Business & Finance

Diversity, Equity, and Inclusion Strategic Plan

Five-Year Strategic Objectives, Measures and FY21 Action Items

DIVERSITY, EQUITY & INCLUSION
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Diversity Equity and Inclusion Strategic Plan Overview

At the University of Michigan, our dedication to academic excellence for the public good is inseparable from our commitment to diversity, equity, and inclusion. It is central to our mission as an educational institution to ensure that each member of our community has full opportunity to thrive in our environment, for we believe that diversity, equity and inclusion is key to individual flourishing, educational excellence, and the advancement of knowledge.

Goals: Diversity, Equity and Inclusion

Diversity: We commit to increasing diversity, which is expressed in myriad forms, including race and ethnicity, gender and gender identity, sexual orientation, socio-economic status, language, culture, national origin, religious commitments, age, (dis)ability status, and political perspective.

Equity: We commit to working actively to challenge and respond to bias, harassment, and discrimination. We are committed to a policy of equal opportunity for all persons and do not discriminate on the basis of race, color, national origin, age, marital status, sex, sexual orientation, gender identity, gender expression, disability, religion, height, weight, or veteran status.

Inclusion: We commit to pursuing deliberate efforts to ensure that our campus is a place where differences are welcomed, different perspectives are respectfully heard, and where every individual feels a sense of belonging and inclusion. We know that by building a critical mass of diverse groups on campus and creating a vibrant climate of inclusiveness, we can more effectively leverage the resources of diversity to advance our collective capabilities.
Rationale: Mission, Vision, Values of Business and Finance

Business and Finance (B&F) seeks to enhance diversity, equity, and inclusion among its five areas: Facilities and Operations, Finance, Investment Office, Shared Services Center and University Human Resources. The more diverse our staff, the more equitable our experience, and the more inclusive our workplaces, the better we are able to create a positive workplace climate. We believe this type of climate attracts and retains the best talent and enables us all to provide exceptional service to advance the university’s mission.

Planning Team and Process

B&F leadership appointed the B&F Diversity Working Group in September 2015 and charged them to oversee the DEI planning process. Starting in November 2015, the BFDWG began gathering and analyzing data from a variety of sources to understand the local climate, identify key challenges and opportunities, and generate ideas about how to best promote DEI within B&F. This information formed the basis of our strategic objectives and Year One action items, which were further refined by leadership.

Over the last four years, B&F has implemented changes to the structure and related processes for our DEI work that began in Year One. In Year Two, the BFDWG focus shifted from overseeing the overall plan implementation to a more strategic and targeted emphasis on DEI-related engagement and education in each of the B&F areas. In Years Three and Four, our structure and processes remained the same, though we continued to seek ways to be more efficient and effective. Leaders across B&F are responsible for moving our DEI work forward; however, the following six groups have been designated as key action owners for managing and reporting on major DEI areas of focus:

- The B&F Diversity Working Group (DWG), made up of at least one DEI lead from each B&F area, oversees DEI engagement and education efforts in each area, tracks that work and looks for opportunities to collaborate across B&F. To further support and enhance this work, the DWG members have each established new, or enlisted existing, staff committees in their areas.
- The B&F Communications Team, comprised of at least one representative from each B&F area, develops and implements a strategic communications plan focused primarily on promoting a positive and inclusive culture, recognizing the important contributions of the various B&F teams, and helping ensure individual staff feel valued and appreciated.
- The B&F Human Resources Steering Group, made up of the HR directors from each B&F area, directs the DEI work related to recruitment, hiring and selection and retention. For example, the steering group is directing the new hiring and selection training under development.
- The EVPCFOS Senior Staff represents B&F’s executive team, are the sponsors of our DEI Strategic Plan and ultimately responsible for shepherding its implementation. They ensure representation from each area on all the DEI-related implementation groups, as
well as oversee DEI work done with and through the top three levels of leadership in B&F.

- Lead Trainers from B&F areas, in those that have them, provide guidance around leadership development as it relates to DEI and collaborate closely with their area’s DWG member.
- Two B&F DEI Leads provide project management support to drive the DEI work happening across B&F and oversee the overall implementation of the DEI Strategic Plan.

With this infrastructure, we are well positioned to continue working together effectively in Year Five.

Throughout the Year Four implementation, we collected additional information about challenges and opportunities, as well as new data on which interventions were successful and which were not. We used this information, in combination with our original assessment data, to adjust our plan for Year Five. Our B&F DEI leads solicited input and feedback on Year Five action items from a variety of stakeholders, including the six groups listed above, as well as subject-matter experts from across the organization, and these action items were approved by B&F leadership.

**Data Analysis and Themes**

During the initial planning year, various data were collected and analyzed, and a number of themes were identified that shaped the strategic objectives and action plans.

The major themes identified through both data analysis and engagement activities with B&F staff in Fall 2015-Spring 2016 included:

- Provide education and develop DEI skills
- Hiring and HR practices
- Staff diversity
- Career development and advancement
- Celebrate cultural differences
- Build strong teams
- Culture and climate
- Empowerment

These themes continue to guide and inform our Year Five planning efforts, in combination with learnings from our Year Four implementation, Climate Survey and B&F Employee Engagement Survey results and more recent employee profile data.

As a whole, the B&F staff community is comprised of more males (56% male) than females, has 22% minority members, and has an average age of 47.
B&F Employee Profile (November 2019)

<table>
<thead>
<tr>
<th>Headcount</th>
<th>Female (%)</th>
<th>Male (%)</th>
<th>Minority (%)</th>
<th>Avg. Age</th>
<th>Avg. Years of Service</th>
<th>Eligible to Retire (%)</th>
</tr>
</thead>
<tbody>
<tr>
<td>EVPCFO Senior Staff Members**</td>
<td>9</td>
<td>44%</td>
<td>56%</td>
<td>33%</td>
<td>55</td>
<td>13</td>
</tr>
<tr>
<td>EVPCFO Office</td>
<td>10</td>
<td>90%</td>
<td>10%</td>
<td>40%</td>
<td>49</td>
<td>9</td>
</tr>
<tr>
<td>F&amp;O</td>
<td>1750</td>
<td>27%</td>
<td>73%</td>
<td>24%</td>
<td>48</td>
<td>12</td>
</tr>
<tr>
<td>Finance</td>
<td>375</td>
<td>63%</td>
<td>37%</td>
<td>17%</td>
<td>46</td>
<td>13</td>
</tr>
<tr>
<td>Investment Office</td>
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<td>55%</td>
<td>45%</td>
<td>18%</td>
<td>44</td>
<td>10</td>
</tr>
<tr>
<td>SSC</td>
<td>247</td>
<td>76%</td>
<td>24%</td>
<td>19%</td>
<td>42</td>
<td>8</td>
</tr>
<tr>
<td>UHR</td>
<td>303</td>
<td>86%</td>
<td>14%</td>
<td>20%</td>
<td>46</td>
<td>11</td>
</tr>
<tr>
<td><strong>B&amp;F Total</strong></td>
<td><strong>2707</strong></td>
<td><strong>44%</strong></td>
<td><strong>56%</strong></td>
<td><strong>22%</strong></td>
<td><strong>47</strong></td>
<td><strong>12</strong></td>
</tr>
</tbody>
</table>

**NOTE: Each of the Senior Staff Members is also included in the data for her/his AVP area. Overall B&F Totals only count a person once.

In Year Five, we will continue deepening our understanding of key challenges and opportunities with the results of FY21 climate data, the FY21 B&F Employee Engagement Survey, B&F Leadership Forum feedback, additional staff engagement efforts, and key learnings from our Year Four implementation efforts.

Synthesis of Findings

During the initial planning year, members of the planning team categorized findings from each area of B&F into four planning domains (Recruitment, Retention and Development; Education and Scholarship; Promoting an Equitable and Inclusive Community; Service) to identify commonalities from multiple units. The first three domains remained the same for our Year Three plan, the fourth domain, “Service,” was removed in Year Two. While the service domain is foundationally important to B&F, our university-wide service work relative to DEI is specifically reflected in the central U-M DEI Strategic Plan (accessible facilities, staff recruitment and retention, employee training, etc.) and thus is not duplicated in the B&F DEI Plan (see BFDWG Findings/Recommendations summary table below).

Last year we added Item 8. Sexual misconduct/harassment training to the Education domain, in support of the campus wide effort to educate our community on sexual harassment and misconduct prevention in an effort to promote a safe and supportive environment for all members to work, learn, and thrive.
# BFDWG Findings/Recommendations summary (updated July 2019)

## Preliminary list of common findings and potential strategies and tactics for B&F 5-year plan

### Recruitment, Retention and Development

1. Expanded recruitment strategy
   a. Deeper data dive
   b. More resources for diversity hiring resources within HR
   c. State the university’s commitment to DEI in every B&F job posting
   d. Hire a recruiter to reach out to underrepresented communities
2. Succession planning
3. Define path for advancement
4. Mentoring opportunities
5. Perform equity reviews to identify biases related to race and gender with regard to compensation and promotion
6. Cross-functional development opportunities
7. Greater tuition assistance

### Education

1. DEI training for managers and staff
2. Hiring training (do’s, don'ts, etc.)
3. Educate staff about cultural differences, abilities
4. Bring educational opportunities to staff departments/locations
5. Increase B&F diversity resources (expert, dedicated staff?)
6. Unconscious Bias/Privilege
7. Change role of diversity committee
8. Sexual misconduct/harassment training

### Promoting an Equitable and Inclusive Community

1. Increase engagement, from top-down
2. DEI accountability for managers and staff
   a. Annual reviews
   b. Employee satisfaction survey
3. Create management feedback loop
4. Gender-neutral bathrooms
5. More staff town hall events themed around DEI
6. Match minority students with staff mentors
7. Allow opportunities for openness, honesty w/o repercussions
8. Increase feeling of being equal stakeholders/Expose staff to different parts of the university on a routine basis
9. Encourage staff to express differences
10. Create training and materials to ensure our products/services are accessible

### Service

- B&F’s university-wide service relative to DEI are reflected in the central U-M DEI Strategic Plan.

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### Year Four Highlights and Impact Since Launch

In B&F, all DEI work has been fully integrated into our overall organizational strategic plan, which is focused on building a positive and inclusive organizational culture. Across all areas of B&F, we are working to create an environment where staff believe that what they do matters and that they can make a difference. Our EYPCFO, Kevin Hegarty, his senior leadership team, and the top three tiers of leadership that attend the B&F Leadership Forum lead the way in support of this important work. Our cross-departmental committees and our newly formed Positive Energizers team of more than 160 staff influencers are also critical to the success of this work.

Over the last few years, we have seen the positive results of our efforts to move from a centrally managed, “one-size-fits-all” DEI action plan toward a more intentionally targeted approach to DEI in B&F. While we share the common aim to make progress on our goal of creating a
positive organization that is more diverse, equitable and inclusive, each area of B&F is able to do so in a manner that is aligned with the unique needs of their functional areas, microclimates and employees. Most B&F areas have their own DEI task force, advisory group or committee, led by a B&F Diversity Working Group (BFDWG) member. The BFDWG members work with their local leaders, human resource directors, communication directors and training leads to ensure DEI efforts are aligned with overall culture efforts in each B&F area.

In addition to the local efforts, B&F’s DEI implementation leads (DEI-ILG members) also coordinate a number of key initiatives centrally. We continue to convene our expanded leadership group, called the B&F Leadership Forum, once a month during the academic year to discuss topics related to positive and inclusive leadership, and provide a platform for leaders to share ideas and build relationships with others working to effect culture change. We also meet twice a month with B&F’s DWG members to discuss B&F-wide initiatives and share ideas and resources. B&F’s DEI-ILG members serve as project managers and leads for the overall DEI effort in B&F and help support the local efforts in each B&F area. Lastly, the DEI-ILG members also coordinate a cross-departmental communications team that meets monthly to create and implement strategies to connect teams to purpose, promote DEI and other culture goals, and ensure staff are aware of key support resources available to them.

**DEI/Positive Culture Engagement Efforts, Events and Activities**

In Year Four, there were more than 1,350 activities, events or other engagement efforts across all areas of B&F, which were designed to help create a positive organizational culture and promote our values of diversity, equity and inclusion. This number is significantly higher than last year for two reasons: 1) we did a better job of tracking this year; and 2) there were an increased number of concerted efforts across B&F to engage employees, including our B&F positive energizer initiative.

All of these efforts were designed to make progress on our goals and create a workplace in which staff feel that they belong, feel valued as individuals, and believe their unit has a strong commitment to DEI. The following are just a few highlights of the work that happened over the last year:

- F&O teams watched videos and discussed topics such as, “intercultural responsiveness” and “pursuing self-awareness.” The Steve Robbin’s videos provided by Organizational Learning were watched by F&O teams and shown to new employees. Some F&O staff participated in the United Way 21-Day Equity Challenge. A brown bag lunch was held where a guest from the Spectrum Center discussed personal pronouns.
- Finance hosted a large Black History Month event where over 20 lesser-known African Americans were showcased. Each display offered a detailed history about the person as well as photos, videos and/or artifacts. There were poetry readings performed by African Americans, learning activities, and many resources provided. The event was enhanced and enlarged from a similar, but smaller event held last year for Finance staff that received great feedback. This year all B&F staff were invited to the event, held over a four-hour period and more than 200 B&F staff attended. The feedback was very positive and staff reported learning a great deal.
• The SSC held their own Black History Month celebrations and learning events over a four-week period, including educational activities like reading about a different African American person every day during their meeting huddles. They were planning a large effort to celebrate and educate SSC staff during Women’s History Month (March) but that effort was cut short by the COVID-19 crisis and need to focus on critical efforts to support the university and move employees to work-at-home environments.

• UHR designed and built a Diversity Tapestry board where event attendees take various colored yarn and wrap it around pegs on a large board labeled with different personal characteristics such as “dog lover,” “traditionalist,” “foreign-born,” “black,” Pacific Islander,” “righty,” “lefty,” “indoorsy,” “athletic,” and more. After everyone has wrapped the yarn, the resulting design shows how our differences make a beautiful, colorful tapestry. This activity was done more than 10 times across B&F, including at our B&F Leadership Forum, giving staff the opportunity to see and celebrate differences among them.

• The Children’s Centers in UHR held community celebrations around cultural holidays like Diwali, Hanukkah, Kwanzaa, Christmas & Chinese New Year, engaging children, families and staff in celebrating diversity.

Of the 1,350 activities reported, more than 350 were designed to specifically address DEI topics:

• Events/activities across B&F addressed a wide variety of DEI topics such as:
  - LGBTQ and personal pronouns
  - Diversity Bingo (discovering similarities and differences among coworkers)
  - Mental health and recognizing the signs of suicide
  - The DEI Lifelong Learning Model
  - Disability awareness and etiquette, service dogs
  - Achievements of lesser-known African Americans, Black History Month
  - Appreciating Veterans
  - Diversity in high performing teams
  - Building inclusive, respectful and safe communities
  - The Opioid crisis in America
  - Socio-economic status, plus service activities with Food Gatherers and Maize & Blue Cupboard
  - Me, The Other film and discussion
  - Privilege and language related to gender identity and racial groups
  - Leading Through Respect discussions around diversity and being a bystander

B&F staff also participated in 245 DEI-related courses (7 different courses) offered by Organizational Learning.

In addition, hundreds of other activities focused more broadly on inclusion and were designed to create a workplace in which all staff feel valued, respected and that they belong. Some examples of these activities include:

• Regular theme-based potlucks where staff could get to know each other
• Compliment jars that encourage staff to recognize the good things their colleagues are doing
• Activities designed to promote the practice of gratitude
• Service and volunteer activities
• Personality assessments designed to build awareness about differences
• Positive culture boards that include inspiring messages and help staff deepen their relationships with each other
• Mindful Monday staff meditations and Reboot Thursday 15-minute dance parties
• Weekly, positive culture newsletters

Across B&F, all culture-building events, activities and efforts are tracked and mapped to one or more of our “Key Nine Climate Metrics,” which B&F leadership chose from the 2017 University Climate Survey to measure progress on our culture goals over time. The results of this process are below:

• My ideas are considered (181)
• I have a voice in decision-making (132)
• I am valued as an individual (324)
• I belong (342)
• I am treated with respect (279)
• My unit is committed to DEI (224)
• I have equal opportunities for success (96)
• I can perform to my full potential (117)
• I have experienced positive growth (158)

According to evaluations, B&F staff are grateful for the opportunities to spend time with each other, to share themselves and get to know others. They appreciate learning about differences and similarities among their teammates and the opportunities to celebrate each other. These activities and related discussions also identified important opportunities to improve the climate and experience of some staff populations, addressing topics such as visible/invisible disabilities, gender identity, and how to be an effective bystander. Staff also reported feeling more positive and united with their teams, which fostered a greater sense of belonging.

Positive Energizer 90/90 Challenge
For the last two and a half years, our culture efforts have largely and intentionally focused on engaging B&F leaders -- establishing shared ownership and accountability, as well as equipping leaders with the skills, tools and support they need to be agents of culture change in their own departments and teams. This year, to further support the efforts of our leaders, we initiated a companion “ground up” culture change initiative by engaging more than 160 staff influencers. Called “positive energizers,” these influential staff were first challenged to complete the “B&F 90/90 Challenge,” from January 15 to April 15. They were asked to reach 90% of B&F’s 2,700 staff in 90 days with information about our goals to create a positive and inclusive organization and engage them in a related activity. They also encouraged employees to personally commit to
making a 1% positive change and contribute to creating a more positive and inclusive work environment.

The effort was a huge success. As of April 15, 2020 (the end of the initial challenge), positive energizers (PEs) reached more than 90% of B&F staff and engaged them in hundreds of activities designed to build stronger relationships, connect teams to purpose, understand differences, build team, have fun and otherwise create positive emotions. According to anecdotal feedback from PEs and their colleagues, these efforts resulted in people feeling more included, more positive, and less stressed. As one of our custodial staff said, "There [has been a] shift from the negative toward the positive. People are giving and receiving more respect." Managers shared that their employees were talking more, getting along better and helping each other more. The PEs’ work became particularly invaluable to supporting a positive and inclusive culture after COVID-19 hit, which happened in the middle of the 90/90 Challenge.

To support the PEs, we created central infrastructure and provided numerous resources. To begin, all the PEs went participated in a half day training with EVPCFO Kevin Hegarty, professor Kim Cameron and business consultant Jim Mallozzi, who shared information about positive organizational scholarship, B&F’s culture goals, and how the PEs could achieve success in the 90/90 Challenge. We created a comprehensive MBox of resources and tools the PEs could use and established a PE Workplace group so they could share ideas with each other. In addition, we sent weekly emails to the PEs that included resources to share with colleagues, a weekly “PE Digest” that summarized what the PEs were doing across B&F, and also included encouragement and appreciation for the PEs themselves. To promote and magnify this effort across B&F, we created four videos: a kickoff and introduction video featuring the EVPCFO, a promotional video, a halfway mark video, and a celebration video and shared them with all B&F staff. The EVPCFO highlighted the PEs regularly in his weekly all-staff emails and we produced feature stories about the PEs on the B&F website.

While the initial 90/90 Challenge is complete, the PEs are now working with their local leadership to continue their efforts to create positive emotions, engage their colleagues and drive culture change. Recently, we engaged a team of undergraduate students participating in the Center Positive Organizations’ Magnify Program to study the PE efforts and provide recommendations on how we can increase and build upon this important work.

**B&F’s Response to COVID-19**

Because of all the work B&F does to Make Blue Go, B&F leaders and staff were very active in the university’s response to the COVID-19 crisis. B&F leaders were integral in advocating, creating and implementing a wide-variety of policies and practices to support the university through the pandemic, while also supporting employee populations who may be more vulnerable. B&F leaders did their best to consider equity in the decision making and managing of the university’s resources, including B&F employees. Just a few examples the ways B&F responded to COVID-19 in support of the university (external-facing) and in support of our own staff and culture (inward-facing) are below.
University-facing (external) responses:

- F&O staff were involved in building negative pressure rooms in Michigan Medicine’s hospital and worked to ensure a safe work environment, not only for healthcare workers, but also for the university’s essential staff who remained on campus.
- Finance worked to address the many facets of the university’s financial situation from securing the highest credit ratings available and issuing a $1-billion bond to ensuring seamless payroll service for our employees to keeping small and minority owned businesses, among others, in mind as purchase orders and inventory needs changed.
- UHR quickly created new policies and procedures to address the needs of all U-M employees, such as COVID-19 time banks, voluntary furloughs, benefits modifications, childcare assistance, and many others. They also established the “We Are All in This Together” campaign to support employee wellbeing.
- SSC changed policies and practices to create fully electronic processes and secure data transmission for all financial and HR transactions. They also supported the urgent need for new suppliers, vouchers and payments for PPE and other critical supplies at Michigan Medicine.
- B&F senior leaders advocated for staff, especially those most vulnerable, in policy and practice discussions/decisions for B&F and the university at large.

B&F-facing (internal) responses:

- B&F supported its staff with the equipment and resources needed to work from home wherever possible.
- B&F honored as many voluntary furlough requests as possible, working with each employee to make sure they were doing what was best for them and their families and benefiting from the arrangement.
- F&O promptly implemented, trained, and communicated about public health best practices. Starting May 7, all F&O staff were required to complete training developed by EHS covering COVID-19 symptoms, how to avoid spreading the disease, and how to properly use a mask. Shortly before daily screening was required by the State of Michigan, we developed simple electronic tools for staff to self-screen for COVID-19 symptoms or exposure to a confirmed case. Leadership messages reiterated practices to keep staff and the people they care about safe, including social distancing, personal hygiene, face coverings, staying home when sick, and monitoring for symptoms.
- Kevin Hegarty, the EVP CFO, made several home videos to express gratitude and appreciation to specific B&F essential teams working on campus. These videos fostered a sense of purpose and helped make essential workers feel valued for their work on the frontlines to support the university during the crisis.
- The Positive Energizers worked to make all employees on their teams, whether working from home or on campus, feel appreciated and included.
- We created resources to support especially vulnerable staff populations, including frontline workers and those who fall into lower socioeconomic status.
- As B&F teams responded to COVID-19 and supported the university community in myriad ways, we launched a communications effort to recognize the tireless efforts of our staff. Under the theme “Look for the Helpers,” we highlighted the critical work of more
than 34 teams, supported video messages from Kevin to personally thank specific teams, and celebrated our positive energizers’ efforts to lift their teams.

- Our cross-departmental communications team also collaborated with UMSocial on a campaign to recognize essential staff, which included features on numerous B&F employees. All of our COVID-19 communications efforts were featured on our B&F website and were promoted in Kevin’s weekly all-staff emails.

**DEI Plan Impact Since Launch**

Over the last four years, DEI has become interwoven into the B&F culture in many ways. For example:

- Across B&F there is an effort to mitigate bias in the talent acquisition process and hire more diverse candidates. To support this effort, the Unconscious Bias in Hiring & Selection training is mandatory for all hiring managers in most B&F areas. It is also required for all search committee members recruiting for executive level B&F positions, including those members who are not part of B&F.
- DEI topics are a natural and common topic at our B&F Leadership Forums and leaders are talking with their teams about DEI topics regularly. For example, for many years most teams in F&O have begun their weekly staff meetings with a safety tip. Now in addition to the safety tip, many of those teams have added a DEI tip.
- The top two levels of leaders (below the EVPCFO) are now required to set culture-specific goals each year, as well as goals related to their own development as a positive and inclusive leader. Progress on these goals are evaluated as part of their performance reviews.
- For the last few years, we have been tracking on nine metrics from the University’s 2017 Climate Survey, which were selected by B&F leadership to measure progress on our culture goals over time. Called our “key nine” we not only include them in our employee engagement survey, but also in our event/activity tracking, leadership surveys, and many of our specific group surveys. Language and conversation around the “key nine” has been normalized in our culture. (See Supplemental Section for list of “key nine.”)
- DEI activities and events are a frequent occurrence in B&F and fully supported and attended by leadership. Each year staff participate in a wide variety of events and activities, and they are a highlight of B&F’s effort to promote DEI.
Strategic Objectives, Measures of Success and Action Plans*

Business & Finance is comprised entirely of staff and thus reflects the sole constituency of this plan. Except where specified, the plan pertains to all B&F staff.

We have identified a limited number of strategic objectives to further the university-wide goals of diversity, equity and inclusion within B&F. These have been aggregated into the three domains determined by the university. Each of these strategic objectives is accompanied by updated actions for Year Five that we will take to accomplish those objectives, along with corresponding measures of success.

Five-Year Strategic Objectives

A. Recruitment, Retention and Development
   A1. Enhance career path development and advancement opportunities.
   A2. Cultivate an inclusive and diverse applicant pool and attract and maintain a diverse staff.

B. Education and Scholarship
   B1. Continue to build and track the cultural competency of B&F staff, managers, and supervisors.
   B2. Educate our community on sexual and gender-based misconduct prevention in an effort to promote a safe and supportive environment for all members to work, learn, and thrive.

C. Promoting an Equitable and Inclusive Community
   C1. Commit to improve the B&F culture related to diversity, equity and inclusion by building awareness of the university’s commitment.
   C2. Build a more inclusive cross-functional community within B&F via events, communication and establishing routinized mechanisms to solicit and respond to ongoing employee engagement.
   C3. Maintain robust and systematic accountability systems and techniques for conflict identification and resolution (including discrimination, bias, harassment, inequity).

For additional detail on assignments, timelines and accountabilities, see Action Planning Tables, page 21.

*All strategic objectives and related actions will be pursued in accordance with the law and University policy.*
Goal-related Metrics

Data on demographic composition and climate survey indicators for staff are provided from the Office of Diversity, Equity & Inclusion in the annual DEI Metrics reports and those categories are listed below. Initial data were collected campus wide from the climate survey during Years One and Two, and was included in the first release of the DEI Metrics report in summer 2018; these data will once again be collected in Year Five.

Demographic Composition:
- Headcount
- Race/ethnicity
- Sex
- Age (Generation cohort)

Climate Survey Indicators:
- Satisfaction with unit climate/environment in work unit
- Assessment of semantic aspects of the general climate in work unit
- Assessment of semantic aspects of the DEI climate in work unit
- Feeling valued in work unit
- Feeling of belongingness in work unit
- Assessment of work unit commitment to diversity, equity, and inclusion
- Perceptions of equal opportunity for success in work unit
- Feeling able to perform up to full potential in work unit
- Feelings of professional growth in work unit
- Feelings of discrimination in work unit

In addition to the list above, B&F is tracking on these climate survey indicators:
- Feeling that ideas are considered in work unit
- Feelings of inclusion in decision-making in work unit
- Feeling respected in work unit
### A. Recruitment, Retention and Development

<table>
<thead>
<tr>
<th>Strategic Objective</th>
<th>Detailed Actions Planned (measurable, specific)</th>
<th>Measures of Success</th>
<th>Group/persons accountable</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>A1.</strong> Enhance career path development and advancement opportunities.</td>
<td><strong>REVISED</strong> A1.1 B&amp;F will continue to explore and implement strategies to support career/professional development for staff at all levels, drawing on tools such as the Development Journey, DEI Lifelong Learning and Leadership Expectation models developed by the Department of Organizational Learning to guide this work where possible. On-the-job development opportunities for staff will be explored and implemented.</td>
<td><strong>REVISED</strong> Career/professional development for staff at all levels is explored and strategies to support career/professional development are implemented. Program developed to support managers holding career development conversations with their staff and development resources provided. Program piloted with a select group of B&amp;F managers and their staff.</td>
<td>Leads: BFHRS Consultants: Training &amp; Development working group, DOL</td>
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<td><strong>REVISED</strong> A1.2 B&amp;F will continue to evaluate and refine succession planning practices, generally and with key positions.</td>
<td>Succession planning strategies reviewed and evaluated; key positions identified and conversations about succession planning for those positions held.</td>
<td>Leads: B&amp;F Senior Staff, BFHRS</td>
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<td>A1.3 Consider recommendations for workplace flexibility opportunities for staff; develop implementation plan.</td>
<td>B&amp;F areas will evaluate workplace flexibility options put into place during the COVID-19 crisis to determine which, if any, should/could be continued in support of U-M's safety and sustainability goals, to provide for employee work life balance and to promote employee engagement.</td>
<td>Leads: B&amp;F Senior Staff Consultants: B&amp;F HR Directors</td>
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<td><strong>A2.</strong> Cultivate an inclusive and diverse applicant pool</td>
<td><strong>REVISED</strong> A2.1 Investigate talent acquisition and talent management practices and consider changes to the process</td>
<td>Investigation into talent acquisition and talent management practices using 10-year data trends</td>
<td>Leads: B&amp;F Senior Staff</td>
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and attract and maintain a diverse staff. that may better support B&F’s commitment to a diverse workforce. Continue to provide Unconscious Bias-Hiring & Selection training to new B&F hiring managers and hiring committees for leadership positions.

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<th>A2.2 Based on analysis of current process used to identify and select apprentices, utilize recommendations developed by working group in FY19 for new hires.</th>
<th>Recommendations continue to be implemented and/or additional recommendations implemented and tracked.</th>
<th>F&amp;O</th>
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<td>A2.3 Select B&amp;F areas will continue to develop new, or review existing, orientation and onboarding processes for new employees, looking for ways to make the processes more welcoming and inclusive, with a potential emphasis on remote workers.</td>
<td>Processes analyzed in select B&amp;F areas; new and/or updated processes recommended and/or implemented.</td>
<td>Leads: BFHRS</td>
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Consultants: B&F HR Directors
## B. Education and Scholarship

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<tr>
<th>Strategic Objective</th>
<th>Detailed Actions Planned (measurable, specific)</th>
<th>Measures of Success</th>
<th>Group/persons accountable</th>
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| **B1.** Continue to build and track the cultural competency of B&F managers, supervisors and staff. | B1.1 Use climate survey, employee engagement survey, and other data to develop a customized education and learning plan to address issues within the microclimates of the B&F areas. | Customized education and learning plan created and implemented for each B&F area. | Leads: BFDWG  
Consultants: DOL  
Inform: BFHRS |
|                     | B1.2 Continue to garner high-level themes of feedback supervisors/managers are providing related to the questions, "In what ways have you supported your own or the development of your staff related to DEI?" and "What DEI-related activities have you found most effective?" | Themes of feedback collected and used to inform future planning.                     | Leads: B&F Senior Staff                        |
| **NEW B2.** Educate our community on sexual and gender-based misconduct prevention in an effort to promote a safe and supportive environment for all members to work, learn, and thrive. | **NEW B2.1** Support central efforts to educate faculty, staff, and students on the forthcoming University of Michigan Policy on Sexual and Gender-Based Misconduct Prevention ("umbrella policy"). | **NEW** Develop and implement a communication plan to distribute the upcoming U-M Policy on Sexual and Gender-Based Misconduct Prevention ("umbrella policy") to B&F leaders and staff. | Leads: BFHRS |
|                     | **NEW B2.2** Develop and socialize unit-specific value statements that align and reinforce the forthcoming university level values that promote culture and climate change consistent with both the Diversity, Equity & Inclusion, and Sexual and Gender-Based Misconduct Prevention work that is already underway. | **NEW** B&F value statements developed and communicated.                            | Leads: B&F Senior Staff and BFHRS              |
C. Promoting an Equitable and Inclusive Community

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<th>Strategic Objective</th>
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<td>C1. Commit to improve the B&amp;F culture related to diversity, equity and inclusion by building awareness of the University’s commitment.</td>
<td>C1.1 Include questions in our Employee Satisfaction Survey to gauge employee awareness of our commitment to DEI, and track changes in awareness levels over time. Continue to implement plan to increase awareness of B&amp;F’s commitment to diversity, equity and inclusion through regular communications and by encouraging leaders to promote our commitment to DEI among their teams.</td>
<td>Increased staff knowledge of our commitment to DEI and increased promotion among leaders.</td>
<td>Leads: B&amp;F Comm Team&lt;br&gt;Consultants: BFDWG, B&amp;F Comm Directors</td>
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<td>C1.2 Continue to monitor awareness of B&amp;F upper management, regarding their knowledge of the B&amp;F DEI plan, to ensure awareness and related activity remains high.</td>
<td>Awareness and activity monitored through follow up assessment.</td>
<td>Leads: B&amp;F Senior Staff&lt;br&gt;Consultants: B&amp;F Leadership Forum Planning Committee</td>
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<td>C2. Build a more inclusive cross-functional community within B&amp;F via events, communication and establishing routinized mechanisms to solicit and respond to ongoing issues</td>
<td>C2.1 Implement at least one engagement mechanism in each area within B&amp;F (such as town halls, diversity cafes, etc.) to raise awareness of diversity, equity and inclusion issues.</td>
<td>Engagement activities conducted; evaluations completed and staff awareness measured.</td>
<td>Leads: BFDWG</td>
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<td>C2.2 B&amp;F senior leadership will continue to conduct team site visits, hold cross-departmental activities and otherwise take steps to get to know staff and the work they do, promote a positive organizational culture and give staff access to leadership.</td>
<td>Leadership conducted events and other outreach to staff.</td>
<td>Leads: B&amp;F Senior Staff&lt;br&gt;Tracking overseen by: BFDWG</td>
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<td>employee engagement.</td>
<td>C2.3 Continue to refine and implement a comprehensive communications plan designed to promote an inclusive organizational culture, with a particular emphasis on highlighting efforts across the organization to create a line of sight for B&amp;F staff that connects their roles to the university's mission impact; begin implementation of the plan.</td>
<td>Continue working the plan.</td>
<td>Leads: B&amp;F Comm Team</td>
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<td>C3. Create and maintain robust accountability and self-assessment systems and techniques for conflict identification and resolution (including discrimination, bias, harassment, inequity).</td>
<td>REVISED C3.1 Promote awareness of the current policies and mechanisms available to report, investigate and resolve conflicts relating to identity harassment, unlawful bias, discrimination, bullying.</td>
<td>Continue to promote the resource FAQ and the Office of the Staff Ombuds. Distribute this information widely during the Employee Engagement Survey.</td>
<td>Leads: B&amp;F Comm Team Consultants: OIE, Staff Ombuds</td>
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Plans for Supporting, Tracking and Updating the Strategic Plan

To ensure we have the right infrastructure in place to support the action items in the Year Five plan, the following resources are in place to support implementation of the plan:

- Amy Bunch, DEI Implementation Lead (35% FTE)
- Tina Jordan, DEI Implementation Lead (60% FTE)
- The five groups mentioned earlier in this report:
  - B&F Diversity Working Group
  - B&F Communications Team
  - B&F Human Resources Steering Group
  - EVPCFO Senior Staff
  - Lead Trainers from B&F areas, in those that have them

The DEI Implementation Leads will provide the project management support to drive the action items to completion. They will provide a mid-year progress report on the plan to the EVPCFO Senior Staff in January-February 2021. In addition, they will coordinate a final evaluation and assessment of Year Five and lead a process to develop plans in accordance with the university’s guidelines for Year Six.
Supplemental Section