Building a POSITIVE and INCLUSIVE Organization
Our Progress

This year we developed and launched a new B&F Strategic Plan focused on building a positive organizational culture. Across all areas of B&F, we’re working to create an organization in which everyone believes that what they do matters and that they can make a difference.

Foundational to this initiative are our ongoing efforts to create a more diverse, equitable, and inclusive work environment. The continuing implementation of our B&F DEI Strategic Plan has become an integral part of our work to create a positive organization.

The following progress report includes key highlights of this work over the last year.

Climate Survey

In January, 2018, we released results from the university-wide All-Staff Climate Survey, including reports for B&F overall as well as for each division. The findings provided key insights about our current culture, and we chose nine findings to serve as a baseline for our work to create a positive organization and measure progress over time (see our “Key 9” findings on the B&F website). In addition, our Diversity Working Group (DWG) developed a Climate Survey Discussion Guide, which was customized for each B&F division, to support leaders in discussing the results with their staff and inform future actions.

APPRECIATING DIVERSITY AT THE SSC

Each year, the SSC diversity committee plans a number of fun and educational activities for staff to engage with each other and learn about topics related to DEI – from keynote speakers, to book and movie discussions, to cultural awareness potlucks. This year they added “Diversity Bingo” to the roster. All SSC team members were given one of eight bingo cards that had 25 categories, such as “is an author,” “has three or more children,” and “played a varsity sport in high school.” Staff were given two days to identify colleagues who fit each category on their card. Once cards were completed, staff were entered into a raffle to win a prize.

The game was a huge hit among staff because participating gave them a chance to get to know their colleagues in a fun and informal way. It also provided an opportunity to learn something interesting about each other and, more importantly, about the breadth of diversity that exists at the SSC.
To create a more inclusive and welcoming experience for new staff, F&O overhauled its orientation process this year. Now, all new employees attend a half-day event designed to provide an overview of the F&O organization, introduce concepts related to creating a positive organization, discuss F&O’s commitment to safety, and build community among the new team members. One of F&O’s senior directors attends each orientation, which are held monthly, to ensure new employees have the opportunity to engage with leadership and get a big-picture view of how F&O fits within B&F and the university.

The orientation also includes a one-hour training called “Speaking up on Behalf of Respect,” which offers practical tips on how to promote a positive and inclusive climate and ensure all employees feel valued and respected in the workplace. Participants explore the impact of stereotypical comments and biased behaviors, build skills focused on bystander intervention and respectfully speaking up against disrespectful behavior, and learn about their role in promoting a respectful, welcoming, and inclusive work environment.

**B&F Leadership Forum**

To support culture change, our monthly B&F Leadership Forum meetings focused on engaging leaders in building a positive and inclusive organization, developing their skills and encouraging them to share related ideas and strategies with each other. For example, we brought in culture expert Adrian Gostick to lead a half-day training for forum members on how to increase employee engagement and ensure all team members have an opportunity to contribute and feel valued. We also regularly connected DEI with positive culture and provided forum members with communications tools and resources designed to encourage sharing of information with their teams.

98% of forum members say they learned new techniques or ideas they’ll try with their teams

70% of forum members report that they are frequently sharing information about the forums with staff

**Working Groups**

We established cross-departmental working groups to further explore key issues related to building a positive organization, work which will continue in FY19. These efforts include:

- **The On-the-Job Development Committee**, which is exploring best practice for creating experiential and action-based professional development opportunities for staff
- **The Work Space Flexibility Committee**, which is testing a variety of work flexibility options across B&F via a number of three-month pilot programs
- An ad hoc committee focused on exploring strategies to promote reciprocity, or “asking and giving” behavior, beginning with forum members

**A POSITIVE AND INCLUSIVE WELCOME FOR NEW F&O STAFF**

To create a more inclusive and welcoming experience for new staff, F&O overhauled its orientation process this year. Now, all new employees attend a half-day event designed to provide an overview of the F&O organization, introduce concepts related to creating a positive organization, discuss F&O’s commitment to safety, and build community among the new team members. One of F&O’s senior directors attends each orientation, which are held monthly, to ensure new employees have the opportunity to engage with leadership and get a big-picture view of how F&O fits within B&F and the university.

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ENGAGING ALL UHR STAFF IN DEI

This year, UHR launched a new all-staff DEI newsletter, designed to share information about ways UHR staff can get involved in related events, activities and educational offerings. The newsletter also serves to promote the university’s ongoing commitment to creating a more diverse, equitable and inclusive work environment.

Content from the newsletter comes from UHR’s newly established DEI advisory committee, a group of staff from across UHR who plan activities that help build community and provide staff with opportunities to engage with each other on topics related to inclusion and cultural awareness. For example, the advisory group recently launched a pilot book club, which will be led by a university faculty member, called Books@Work. Participants will meet for 12 weeks to read and discuss various books, short stories and other writings addressing DEI-related topics.

Targeted DEI Strategy

In recognition that a one-size-fits-all approach was not adequately addressing the diverse needs and opportunities across all areas of B&F, we have significantly refined our DEI Strategic Plan and adopted a set of more targeted DEI strategies. For example, given the diversity of job functions and staff skillsets across B&F, the needs around “recruitment, hiring and development” vary significantly. DEI leaders within each division will be empowered to develop tailored programs and strategies to meet their individualized needs. Now we are not only better able to focus our efforts in each division on the highest-impact actions, but have also been able to identify central, B&F-wide actions based on common needs, such as the new hiring and selection training.

Hiring & Selection Training

Under the direction of B&F’s Human Resources Steering Group, we developed and piloted a hiring and selection-focused version of Unconscious Bias training, which will roll out broadly to B&F hiring managers next year. We also are developing a new online training module which maps out the hiring and selection process, highlights all related legal and compliance topics and establishes “bias checkpoints” to remind participants of key topics from the in-person bias training throughout the hiring process. Both tools will be widely implemented with hiring managers across B&F in FY19.
Staff Recognition and Access to Leadership

To ensure staff feel recognized for the critical work they do for the university, this year we developed more than 50 all-staff communications designed to highlight the value and contributions of more than 60 B&F teams, including weekly messages from Executive Vice President and Chief Financial Officer Kevin Hegarty and team-focused feature stories on the B&F website. A variety of similar efforts have been implemented within B&F divisions.

In response to staff feedback during our DEI planning year, we have focused on increasing staff access to leadership and ensuring staff feel both valued and included. Across B&F, there have been more than 100 events and activities designed to provide staff with access to leadership, including team site visits from top leaders, monthly staff breakfasts with Kevin Hegarty, and leadership participation in a variety of team meetings. More than 70 social, team-building and recognition events took place across B&F – from team potlucks, to social outings, to formal appreciation events – to increase a sense of inclusion and build community among staff.

This year, across B&F there were:

- **MORE THAN 100** events and activities designed to provide staff with access to leadership
- **MORE THAN 70** social, team-building and recognition events
- **MORE THAN 50** all-staff communications which highlighted more than 60 teams

BUILDING RELATIONSHIPS IN FINANCE

To connect with staff from across Finance, Associate Vice President for Finance Nancy Hobbs hosts approximately 15 staff for breakfast every other month. The informal and relaxed setting provides an opportunity for the group to get to know each other and hear updates on major initiatives, and staff can ask questions or engage the group in topics of interest. Nancy has been doing the breakfasts with staff since she became the AVPF, as part of her deep commitment to building relationships and being present for staff. The breakfasts include both new and long-term employees from different departments, which ensures a lively and productive discussion – and they also have some fun!

In addition to the breakfasts, Finance also holds several all-staff events and celebrations, including an annual year-end party and ice cream social, as well as the FinForum, which allows all employees to get together in one place, hear updates on strategic initiatives, learn about future plans, ask questions, and listen to presentations from speakers across the organization.
At separate events this year, the Investment Office and Information Quest both explored differences among their teams using the DiSC assessment model. After team members took a brief online survey, they were given a detailed report about their personality and style preferences. A trained facilitator then met with the entire team to engage the group in a conversation about personality types and how their style preferences may differ from one another. They also explored strategies each team member can use to adapt their behavior when working with their colleagues, to create more inclusive and effective teamwork.

For both the Investment Office and Information Quest, the DiSC exercise not only helped them recognize and appreciate the differences among their team members, but it also laid the foundation for future culture-building efforts.