategic planning effort-- will be strengthened by giving attention to the goals of the IDEAL Plan as we proceed.

Stakeholders and Developmental Process

The VPFA/CFO regularly engages a number of key stakeholder groups within the portfolio on issues related to diversity and inclusion. The process for development of this action plan included working with each of the following groups to develop proposals, projects and action steps that comprise the strategies and tactics serving the five goals of the IDEAL Plan:

- The *VPFA executive leadership team* comprised of the VPFA/CFO and the five associate/assistant vice presidents responsible for each major area in the portfolio: business affairs, campus planning and facilities management, safety and risk services, human resources, and administrative services);
- The *VPFA diversity committee*, a 15-member, cross-functional team representing 13 Finance and Administration units which meets monthly and is co-chaired by the VPFA/CFO and her chief of staff;
- The *VPFA leadership council* comprised of the VPFA/CFO, her executive leadership team and the 28 unit directors within Finance and Administration.

At three points during the action plan's initial development, the VPFA/CFO engaged the entire 550+-employee portfolio via email, inviting feedback, concerns and suggestions via email, phone and in-person as well as via an anonymous web-link. This communication serves a two-fold purpose: (1) to convey explicitly to all employees in the Finance and Administration portfolio that the VPFA/CFO and the division are committed to this work, and (2) to solicit feedback and input from the entire portfolio on this effort. We were pleased that some members of our staff took the time to make suggestions through these means and we found it valuable to offer a variety of ways for employees to share and respond. On March 1, 2017, 70 employees participated in an in-person opportunity for all VPFA staff to meet with the VPFA diversity committee to review the draft action plan and provide comment. Members of the diversity committee and unit leaders also engaged and collected feedback from colleagues in their units at standing staff meetings. The feedback collected has been incredibly helpful. We have incorporated some of the feedback directly into this plan and other comments and ideas are being used to inform how we deploy the various strategies and tactics.

The DEI-led administrative review committee's comments were reviewed and discussed at individual meetings of the (1) VPFA executive leadership team, (2) the VPFA diversity committee, and (3) the VPFA leadership council.

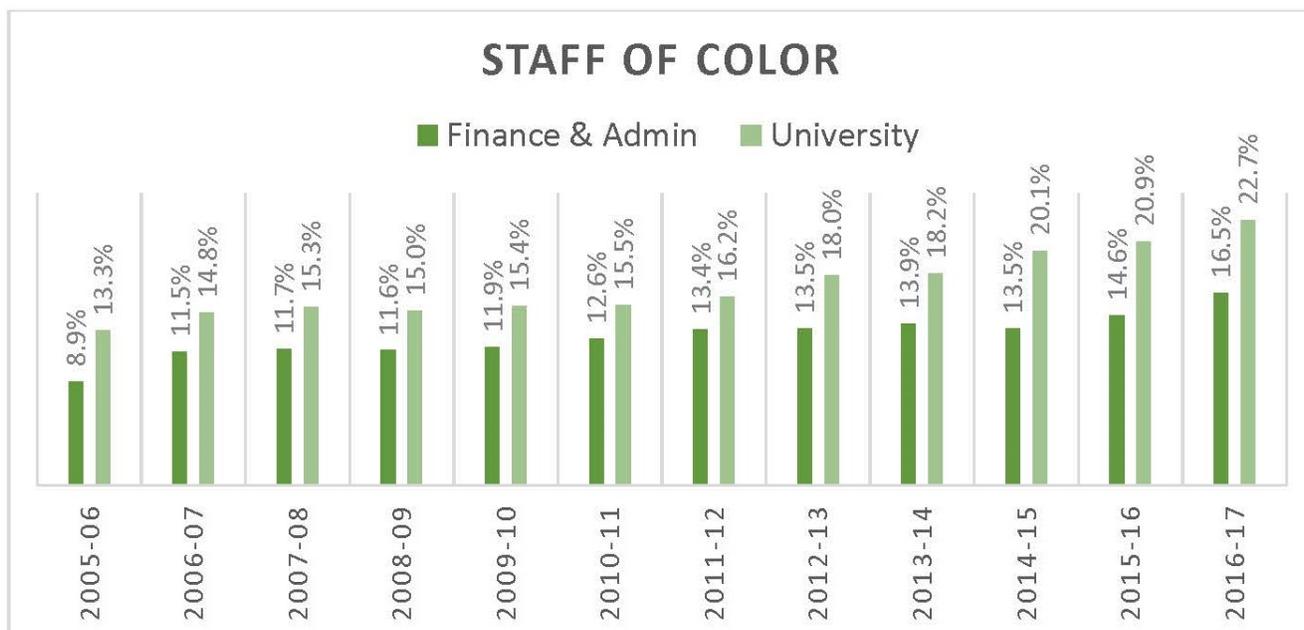
Feedback from the review committee and all three of these internal groups were collated and reviewed by the VPFA/CFO and her chief of staff, and incorporated into this subsequent version of the plan (dated September 15, 2017).

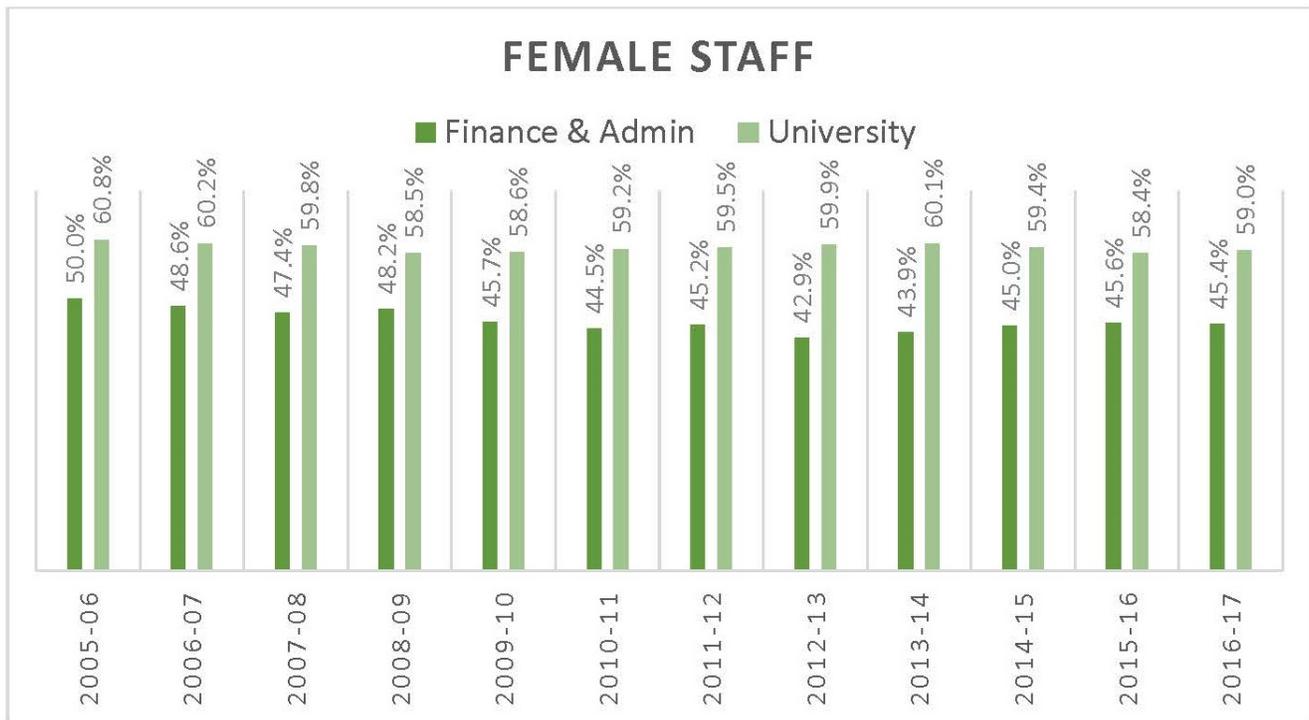
Demographic Context

The VPFA portfolio is comprised of more than 550 employees, including the vice president, officers of administration, and classified staff.

Although representation of females and people of color is lower in Finance and Administration than in the broader UO population, it is worth noting that, according to longitudinal data provided by the Office of Institutional Research, staff of color in Finance and Administration has increased over the last 12 years from 8.9% to 16.5%.

While the percentage of female staff across the university has hovered around 60% for the last 12 years, female staff in Finance and Administration has been 10-15% lower over that same period. The portfolio experienced a 7% decline over an eight-year period (from 2005-06 to 2012-13) but has seen an upturn with female representation in Finance and Administration climbing back up slowly (at an average rate of 0.6% per year), reaching 45.4% this year. The workforce demographics in our portfolio traditionally differ from those found in most areas of the university. For example, the Finance and Administration division includes units such as facilities services, utilities and energy, and the police, in which employees are more traditionally male. Initial data analysis shows that, as campus has grown, the staff size of these units, which provide key infrastructural support to the campus, has grown at a faster rate than that of the Finance and Administration portfolio overall, which appears to have remained fairly stable.





Summary of Key Tactics

Here are descriptions of the tactics we plan to employ, which are also listed in the tables that follow. A number of the tactics we have devised serve *multiple goals* of the IDEAL Plan. See also the “Tactics IDEAL Grid” in the appendix:

- *Finance and Administration student pipeline internship program.* We are designing a program through which a cohort of students (5-8 for the pilot year; hopefully 8-12 students in future years) will gain exposure to up to three units within Finance and Administration through a credit-bearing project-based internship over the course of an academic year. The program will be open to all undergraduate and graduate students with focused recruitment through diversity-based student groups/clubs/associations. The program will include opportunities for interns to network with each other and with employees and leaders throughout Finance and Administration.
- *Implicit bias training.* All Finance and Administration directors have received implicit bias training and campus-wide implicit bias training opportunities have been shared with staff in all units in the portfolio. Going forward, we will identify ways to provide greater opportunity for more staff in our portfolio to participate, with particular attention to those who supervise and those who serve on search committees.
- *Employee training and on-boarding research* by the diversity committee. Members of the diversity committee will identify potential training opportunities, and then make recommendations to the VPFA/CFO for specific trainings to be accessed by all staff across the portfolio along with recommendations for how to deploy the trainings. They will also identify best practices and propose an inclusion-focused on-boarding program for the portfolio.
- *Exit survey and exit interview.* Beginning in February 2017, all employees who separate from a position in the Finance and Administration portfolio are sent an online exit questionnaire and are invited to participate in an in-person or telephone exit interview. Data to be collected include influences on decision to leave and supervisor effectiveness (e.g., treating employees equitably, building community, promoting equity and inclusion, promoting career progression, etc.).
- *Finance and Administration leadership development program.* We will develop and pilot a cohort-based yearlong program for employees with the potential to—within the next ten years-- step into more significant leadership roles. Cohort members will receive a variety of leadership training including on such topics as cultural

biases, cultural competence, belonging and assimilation dynamics in the workplace, get exposure to potential career paths, network with central university leadership, and use their skills to work in teams to tackle real-world problems. We intend to recruit a high-performing, diverse group of employees to participate in this program.

- *Monthly networking sessions.* A sequence of monthly networking sessions was piloted in spring 2017 with the purpose of providing new Finance and Administration employees with the opportunity to network with each other and with more experienced employees from across the portfolio. The intent was to enhance inclusion-focused engagement opportunities such as sharing perspectives, finding commonalities/affinities, informal coaching/mentoring, identifying new areas of professional interest for potential career progression, etc. This may be launched in an ongoing way pending recommendations from the team that led the pilot.
- *Supervisor skill development cohort.* We piloted a six-month program for a cohort of 12 supervisors within Finance and Administration in which each participant completed a self-assessment and then worked through a curriculum to build the skills necessary to successfully communicate with, lead, and build an inclusive community among their direct reports. The program included significant cohort and team-building activities, and engagement around the following topics, to which principles of equity and inclusion are central: communication; delegation; building trust and teamwork; coaching and fostering a sense of belonging; and confronting difficult behavior.
- *Monthly employee spotlight.* A biographical spotlight on an employee within Finance and Administration that highlights employee excellence in its various forms. The spotlight may feature the employee's contributions to such things as team-building, customer service, and/or diversity and inclusion. The spotlight will be featured on various websites within the portfolio. A different employee will be spotlighted monthly. The intent is to give recognition to valued employees, highlight their strengths and uniqueness, and provide inspiration to, and promote a sense of community among, employees and prospective employees who share things in common with the individual being featured. The spotlight will also help to convey our portfolio-wide dedication to diversity and inclusion in the workplace.
- *Various initiatives and activities undertaken by Human Resources (HR),* many of which are aimed at Goal #1, to create an inclusive and welcoming environment for all employees, and at preparing the HR staff to better support and serve a diverse employee population. While nearly all of the HR-specific tactics cited below address more than two goals and, in some cases, both strategies under a particular goal, we have listed each of these tactics just once.
- *Applicant pool enhancement research and pilot.* Identify ways to expand qualified applicant pools during employment searches. A subset of the VPFA diversity committee will research and propose a pilot project for how to expand applicant pools such as through targeted recruitment and outreach, and/or other promising means.
- *VPFA staff visits.* Over the course of the next year the VPFA/CFO will visit every unit at least once in order to meet with small groups of employees to build rapport, exchange information about diversity efforts and opportunities, share her strategic vision, and listen to staff ideas and concerns.
- *Five-year comprehensive performance review* of associate/assistant vice presidents in Finance and Administration. The review will include factors related to the promotion of equity and inclusion principles and practices.
- *Equity and inclusion professional development fund.* Determine a plan for spending a modest pool of VPFA held professional development funds earmarked for opportunities related to advancing the work of diversity, equity, and inclusion.
- *Expanded diversity committee engagement.* Use the VPFA diversity committee as a means of providing member-employees with opportunities for meaningful engagement and momentum, as well as recognition of service on the committee. We will develop and initiate term limits to ensure broad representation and access to the committee, as well as diversity of ideas and contributions. We will work with members of the VPFA executive team and leadership council to ensure that the work of the diversity committee is shared regularly with leaders and staff within the portfolio, including at leadership council meetings.

- *Finance and Administration all-staff climate survey.* This effort is pending the work of the DEI cross-unit committee focused on a climate survey. Our ideal climate survey would ask employees to assess their supervisor's effectiveness (e.g., treating employees equitably, building community, promoting equity and inclusion, promoting career progression, etc.), departmental climate, access to decision makers, and level of confidence in divisional leadership.

Lessons Learned and Recommendations for University-Wide Diversity Initiatives

As we collected feedback on the earlier version of this plan, questions were raised about the viability of getting all of our initiatives off the ground simultaneously or nearly so. As a result, we revisited how the various initiatives intersect, in terms of the time and resources it will take to effectively plan, pilot and/or implement, and then evaluate each one. For example, our student pipeline internship program and the employee leadership program are both very high priorities, but both will require significant project management. We have had to prioritize one over the other to ensure each gets the attention it warrants given limitations in staffing capacity. We created a table (see Appendix II) that visually and simply lays out the anticipated timelines for each of the initiatives.

Given that DEI has signaled it will facilitate a cross-unit committee to focus on the development of a campus-wide climate survey, we removed the Finance and Administration all-staff climate survey from our list of initiatives. Our ideal climate survey would ask employees to assess their supervisor's effectiveness (e.g., treating employees equitably, building community, promoting equity and inclusion, promoting career progression, etc.), departmental climate, access to decision makers, and level of confidence in divisional leadership. Rather than various administrative and academic units putting together their own climate surveys, a university-wide climate survey to inform our diversity action plans would be more efficient, would contribute to the reduction of real and perceived "silos", and would increase impact of the data, particularly if the same survey was re-administered at routine intervals for longitudinal study.

Throughout the DAP development process, we have had the opportunity to collect suggestions for how we— as a university community— can move forward. The following is a list of ideas for the Division of Equity and Inclusion, and other leaders and decision-makers, to consider:

- Given that the reduction of implicit bias is a stated strategy for all of campus (see Goal 1, Strategy #2), it would be helpful to have a central effort dedicated to broadening our pool of qualified trainers on campus. Perhaps DEI could engage Erik Girvan, our resident expert in this field, in some train-the-trainer sessions and also host regularly hosting university-wide trainings all year long that employees could attend.
- *Around the O (ATO)*, which now has a well-established readership and routine dissemination plan, could be used by DEI and other portfolios as a regularized platform for communicating to students and employees about issues of diversity and inclusion. For example, there could be a regular weekly or monthly feature in the *ATO* distribution that provides a snippet of useful training, highlights a brief training video or article, or offers a scenario to ponder and which always includes a "call to action" relevant to all community members. These could be tailored for the student-focused version and for the employee "workplace" distribution.
- VPFA employees would like to see university-wide initiatives that actively facilitate opportunities for units and individuals to collaborate with each other across programmatic divisions (academic, administrative, research, auxiliary, etc.). Consider a diversity-centric version of [the Financial Stewardship Institute](#), where employees from across campus come together for a series of trainings and then work in teams, in a way as consultants, to research and make recommendations for addressing a gap or issue faced by our campus.
- HR's training website could be used by DEI and other units that offer diversity and inclusion-centered trainings and educational events to ensure broader access by employees. The training website is designed with functions related to RSVP and participant tracking, and may be useful for employees who wish to document their participation as a professional development. We have also received feedback indicating that the events hosted by DEI are interesting to our employees, but the time of day that events are offered are not always employee-friendly. Possible solutions: Offer the same event multiple times, schedule events at varied times, and/or offer live-feed so folks can listen/watch while working or from home.
- There is a perception among employees that the university's inclusion work and support of underrepresented groups does not extend beyond women and people of color. Our staff asked for more promotion of and a safe space for discussion of disability/ADA needs on campus, religion, political party, income disparity/social stratification, and other dynamics that make our community diverse.

Goals, Strategies and Tactics in the VPFA Portfolio

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

Strategy 1 – Create a more welcoming, respectful and inclusive climate for all.

Tactics	Target measures of success	Resources to be used for this tactic	Name and title of lead personnel	Timeline
1.1.1 Exit survey and exit interviews (see description in executive summary)	-# of employees participating in survey and exit interviews -% of employees separating who participate in survey and exit interviews	Qualtrics survey software; HR employee separation data	Kassy Fisher, Asst. VP for Administration and Chief of Staff	The exit survey was developed in 2016 and launched February 2017. It is now ongoing.
1.1.2 VPFA staff visits (see description in executive summary)	-# of departmental meetings conducted in 12-month period	VPFA/CFO and chief of staff will develop materials for sharing.	Jamie Moffitt, VPFA/CFO	The first round of visits will begin in spring 2017 and are expected to be completed by the end of fall 2017. If successful, this will be repeated annually.
1.1.3 Visible HR presence and engagement through training at HR all hands (all staff) meetings on such topics as LGBTQIA+ awareness, race relations, and how to be an ally; through presentations on disability/ADA at HR Partners meetings; through direct correspondence with employees with visa status and with all employees through the "respectful workplace" memo; and through HR staff presence at diversity-centered campus events. (HR-led campus wide effort)	-# of inclusion- focused trainings and presenters at HR unit-wide "all hands" meetings and at HR Partners meetings per year -# of campus diversity events promoted to HR staff through all hands meetings, and the HR internal newsletter -# of HR staff who attend campus diversity events -# of campus diversity events attended by HR staff members	Campus and community experts on various inclusion topics (i.e., from Student Life, Disability Services, Affirmative Action, Mobility International USA, etc.); HR staff	Nancy Resnick, Assoc. VP and Chief HR Officer (CHRO)	Already underway, these opportunities will be added to and repeated at intervals.
Describe the evaluation tool that you will utilize to measure progress and ensure accountability.				
We will track the metrics listed above for each initiative. These will require analysis of survey responses, event-specific participation tracking, and annual summary reviews.				

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

Strategy 2 – Incorporate promising practices that eliminate implicit bias and combat racism as well as other forms of discrimination. Incorporate promising practices to increase equity, inclusion and inter- cultural understanding in onboarding, performance evaluations, tenure and promotion, and other unit processes and policies in ways that allow all members of the unit to thrive and succeed.

Tactics	Target measures of success	Resources to be used for this tactic	Name and title of lead personnel	Timeline
1.2.1 Implicit bias training (see description in executive summary)	-# of representatives with implicit bias training experience serving on search committees for VPFA positions	Harvard IAT; Erik Girvan or others with implicit bias training expertise; VPFA diversity committee members	Kassy Fisher, Asst. VP for Administration and Chief of Staff	In FY 2018, we will have identified mechanisms for tracking staff participation in implicit bias training and identifying those who serve on search committees and who supervise that have not participated in the training. We will also identify in-person training opportunities in FY 2018,
1.2.2 Five-year comprehensive performance reviews (see description in executive summary)	-# of five year reviews completed per year that successfully evaluate promotion of equity and inclusion principles and practices. -% of review-eligible AVPs that receive a review.	Student Life's templates for process and documentation; VPFA leadership council members to chair review committees; relevant online resources provided by DEI and HR	Kassy Fisher, Asst. VP for Administration and Chief of Staff	In September 2017, a draft schedule will be developed. An implementation plan will be developed in fall 2017, with the first review to take place between January-May 2018.
1.2.3 Supervisor skill development cohort (see description in executive summary)	-# of supervisors that participate in training -# of trainings offered through the program -Results of pre/post self-assessment -Over time: changes in how respondents rate their supervisors in the exit survey	Strategic Doing strategies and facilitation; members of the VPFA leadership council.	Kaia Rogers, Director of Programs and Services, HR, for the pilot	Pilot cohort took place April-September 2017. Recommendations for developing the program on an ongoing basis will be made in Fall 2017.

1.2.4 Employee training and onboarding research and recommendations to the VPFA/CFO (see description in executive summary)	<ul style="list-style-type: none"> -# of identified trainings -# of employees participating in identified trainings -Successful development and deployment of diversity and inclusion onboarding materials 	UO events calendars and <i>Around the O</i> ; relevant online resources provided by DEI and HR will be referred to.	Kassy Fisher, Asst. VP for Administration and Chief of Staff	This will be a diversity committee focus in FY 2018, with individual trainings or training series recommended to the VPFA/CFO, with proposals for implementation no later than FY 2019.
1.2.5 HR to incorporate feedback from DEI to ensure that all available OA performance evaluation templates incorporate diversity and inclusion measures. (HR-led campus wide effort)	<ul style="list-style-type: none"> -# of OA performance evaluations using the new templates - # of OA employees evaluated using diversity and inclusion as a metric 	HR and DEI staff.	Annie Bentz, Employee and Labor Relations, HR	Language has been added to OA performance evaluation forms.
1.2.6 HR's new approach to designing employee recognition events in a way that breaks down silos, including those that arise from social class and economic status. We will evaluate how to build in capacity for this, and will look at streamlining the reporting mechanism and consider designing a feedback mechanism such as a follow-up survey for participants.	<ul style="list-style-type: none"> -# of recognition events per year -# of invitees attending each event that represent different employee groups (i.e., OAs, classified staff, faculty, and administrators) -# of honorees invited to at each event from different employee groups -Direct, positive feedback from impacted employees 	HR staff	Kaia Rogers, Director of HR Programs, and Sandee Bybee, HR Engagement and Communications Manager	Already underway. The first of these events have taken place in December 2016 and February 2017.

Describe the evaluation tool that you will utilize to measure progress and ensure accountability.

We will track the metrics listed above for each initiative. These will require analysis of survey responses, event-specific participation tracking, and annual summary reviews.

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

Strategy 1 – Incorporate active recruitment strategies, processes to eliminate conscious and unconscious bias, and other promising practices to recruit diverse staff, faculty, administrators, undergraduate, and graduate students from traditionally under-represented communities.

Tactics	Target measures of success	Resources to be used for this tactic	Name/title of lead personnel	Timeline
2.1.1 Applicant pool enhancement research and pilot (see description in executive summary)	-# of new tools or processes implemented within first year of project, and within each subsequent year -Metrics that show change in levels of diversity in applicant pools	Members of the VPFA diversity committee; Strategic Doing strategies and facilitator; resources developed by DEI and the Office of the Provost and Academic Affairs.	Kassy Fisher, Asst. VP for Administration and Chief of Staff	The committee will engage in research and the development of at least one pilot project prior to the end of FY 2019, with initial implementation in FY 2020.
2.1.2 Implicit bias training (see description in executive summary)	-# of representatives with implicit bias training experience serving on search committees for VPFA positions	Harvard IAT; Erik Girvan or others with IB training expertise; VPFA diversity committee members for coordination, recruitment of peers; VPFA leadership council for implementation.	Kassy Fisher, Asst. VP for Administration and Chief of Staff	In FY 2018, we will have identified mechanisms for tracking staff participation in implicit bias training and identifying those who serve on search committees and who supervise that have not participated in the training. We will also identify in-person training opportunities in FY 2018, and roll out additional opportunities in FY 2019-2020.

<p>2.1.3 VPFA student pipeline internship program (see description in executive summary)</p>	<p>-# of students participating in the program -# of students from under-represented populations (URM) participating in the program -# of students who participate in the program who gain employment at the UO and, specifically, within VPFA portfolio</p>	<p>Members of the VPFA executive team and VPFA office staff. The Career Center, Office of the Dean of Students, and select academic programs will be consulted.</p>	<p>Jamie Moffitt, VPFA/CFO, and Daphne Joubran, Executive Assistant to the VPFA/CFO</p>	<p>The program will be developed in 2019 with the pilot cohort to be recruited for the Fall 2020 academic term.</p>
<p>2.1.4 HR will redesign language in position descriptions to include cultural competence as a core competency for all employees and vacancy announcements to identify a criterion of demonstrated, measurable commitment to diversity. This involves: training recruitment team to include this focus in their consultation in connection with searches; creating standard template language; and incorporating this into existing training (HR-led campus wide effort)</p>	<p>-New language to be included in PD. -New language will be included in vacancy announcements</p>	<p>HR staff, specifically on the Talent Acquisition team; other universities and units within UO that have successfully done this.</p>	<p>Nancy Nieraeth, Director of Talent Acquisition, Human Resources</p>	<p>These activities will take place in phases, beginning in early FY 2019.</p>
<p>Describe the evaluation tool that you will utilize to measure progress and ensure accountability.</p>				
<p>We will track the metrics listed above for each initiative. These will require analysis of survey responses, event-specific participation tracking, and annual summary reviews.</p>				

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

Strategy 2 – Use promising practices and effective strategies to retain diverse staff, faculty, administrators, undergraduate, and graduate students from traditionally under-represented communities.

Tactics	Target measures of success	Resources to be used for this tactic	Name/title of lead personnel	Timeline
2.2.1 Exit survey and exit interview (see description in executive summary)	<ul style="list-style-type: none"> -# of employees participating in survey and exit interviews -% of employees separating who participate in survey and exit interviews 	Qualtrics survey software; HR employee separation data	Kassy Fisher, Asst. VP for Administration and Chief of Staff	The exit survey was developed in 2016 and launched February 2017. It is now ongoing.
2.2.2 VPFA leadership development program (see description in executive summary)	<ul style="list-style-type: none"> -# of employees participating in program -Over time: # of participants who are promoted 	The VPFA/CFO and some members of the VPFA leadership council will develop the program; university leaders will be engaged for networking.	Andre LeDuc, Associate Vice President and Chief Resilience Officer	The program will be developed in FY 2018 with the pilot cohort to be recruited for FY 2019. The experience of the nearer-term supervisor skill development cohort will inform this program.
2.2.3 Monthly networking sessions (see description in executive summary)	<ul style="list-style-type: none"> - Ratio of new and current employees at each event -# of cross-unit collaborations among employees -Over time: # of promotions -Attendee survey feedback 	Seven members of the VPFA leadership council have developed the program and are committed to hosting the sessions, recruiting participants, and evaluating the program	Krista Dillon, Director of Operations, Safety and Risk Services; Sonia Potter, Director of HR Operations, Human Resources, for pilot	Networking sessions were piloted in February and March 2017. The pilot program will be evaluated in fall 2018, with possible recommendations for how to launch in an ongoing capacity.

<p>2.2.4 HR international employment specialist's collaboration and engagement in support of international employees</p> <p>(HR-led campus wide effort)</p>	<p>-# of attendees at forums and meetings specific to immigration law and enforcement, international hiring, etc. -Over time: % of UO employees in visa status</p>	<p>HR staff, colleagues in the Office of International Affairs</p>	<p>Nancy Nieraeth, Director of Talent Acquisition, and Jennifer Doreen, HR International Employment Specialist</p>	<p>Provided panelist for 3 campus-wide community forums on immigration changes, created communications for immigration updates to international employees, in spring 2017. Also serving on DREAMers group providing support for undocumented community members. Several projects actively in development with campus partners with intended completion in FY2018.</p>
<p>Describe the evaluation tool that you will utilize to measure progress and ensure accountability.</p>				
<p>We will track the metrics listed above for each initiative. These will require analysis of survey responses, event-specific participation tracking, and annual summary reviews.</p>				

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

Strategy 1 – Eradicate any existing gaps in achievement between majority and under-represented students, faculty and staff in graduation rates, tenure and promotion, professional opportunities, leadership opportunities and recognition.

Tactics	Target measures of success	Resources to be used for this tactic	Name and title of lead personnel	Timeline
3.1.1 Monthly employee spotlight (see description in executive summary)	-# of employees spotlighted in one year -# of places (e.g., websites, newsletters) that employee spotlights appear -# of web hits per spotlight and in total	Various websites within the portfolio, all internally-facing newsletters in the portfolio; staff time to recruit, select, interview write and post spotlights. Five members of the VPFA leadership council make up the team on this effort.	Tony Hardenbrook, Director of Utilities and Energy, Campus Planning and Facilities Management, for pilot	This program was piloted in Campus Planning and Facilities Management in spring 2017, and recommendations were made to the VPFA/CFO in summer 2018 for how to launch portfolio-wide. A VPFA-wide program will begin in FY 2018.
3.1.2 VPFA leadership development program (see description in executive summary)	-# of employees participating in program -Over time: # of participants who are promoted	The VPFA/CFO and some members of the VPFA leadership council will develop the program; university leaders will be engaged for networking.	Andre Le Duc, Associate Vice President and Chief Resilience Officer	The program will be developed in FY 2018 with the pilot cohort to be recruited for FY 2019. The experience of the nearer-term supervisor skill development cohort will inform this program.

<p>3.1.3 VPFA student internship program (see description in executive summary)</p>	<p>-# of students participating in the program -# of URM students participating in the program -# of students who participate in the program who gain employment at the UO and, specifically, within VPFA portfolio</p>	<p>Members of the VPFA executive team and VPFA office staff. The Career Center, Office of the Dean of Students, and select academic programs will be consulted.</p>	<p>Jamie Moffitt, VPFA/CFO, and Daphne Joubran, Executive Assistant to the VPFA/CFO</p>	<p>The program will be developed in 2019 with the pilot cohort to be recruited for the Fall 2020 academic term.</p>
<p>3.1.4 HR staff engagement in support of employees who identify as LGBTQIA+. For example, resources for employees and supervisors in the areas of gender transition and impact in the workplace and on healthcare benefits. HR participation in campus committees (e.g., Sexual Orientation, Attraction, Gender Identity and Expression)</p> <p>(HR-led campus wide effort)</p>	<p>-# of trainings HR staff members receive and put to use -Presence of resources for LGBTQIA+ and gender transition on HR website</p>	<p>HR's national professional organization, Society for Human Resource Management (SHRM), campus contacts and experts, HR staff</p>	<p>Nancy Resnick, Assoc. VP and CHRO Kaia Rogers, Director HR Programs and Services</p>	<p>SHRM training to be completed in February 2017, with additional activities to follow based on the training received.</p>

Describe the evaluation tool that you will utilize to measure progress and ensure accountability.

We will track the metrics listed above for each initiative. These will require analysis of survey responses, event-specific participation tracking, and annual summary reviews.

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

Strategy 2 – Increase faculty, student, staff, and alumni participation (with special focus on groups that are currently under-represented) in global leadership experiences, research, professional development opportunities, and scholarships (e.g. Rhodes Scholar and Marshall Scholar competitions) as well as other prestigious awards and recognitions.

Tactics	Target measures of success	Resources to be used for this tactic	Name and title of lead personnel	Timeline
3.2.1 Monthly employee spotlight (see description in executive summary)	-# of employees spotlighted in one year -# of places (e.g., websites, newsletters) that employee spotlights appear -# of web hits per spotlight and in total	Various websites within the portfolio, all internally-facing newsletters in the portfolio; staff time to recruit, select, interview write and post spotlights. Five members of the VPFA leadership council make up the team on this effort.	Tony Hardenbrook, Director of Utilities and Energy, Campus Planning and Facilities Management, for pilot	This program was piloted in Campus Planning and Facilities Management in spring 2017, and recommendations were made to the VPFA/CFO in summer 2018 for how to launch portfolio-wide. A VPFA-wide program will begin in FY 2018.
3.2.2 VPFA student pipeline internship program (see description in executive summary)	-# of students participating in the program -# of URM participating in the program -# of students who participate in the program who gain employment at the UO and, specifically, within VPFA portfolio	Members of the VPFA executive team and VPFA office staff. The Career Center, Office of the Dean of Students, and select academic programs will be consulted.	Jamie Moffitt, VPFA/CFO, and Daphne Joubran, Executive Assistant to the VPFA/CFO	The program will be developed in FY 2019 with the pilot cohort to be recruited for the Fall 2020 academic term.

<p>3.2.3 Monthly networking sessions (see description in executive summary)</p>	<p>-# of employees who attend -# of cross-unit collaborations among employees -Over time: # of promotions -Attendee survey feedback</p>	<p>Seven members of the VPFA leadership council have developed the program and are committed to hosting the sessions, recruiting participants, and evaluating the program</p>	<p>Krista Dillon, Director of Operations, Safety and Risk Services; Sonia Potter, Director of HR Operations, Human Resources, for pilot</p>	<p>Networking sessions were piloted in February and March 2017. The pilot program will be evaluated in fall 2018, with possible recommendations for how to launch in an ongoing capacity.</p>
<p>3.2.4 HR panelists participate in UO sponsored panel activities hosted by Mobility International USA's (MIUSA) international welcome for participants around the globe; HR engagement in UO's disability studies (academic minor) executive board; HR participation in Disability Forum annual event; HR's increased participation in the Disability I Advisory Council (DIAC), a university committee related to disability resources and awareness (HR-led campus wide effort)</p>	<p>-# of employees who serve as panelists in MIUSA international events -Successful launch of, and # of students recruited to earn, the disability studies undergraduate minor</p>	<p>HR and Affirmative Action office staff, including Martin Stanberry, Equal Opportunity Specialist (ADA coordinator)</p>	<p>Nancy Resnick, Assoc. VP and CHRO, and Martin Stanberry, Equal Opportunity Specialist, Office of Affirmative Action</p>	<p>Periodic and ongoing. HR's first participation took place at the annual conference in May 2016. These will take place annually thereafter</p>

Describe the evaluation tool that you will utilize to measure progress and ensure accountability.

We will track the metrics listed above for each initiative. These will require analysis of survey responses, event-specific participation tracking, and annual summary reviews.

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

Strategy 1 – Develop and promote programs that support, mentor and prepare members of under-represented groups for leadership opportunities (i.e. department heads, directorships, deanships, vice presidencies, etc.) at the UO.

Tactics	Target measures of success	Resources to be used for this tactic	Name and title of lead personnel	Timeline
4.1.1 VPFA student pipeline internship program (see description in executive summary)	-# of students participating in the program -# of URM students in the program -# of students who participate in the program who gain employment at the UO and, specifically, within VPFA portfolio	Members of the VPFA executive team and VPFA office staff. The Career Center, Office of the Dean of Students, and select academic programs will be consulted.	Jamie Moffitt, VPFA/CFO, and Daphne Joubran, Executive Assistant to the VPFA/CFO	The program will be developed in 2019 with the pilot cohort to be recruited for the Fall 2020 academic term.
4.1.2 VPFA leadership development program (see description in executive summary)	-# of employees participating in program -Over time: # of participants who are promoted	The VPFA/CFO and some members of the VPFA leadership council will develop the program; university leaders will be engaged for networking	Andre Le Duc, Associate Vice President and Chief Resilience Officer	The program will be developed in FY 2018 with the pilot cohort to be recruited for FY 2019. The experience of the nearer-term supervisor skill development cohort will inform this program.
4.1.3 Supervisor skill development cohort (see description in executive summary)	-# of supervisors that participate in training -# of trainings offered through the program -Results of pre/post self-assessment -Over time: changes in how respondents rate their supervisors in the exit survey	Strategic Doing strategies and facilitation; members of the VPFA leadership council.	Kaia Rogers, Director of Programs and Services, HR, for the pilot	Pilot cohort took place April-September 2017. Recommendations for developing the program on an ongoing basis will be made in Fall 2017.

Describe the evaluation tool that you will utilize to measure progress and ensure accountability.

We will track the metrics listed above for each initiative. These will require analysis of survey responses, event-specific participation tracking, and annual summary reviews.

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

Strategy 2 – Utilize philanthropy and other resources to advance the work of diversity, equity, and inclusion in your unit and across the University.

Tactics	Target measures of success	Resources to be used for this tactic	Name and title of lead personnel	Timeline
<p>4.2.1 Expanded diversity committee participation and increased dissemination of the committee's work into the activities of the VPFA leadership council and VPFA units (see description in executive summary)</p>	<p>-# of units represented on the committee each year -Participation rate of members (e.g., through attendance at meetings, engagement in initiatives) -# of employees serving on the committee and requesting to serve on the committee -# of VPFA leadership council meetings per year in which diversity and inclusion is a focus.</p>		<p>Kassy Fisher, Asst. VP for Administration and Chief of Staff</p>	<p>The diversity committee membership is reviewed at the start of each academic year to ensure that there is good representation from across the portfolio. Vacancies are filled with attention to having representation across gender and race/ethnicity. By December 2017, the committee will decide upon term limits for membership and document member obligations/expectations.</p>
<p>4.2.2 Equity and inclusion professional development fund (see description in executive summary)</p>	<p>-# of requests and # of funded requests -# of ideas/opportunities that yield new practices, increased recruitment and retention of diverse employees, improved climate</p>	<p>Funds held in the Office of the VPFA; VPFA diversity committee, executive leadership team will work on design and implementation. Relevant online resources provided by DEI and HR will be referred to;</p>		<p>By March 2018, a program will be developed through which employees or departments can apply for professional development funds to host or put on a training, attend a training, act on an approved proposal, etc. Implementation plan will include a vetting/decision making process as well as any obligations after the fact (e.g., write a report, offer a training based on what is learned).</p>

<p>4.2.3 Employee training and on-boarding research and recommendations to the VPFA/CFO (see description in executive summary)</p>	<p>-# of identified trainings -# of employees participating in identified trainings -Successful development and deployment of diversity and inclusion onboarding materials</p>	<p>UO events calendars and <i>Around the O</i>; relevant online resources provided by DEI and HR will be referred to.</p>	<p>Kassy Fisher, Asst. VP for Administration and Chief of Staff</p>	<p>This will be a diversity committee focus in FY 2018, with individual trainings or training series recommended to the VPFA/CFO, with proposals for implementation no later than FY 2019.</p>
<p>Describe the evaluation tool that you will utilize to measure progress and ensure accountability.</p>				
<p>We will track the metrics listed above for each initiative. These will require analysis of survey responses, event-specific participation tracking, and annual summary reviews.</p>				

APPENDIX I: FINANCE AND ADMINISTRATION TACTICS IDEAL GRID

Tactic	Inclusion	Diversity	Evaluation	Achievement	Leadership
Diversity Committee-Led/Focused					
Finance and Administration employee exit survey and exit interview	●	●	●		
Implicit bias training	●	●	●		
Applicant pool enhancement research and pilot program		●	●		
Employee training and on-boarding research	●		●		
VPFA diversity committee engagement			●		●
Finance and Administration all-staff climate survey	●	●	●		
VPFA-Initiated					
Finance and Administration student pipeline internship program		●	●	●	●
Finance and Administration leadership development program		●	●	●	●
VPFA staff visits	●		●		
Five-year comprehensive performance review	●		●		
Equity and inclusion professional development fund			●		●

Leadership Council-Initiated				
Monthly employee spotlight			●	●
Monthly networking sessions		●	●	●
Supervisor skill development cohort	●		●	●
HR-Led				
Greater HR staff visibility, presence and engagement on equity and inclusion issues (campus wide)	●		●	●
Enhanced OA performance evaluations (campus wide)	●		●	
More inclusive employee recognition practices (campus wide)	●	●	●	
Make cultural competence a core competency for employees (campus wide)		●	●	
More visible support for international employees (campus wide)	●	●	●	
Enhanced support for transgender and LGBTQIA+ employees and prospective employees (campus wide)	●	●	●	
Enhanced HR engagement in disability issues (campus wide)	●	●	●	●

APPENDIX II: FINANCE AND ADMINISTRATION TACTICS ACTIVITY TIMELINE

KEY: Planning- 1; Initial implementation- 2; Continue pending success of initial implementation- 3; Underway/ongoing- 4

Tactic	FY 2017	FY 2018	FY 2019	FY 2020
Finance and Administration employee exit survey and exit interview	1 2	4	4	4
Implicit bias training		1 2	3	
Applicant pool enhancement research and pilot program			1	2 3
Employee training and onboarding research		1	2	3
Expanded VPFA diversity committee engagement (set term limits, increase engagement of leadership)	4	4	4	4
Finance and Administration student pipeline internship program			1	2 3
Finance and Administration leadership development program		1	2	3
VPFA staff visits	4	4	4	4
Five-year comprehensive performance review		1 2	4	4
Equity and inclusion professional development fund		1	2 3	

Monthly employee spotlight	1 2	4	4	4
Monthly networking sessions	1 2	3		
Supervisor skill development cohort	1 2	3		
Greater HR staff visibility, presence and engagement on equity and inclusion issues (campus wide)	1 2	4	4	4
Enhanced OA performance evaluations (HR-led; campus-wide)	1 2	4	4	4
More inclusive employee recognition practices (HR-led; campus-wide)	1 2	4	4	4
Make cultural competence a core competency for employees (HR-led; campus-wide)		1	2	4
More visible HR support for international employees (HR-led; campus-wide)	1 2	4	4	4
Enhanced HR support for transgender and LGBTQIA+ employees and prospective employees (HR-led; campus-wide)	1 2	4	4	4
Enhanced HR engagement in disability issues (HR-led; campus-wide)	1 2	4	4	4