

2017-2020 UO Diversity Action Plan

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

March 17, 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 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 1st, 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

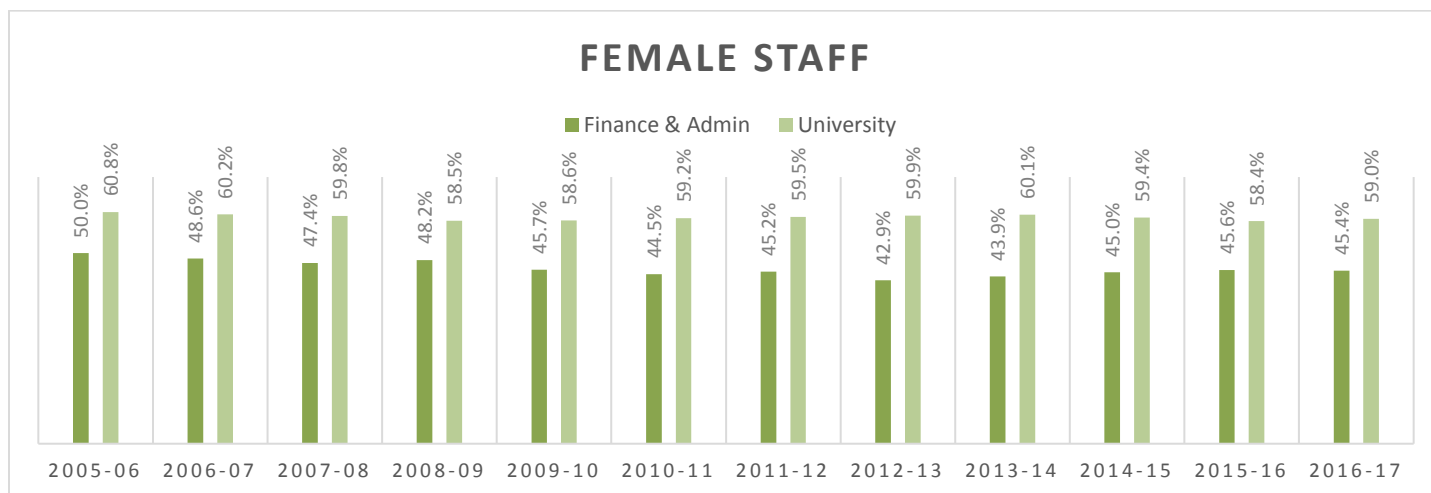
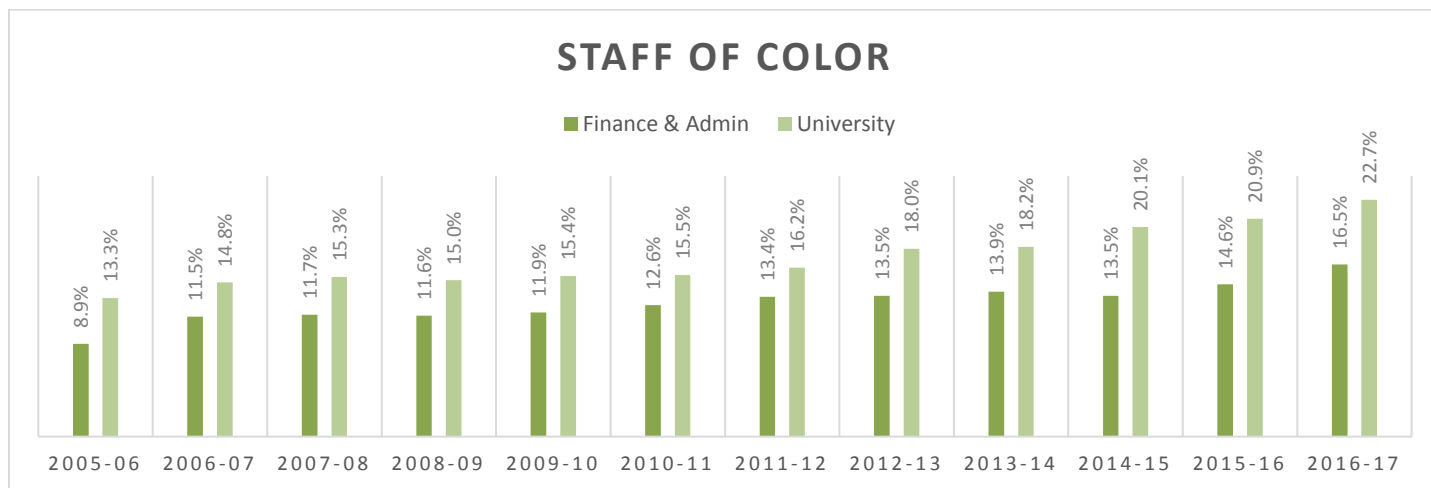
and unit leaders also engaged and collected feedback from colleagues in their units at standing staff meetings. The feedback collected has been incredibly helpful. We have incorporated some of the feedback directly into this plan and other comments and ideas will be used to inform how we deploy the various strategies and tactics.

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 and which are 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 intend to look at ways to provide greater opportunity for more staff in our portfolio to participate, with particular attention to those who serve on search committees.
- *Training research/exploration* by members of 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.
- *Finance and Administration all-staff climate survey.* This survey will be distributed to current Finance and Administration employees with response via an anonymous link. The survey is not yet under development, although we intend to 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. Following the roll-out within the Finance and Administration portfolio, HR intends to leverage insights and information obtained in order to evaluate readiness for an all-campus survey.
- *Exit survey and exit interview.* Beginning in February 2017, all employees who separate from a position in the Finance and Administration portfolio will be sent an online exit questionnaire and will be 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, 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 has recently been launched 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. This will enhance opportunities for sharing perspectives, finding commonalities/affinities, informal coaching/mentoring, identifying new areas of professional interest for potential career progression, etc.

- *Supervisor skill development cohort.* We plan to pilot a six-month program for cohorts of 6-8 supervisors within Finance and Administration in which each participant will complete a self-assessment and then work through a curriculum to build the skills necessary to successfully communicate with, lead, and build an inclusive community among their direct reports. The program will include significant cohort and team-building activities.
- *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 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 directors and 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
- *Diversity Committee Participation.* 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. Include a regular rotation of participants in order to ensure broad representation and access as well as diversity of ideas and contributions.

Lessons Learned and Recommendations for University-Wide Diversity Initiatives

Throughout this 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:

- 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, contribute to the reduction of “silos”, increase impact of the data, etc. The survey could be administered routinely on a periodic basis for longitudinal study.
- 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. HR’s professional development and training website (currently Making Tracks and, once deployed, MyTrack) could be used for promotion, participant management, and post-training evaluation for quality control purposes.
- 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 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.
- *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.
- Our staff 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.

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 Exit survey and exit interviews (see description in executive summary) | <ul style="list-style-type: none"> -Number of employees participating in survey and exit interviews -Percent of employees separating who participate in survey and exit interviews -Number of actionable suggestions received | 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 was launched February 2017. |
| 1.2 All-staff climate survey (see description in executive summary) | <ul style="list-style-type: none"> -Response rate -Number of actionable suggestions received | Members of the VPFA diversity committee; relevant online resources provided by DEI and HR will be referred to; Qualtrics survey software. | Kassy Fisher, Asst. VP for Administration and Chief of Staff | The survey and an implementation plan will be developed over the remainder of FY 2017 with the survey to be disseminated in FY2018. |
| 1.3 VPFA staff visits (see description in executive summary) | <ul style="list-style-type: none"> -Number 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 spring 2018. If successful, this will be repeated annually. |
| 1.4 Visible HR presence and engagement through training at HR all hands (all staff) meetings on such topics as LGBTQ awareness, race relations, and how to be an ally; through presentations on disability/ADA at HR Partners meetings; through direct correspondence with | <ul style="list-style-type: none"> -Number of inclusion-focused trainings and presenters at HR all hands meetings and at HR Partners meetings per year -Number of campus diversity events promoted to HR staff | 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. |

| Tactics | Target measures of success | Resources to be used for this tactic | Name and title of lead personnel | Timeline |
|---|--|--------------------------------------|----------------------------------|----------|
| employees with visa status and with all employees through the “respectful workplace” memo; and through HR staff presence at diversity-centered campus events. | <p>through all hands meetings, and the HR internal newsletter</p> <p>-Number of HR staff who attend campus diversity events</p> <p>-Number of campus diversity events at which there is an HR staff person present</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.

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 |
|---|---|---|--|--|
| 2.1 Implicit bias training (see description in executive summary) | -Number of representatives with implicit bias training experience serving on search committees for VPFA positions | Erik Girvan or others with implicit bias training expertise; VPFA diversity committee members | Kassy Fisher, Asst. VP for Administration and Chief of Staff | By the end of FY2017, we will have identified mechanisms for tracking staff participation in implicit bias training and will begin work to systematically identify search committee members who have and have not participated in the training. We will roll |

| Tactics | Target measures of success | Resources to be used for this tactic | Name and title of lead personnel | Timeline |
|--|--|---|--|---|
| | | | | out additional training in FY2018. |
| 2.2 Five-year comprehensive performance reviews (see description in executive summary) | <ul style="list-style-type: none"> -Number of five year reviews completed per year -Percent of leadership team eligible for review that has received 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 will be referred to. | Kassy Fisher, Asst. VP for Administration and Chief of Staff | By September 2017, a draft schedule and implementation plan will be developed. The goal is for 1-2 reviews per year to take place beginning in FY2018. |
| 2.3 Supervisor skill development cohort (see description in executive summary) | <ul style="list-style-type: none"> -Number of supervisors that participate in training -Number of trainings offered through the program -Results of pre- and post- self-assessment -Overtime: 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 | Development of the program is underway. Recruitment of the first cohort will begin in April 2017. |
| 2.4 Training research/exploration and recommendations to the VPFA/CFO (see description in executive summary) | <ul style="list-style-type: none"> -Number of identified trainings -Number of employees participating in identified trainings | 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 FY2018, with individual trainings or training series recommended to the VPFA/CFO, with proposals for implementation no later than FY2019. |
| 2.5 HR to incorporate feedback from DEI to ensure that all available OA performance | -Number of OA performance evaluations using the new templates | HR and DEI staff. | Bill Brady and Annie Bentz, Employee and | New language to be incorporated by April 15, 2017 |

| Tactics | Target measures of success | Resources to be used for this tactic | Name and title of lead personnel | Timeline |
|--|--|--------------------------------------|--|--|
| evaluation templates incorporate diversity and inclusion measures. | -Number of OA employees evaluated using diversity and inclusion as a metric | | Labor Relations, HR | |
| <p>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.</p> <p>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.</p> | <p>-Number of recognition events per year</p> <p>-Number of invitees attending each event that represent different employee groups (i.e., OAs, classified staff, faculty, and administrators)</p> <p>-Number of honorees invited to at each event from different employee groups</p> <p>-Direct, positive feedback from impacted employees</p> | 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 |
|--|--|--|--|---|
| 1.1 Applicant pool enhancement research and pilot (see description in executive summary) | <ul style="list-style-type: none"> -Number of new tools or processes implemented within first year of project, and within each subsequent year -Metrics on levels of diversity in applicant pools? | Members of the VPFA diversity committee; Strategic Doing strategies and facilitator. | Stacey Marple, HR Generalist, Finance and Administration Shared Services | The committee will engage in research and the development of at least one pilot project prior to the end of FY2019, with implementation to follow. |
| 1.2 Implicit bias training (see description in executive summary) | <ul style="list-style-type: none"> -Number of representatives with implicit bias training experience serving on search committees for VPFA positions | 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 | By the end of FY2017, we will have identified mechanisms for tracking staff participation in implicit bias training and will begin work to systematically identify search committee members who have and have not participated in the training. We will roll out additional training in FY2018. |
| 1.3 VPFA student pipeline internship program (see description in executive summary) | <ul style="list-style-type: none"> -Number of students participating in the program -Number of students of color participating in the program -Number 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 2017 with the pilot cohort to be recruited for the Fall 2018 academic term. |
| 1.4 HR will redesign language in position descriptions to include | <ul style="list-style-type: none"> -New language to be included in PD. | HR staff, specifically on the Talent Acquisition team | Nancy Nieraeth, | These activities will take place in phases, |

| Tactics | Target measures of success | Resources to be used for this tactic | Name/title of lead personnel | Timeline |
|--|---|--------------------------------------|---|----------------------------|
| 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 | -New language will be included in vacancy announcements | | Director of Talent Acquisition, Human Resources | beginning in early FY2018. |
| 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. | | | | |

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

| Tactics | Target measures of success | Resources to be used for this tactic | Name/title of lead personnel | Timeline |
|---|--|---|--|---|
| 2.1 All-staff climate survey (see description in executive summary) | -Response rate -Number of actionable suggestions received | Members of the VPFA diversity committee; relevant online resources provided by DEI and HR will be referred to; Qualtrics survey software. | Kassy Fisher, Asst. VP for Administration and Chief of Staff | The survey and an implementation plan will be developed over the remainder of FY 2017 with the survey to be disseminated in FY2018. |
| 2.2 Exit survey and exit interview (see description in executive summary) | -Number of employees participating in survey and exit interviews -Percent of employees separating who | 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 was launched February 2017. |

| Tactics | Target measures of success | Resources to be used for this tactic | Name/title of lead personnel | Timeline |
|---|--|--|---|---|
| | <p>participate in survey and exit interviews</p> <p>-Number of actionable suggestions received</p> | | | |
| 2.3 VPFA leadership development program (see description in executive summary) | <p>-Number of employees participating in program</p> <p>-Overtime: Number of participants who are promoted</p> | 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 FY2018 with the pilot cohort to be recruited for FY2019. The experience of the nearer-term supervisor skill development cohort will inform this program. |
| 2.4. Monthly networking sessions (see description in executive summary) | <p>- Ratio of new and current employees at each event</p> <p>-Number of cross-unit collaborations among employees</p> <p>-Over time: number of promotions</p> <p>-Attendee survey feedback</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 | Krista Dillon, Director of Operations, Safety and Risk Services; Sonia Potter, Director of HR Operations, Human Resources | The first networking session took place in February 2017. Subsequent networking sessions have been scheduled for March and April, 2017. |
| 2.5 HR international employment specialist's collaboration and engagement in support of international employees | <p>-Number of attendees at forums and meetings specific to immigration law and enforcement, international hiring, etc.</p> <p>-Over time: Percentage of UO employees in visa status</p> | HR staff, colleagues in the Office of International Affairs | Nancy Nieraeth, Director of Talent Acquisition, and Jennifer Doreen, HR International Employment Specialist | Already underway. This need was highlighted by a presidential executive order in January 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 #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 |
|--|---|---|---|---|
| 1.1 Monthly employee spotlight (see description in executive summary) | <ul style="list-style-type: none"> -Number of employees spotlighted in one year -Number of places (e.g., websites, newsletters) that employee spotlights appear -Number 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 | This program is being developed in winter 2017, with a pilot spotlight in Campus Planning and Facilities Management. Other spotlights to follow. |
| 1.2 VPFA leadership development program (see description in executive summary) | <ul style="list-style-type: none"> -Number of employees participating in program -Overtime: Number 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 FY2018 with the pilot cohort to be recruited for the FY2018. The experience of the nearer-term supervisor skill development cohort will inform this program. |
| 1.3 VPFA student internship program (see description in executive summary) | <ul style="list-style-type: none"> -Number of students participating in the program -Number of students of color participating in the program | 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 program will be developed in 2017 with the pilot cohort to be recruited for the Fall 2018 academic term. |

| Tactics | Target measures of success | Resources to be used for this tactic | Name and title of lead personnel | Timeline |
|---|--|--|---|--|
| | -Number of students who participate in the program who gain employment at the UO and, specifically, within VPFA portfolio | | the VPFA/CFO | |
| 1.4 HR staff engagement in support of employees who identify as LGBTQ. 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) | -Number of trainings HR staff members receive and put to use -Presence of resources for LGBTQ and gender transition on HR website | HR's national professional organization, Society for Human Resource Management (SHRM), campus contacts and experts, HR staff | Nancy Resnick, Assoc. VP and CHRO Kaia Rogers, Director HR Programs and Services | SHRM training to be completed in February 2017, with additional activities to follow based on the training received. |

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.

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 |
|---|---|--|---|--|
| 2.1 Monthly employee spotlight (see description in executive summary) | -Number of employees spotlighted in one year -Number of places (e.g., websites, newsletters) that employee spotlights appear | 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 | Tony Hardenbrook, Director of Utilities and Energy, Campus Planning and | This program is being developed in winter 2017, with a pilot spotlight in Campus Planning and Facilities Management. Other spotlights to follow. |

| Tactics | Target measures of success | Resources to be used for this tactic | Name and title of lead personnel | Timeline |
|--|--|--|---|---|
| | -Number of web hits per spotlight and in total | VPFA leadership council make up the team on this effort. | Facilities Management | |
| 2.2 VPFA student pipeline internship program (see description in executive summary) | <ul style="list-style-type: none"> -Number of students participating in the program -Number of students of color participating in the program -Number 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 Jouban, Executive Assistant to the VPFA/CFO | The program will be developed in 2017 with the pilot cohort to be recruited for the Fall 2018 academic term. |
| 2.3 Monthly networking sessions (see description in executive summary) | <ul style="list-style-type: none"> -Number of employees who attend -Number of cross-unit collaborations among employees -Overtime: number 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 | The first networking session took place in February 2017. Subsequent networking sessions have been scheduled for March and April, 2017. |
| 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 | <ul style="list-style-type: none"> -Number of employees who serve as panelists in MIUSA international events -Successful launch of, and number of students recruited to earn, the disability studies undergraduate minor | HR and Affirmative Action office staff, including Martin Stanberry, Equal Opportunity Specialist (ADA coordinator) | Nancy Resnick, Assoc. VP and CHRO, and Martin Stanberry, Equal Opportunity Specialist, Office of Affirmative Action | Periodic and ongoing. HR's first participation took place at the annual conference in May 2016. These will take place annually thereafter |

| Tactics | Target measures of success | Resources to be used for this tactic | Name and title of lead personnel | Timeline |
|---|----------------------------|--------------------------------------|----------------------------------|----------|
| related to disability resources and awareness | | | | |

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 |
|---|--|--|--|--|
| 1.1 VPFA student pipeline internship program (see description in executive summary) | <ul style="list-style-type: none"> -Number of students participating in the program -Number of students of color participating in the program -Number 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 2017 with the pilot cohort to be recruited for the Fall 2018 academic term. |
| 1.2 VPFA leadership development program (see description in executive summary) | -Number of employees participating in program | The VPFA/CFO and some members of the VPFA leadership council will develop the program; | Andre Le Duc, Associate Vice President and Chief | The program will be developed in FY2018 with the pilot cohort to be recruited for the FY2018. The experience |

| Tactics | Target measures of success | Resources to be used for this tactic | Name and title of lead personnel | Timeline |
|--|--|--|--|---|
| | -Overtime: Number of participants who are promoted | university leaders will be engaged for networking. | Resilience Officer | of the nearer-term supervisor skill development cohort will inform this program. |
| 1.3 Supervisor skill development cohort (see description in executive summary) | -Number of supervisors that participate in training -Number of trainings offered through the program -Results of pre- and post- self-assessment -Overtime: 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 | Development of the program is underway. Recruitment of the first cohort will begin in April 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.

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 |
|---|--|--------------------------------------|--|--|
| 2.1 Expanded diversity committee participation (see description in executive summary) | -Number of units represented on the committee -Participation rate of members (e.g., through attendance at meetings, | | Kassy Fisher, Asst. VP for Administration and Chief of Staff | The diversity committee membership is reviewed at the start of each academic year to ensure that there is good representation from across the portfolio. |

| Tactics | Target measures of success | Resources to be used for this tactic | Name and title of lead personnel | Timeline |
|--|--|---|--|--|
| | <p>engagement in initiatives)</p> <p>-Number of employees serving on the committee and requesting to serve on the committee</p> | | | Vacancies are filled with attention to having representation across gender and race/ethnicity. Before the end of FY 2017, the committee will decide upon term limits for membership and document member obligations/expectations. |
| 2.2 Equity and inclusion professional development fund (see description in executive summary) | <p>-Number of requests and number of funded requests</p> <p>-</p> <p>-Number of ideas/opportunities that yield new practices, increased recruitment and retention of diverse employees, improved climate</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; | | By December 2017, 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 as learned). |
| 2.3 Training research/exploration and recommendations to the VPFA/CFO (see description in executive summary) | <p>-Number of identified trainings</p> <p>-Number of employees participating in identified trainings</p> | 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 FY2018, with individual trainings or training series recommended to the VPFA/CFO, with proposals for implementation no later than FY2019. |

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.

APPENDIX: FINANCE AND ADMINISTRATION TACTICS IDEAL GRID

| Tactic | Inclusion | Diversity | Evaluation | Achievement | Leadership |
|--|-----------|-----------|------------|-------------|------------|
| Diversity Committee-Led/Focused | | | | | |
| Finance and Administration all-staff climate survey | ● | ● | ● | | |
| Finance and Administration employee exit survey and exit interview | ● | ● | ● | | |
| Implicit bias training | ● | ● | ● | | |
| Applicant pool enhancement research and pilot program | | ● | ● | | |
| Training opportunity research/exploration | ● | | ● | | |
| VPFA diversity committee participation | | | ● | | ● |
| 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 visibility, presence and engagement | ● | | ● | ● |
| Enhanced OA performance evaluations | ● | | ● | |
| More inclusive employee recognition practices | ● | ● | ● | |
| Make cultural competence a core competency | | ● | ● | |
| More visible support for international employees | ● | ● | ● | |
| Enhanced support for transgender and LGBTQ employees and prospective employees | ● | ● | ● | |
| Enhanced HR engagement in disability issues | ● | ● | ● | ● |
| Representation in leadership-level efforts | | | ● | ● |