INTRODUCTION & BACKGROUND

This year, every department will submit an Engagement, Inclusion and Diversity Plan (EID) for 2015 to AVC, Elvey. This expectation was established following a division-wide review and feedback exercise conducted regarding the 2014 EID survey results with the development of the FP&M’s EID Plan. That work made clear the value of moving the majority of AVC-EID sub-committees up to the division level. They are no longer under the Office of AVC but deemed appropriate for all FP&M. The sub-committees that moved up to division-wide implementation are: Onboarding, Communication and Suggestion Box.

Informed by findings from the EID survey and efforts made during 2013-2014, there are two major shifts regarding EID initiative within the Office of AVC.

1. 2015 Update to the AVC-EID Plan will focus on the division’s seven EID priorities as they relate to all AVC employees; and

2. It has been recommended the AVC-EID Team be Ad Hoc in nature, assembling as needed with specific topics to address, and that this be in lieu of a standing AVC-EID Team.

EID planning is a widespread effort designed to involve numerous AVC employees. In the course of the work, AVC employees have contributed to the development of the 2015 Update to the AVC-EID Plan. Some attended the FPM-EID Plan Workshop and started drafting the departmental EID Plan. Additional AVC employees attended several AVC-EID Plan Workshops to explore, refine and identify strategies in advancing the seven priorities within the Office AVC. These Ad Hoc AVC-EID Team members included Caroline Benforado, Ken Dvorak, Zack Haak, Liz Hammen, Sally Hansen, Jeannette Jolicoeur, Shoko Miyagi (co-facilitator), Brianna Quam, Pat Richards, Don Schwoerer, Tamera Stanley (co-facilitator) and Cindy Wempner.

This document is a collective work of positive group process which created a ‘living’ document receptive to continuous improvement. It embodies our shared responsibility to create a workplace that encourages staff engagement and promote the principles of inclusion and diversity in our own work units.

AVC-EID TEAM STRUCTURE

- The “AVC-EID Team” formed in May of 2013 consisted of representatives from each functioning area. In 2015, the Office of AVC will support the idea of “Ad Hoc AVC-EID Team.” The structure for the Ad Hoc Team will be fluid and the participation will vary. Format of participation might include, but is not limited to, focus groups, open forums, or drop-in meetings, where any AVC employee can participate and convey ideas when needs arise.

- Ad Hoc AVC-EID Team:
  o Executive Sponsor(s): Bill Elvey & Margaret Tennessen with FPM EID Team reps, Shoko Miyagi & Liz Hammen.
  o Scope: Support activities performed by AVC employees in implementing the divisional EID Plan. Support EID activities that are unique to AVC Office.
  o Goals/Deliverables: Come together as a group 2~3 times a year in order to: (1) collect input from AVC employees and feed input back to the various EID Work Teams as necessary and (2) review progress of the AVC-EID Plan. During the EID Survey year, come together as a group in order to assist Executive Sponsors by: (3) making recommendations for survey sharing process and (4) submitting the AVC-EID Plan.
  o Facilitator(s): In addressing goals/deliverables # (1), facilitator(s) will be AVC employees serving on the various EID Work Teams. In addressing goals/deliverables # (2), (3) and (4), facilitator(s) will be appointed by Executive Sponsors.
  o Members: Members will vary depending on specific goals/deliverables.
SUPPORT 7 FPM-EID PRIORITIES

(1) DIVERSITY RECRUITMENT AND RETENTION
• FP&M HR Office will provide the framework, best practices and recommendations in diversity recruitment and retention for the entire FP&M Division.
• AVC Office will strive to champion the diversity recruitment and retention efforts.
• Build off new freedoms with HR Design. FP&M HR employees, Directors and hiring supervisors will work together in establishing multiple targeted EID Work Teams.
• HR Design will determine new processes and these new processes will be documented.
• Raise awareness through training workshops – bias education (WISELI), EID workshops, etc.

(2) ONBOARDING
• AVC employees participate on the divisional Onboarding Work Team.
• Contribute ideas to the Onboarding Work Team via AVC employees who are on that team.
• Interview AVC supervisors to collect and determine departmental content.
• Develop department/unit-specific onboarding content for specific jobs.
• Identify AVC onboarding coordinator if necessary.

(3) PERFORMANCE REVIEWS
• AVC employees participate on the divisional Performance Management Work Team.
• Contribute ideas to the Performance Management Work Team via AVC employees who are on that team.
• FP&M Training and HR employees provide support to divisional process by developing pilot training program for AVC supervisors on performance management process.
• FP&M HR Office will pilot the new performance evaluation form process.
• AVC Office will support and adhere to guidelines set by the Performance Management Team (i.e. completion in a timely manner, using correct/updated format, etc.).

(4) MANAGER AND SUPERVISOR TRAINING & (5) DEVELOP INTERNAL TALENT
• Support various training workshops available to supervisors (e.g. workshops on Engagement, Inclusion and Diversity, Principles of Supervision & Management, APPA Supervisor’s Toolkit, and FP&M Aspiring Supervisor Training, etc.).
• Offer Stephen Covey’s training (i.e. APPA’s Leadership Academy Track One) to non-supervisors to address priorities 4, 5, and 6 (offer on voluntary basis or nomination process for employees of the AVC Office).
• Promote various tuition reimbursement opportunities (Office of Human Resources & Classified Staff Executive Committee). Use brown bag sessions and other means to communicate tuition reimbursement policies and procedures.

(6) RECOGNITION
• Ask AVC employees about how they want to be recognized through staff meetings.
• Gather more information to better understand the survey scores around recognition.

(7) COMMUNICATION
• AVC employees participate on the divisional Communication Work Team.
• Encourage supervisors to share information on staff transitions (e.g. resignation, retirement, etc.).
• Develop HR website. Aim to launch a couple of pages within the HR site by certain date. Determine the lead HR person to work with Communication Specialist.
• When there are changes in policies, procedures and processes to communicate to all FP&M (e.g. HR Design, new FP&M policies, new pieces of information, etc.), encourage AVC employees to use as many methods of communication as possible. This might include staff meetings, newsletter, flyers on bulletin boards, brown bag sessions, training sessions, and websites as well as email notification.
SUPPORT 7 FPM-EID PRIORITIES

(7) COMMUNICATION – cont’d

- Break down silos. Examples might include the following ideas:
  - Use 3 survey work units (i.e. HR, BOP and General) when determining Work Team representatives.
  - AVC employees contribute to FPM newsletter. Feature different AVC areas. Promote the idea of “featuring units” to inform others (i.e. what we do, where we are located, etc. Photos might be nice to include).
  - Within AVC Office, aim to host 3~4 brown bag sessions a year. Different survey work units may host brown bag sessions to inform other AVC employees about staff changes, policy/procedure changes, as well as informing what each employee does and how we fit together. These sessions aim to increase departmental interaction and learn what fellow colleagues do.
  - Within AVC Office, aim to host 2 social events a year in order to get to know other employees. Form a planning team annually. Select representative(s) from each survey work unit. Ideas include but are not limited to the following:
    - Getting together at the Memorial Union Terrace;
    - Bowling tournament at Union South;
    - Picnic on the Picnic Point, Muir Woods, or lakefront

ACCOMPLISHMENTS

<table>
<thead>
<tr>
<th>Actions Implemented</th>
<th>Resources Taken</th>
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<tbody>
<tr>
<td>1. Hired a Communication Specialist.</td>
<td>• AVC &amp; Deputy to create a brand new position.</td>
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<td>2. Important news is emailed directly to employees.</td>
<td>• The Communication Specialist to overhaul existing email distribution list for AVC Office.</td>
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<tr>
<td>3. Newly updated FP&amp;M homepage launched.</td>
<td>• The Communication Specialist to overhaul existing website. Worked with each dept director &amp; AVC.</td>
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<tr>
<td>4. Newly updated FP&amp;M Newsletter launched for sharing important information &amp; staff spotlights.</td>
<td>• The Communication Specialist working with AVC, Deputy and other column contributors.</td>
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<td>5. Continually update websites.</td>
<td>• Leadership Team to work with Communication Specialist.</td>
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<td>6. “Bill’s Meet and Greet” for all FP&amp;M employees became annual events.</td>
<td>• Directors/AVC to devote time &amp; energy to communicate important institutional information.</td>
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<td>7. Increased AVC all staff meetings.</td>
<td>• AVC-EID planning committee to execute logistics during 2013-2014.</td>
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<td>8. Started emailing job vacancy announcements directly to employees.</td>
<td>• Deputy to work with FP&amp;M Human Resources.</td>
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<td>9. Established FPM-Suggestions Box.</td>
<td>• Build on various departmental Suggestion Box programs.</td>
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<td>10. Used effective recruitment process for HR Director position.</td>
<td>• Training sessions through WISELI. Hiring committee &amp; Deputy to work together.</td>
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<td>11. Established processes for writing FP&amp;M policies.</td>
<td>• Deputy to work with HR to establish policy writing processes.</td>
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<td>12. Employee group now has an opportunity to review policies before they get published.</td>
<td>• Deputy to form an employee review group, Policy Advisory Review Group (PARG).</td>
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<tr>
<td>13. Continually establish division-wide policies.</td>
<td>• Policy drafter, Leadership Team &amp; PARG to work together.</td>
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BACKGROUND HISTORY

Summer, 2012
- FP&M employees took the EID survey. The overall response rate of FP&M was 40%.
- Associate Vice Chancellor (AVC), Elvey joined FP&M in September.

Spring, 2013
- The FPM-EID Team was formed in January.
- The draft FPM-EID Plan was submitted to VCFA, Bazzell in March. Finalized in July.
- The 2012 EID survey results were shared with all BASS (Business & Staff Services) staff in April.
- The BASS-EID Team was formed in May in response to the request of the former Deputy, Steele.

Summer, 2013
- The BASS-EID Team examined the 2012 survey results and drafted the BASS-EID Plan.
- The plan was submitted to AVC, Elvey in August.

Fall, 2013
- AVC, Elvey made organizational changes to move all services provided by BASS to the Office of the Associate Vice Chancellor in September.
- The BASS-EID Plan became the AVC-EID Plan and was shared with all AVC staff in October.
- The former AVC Deputy, Steele retired in October.
- Five AVC-EID sub-committees were formed to implement the AVC-EID Plan.

Spring, 2014
- The new Communication Specialist, Hammen joined FP&M in January.
- The new Deputy, Tennessen joined FP&M in April.
- The AVC-EID sub-committees continued with their projects (e.g. staff meeting planning, communication, suggestion box, onboarding, etc.).

Summer, 2014
- FP&M employees took the 2014 EID survey in July. Aimed to get over 80% response rates.
- The overall response rate of FP&M was 85% (949 responses out of 1117 survey distributed).

Fall, 2014
- The FP&M overall scores of 2014 survey were shared with the FPM-EID Team and Leadership Team in September.
- The FP&M and AVC survey scores were shared with all AVC employees in October.
- The AVC individual unit scores were shared with all AVC unit staff in November and December.
- The FPM-EID Plan (2014 Update) was submitted to VCFA, Bazzell in December.
- Suggestion Box was implemented at the divisional level in December. Boxes are now available at different buildings for all FP&M employees.

Spring 2015
- Two work teams began working on EID priorities for Onboarding and Performance Reviews in January.
- AVC, Elvey requested each departmental EID Plan be submitted by end of March.
- The FPM-EID Plan (2014 Update) was shared with all AVC staff via email communication in February.
- The FPM-EID Workshop was held in February to start drafting the departmental EID Plan.
- Several AVC-EID Plan Workshops were held to collect input from additional AVC employees in March.
- 2015 Update to the AVC-EID Plan was submitted to AVC, Elvey on March 31, 2015.

DEFINITIONS

- AVC: Associate Vice Chancellor, Bill Elvey
- AVC-EID Team: Departmental EID Team for Office of the Associate Vice Chancellor
- EID: Engagement, Inclusion and Diversity
- EID Work Teams: Project teams sponsored by AVC, Elvey and Deputy, Tennessen. There are currently two EID Work Teams working to implement two of the seven divisional EID priorities.
- FP&M EID Team: Divisional EID Team for Facilities Planning and Management
- VCFA: Vice Chancellor for Finance and Administration, Darrell Bazzell

NOTE: Refer to AVC-EID Plan’s Appendix.
The following Ad Hoc AVC-EID Team assisted AVC, Elvey and Deputy, Tennessen with distribution of AVC survey results during fall of 2014.

- Zack Haak
- Liz Hammen
- Jeannette Jolicoeur
- Shoko Miyagi
- Tamera Stanley

This document was developed and submitted by the following Ad Hoc AVC-EID Team on March 31, 2015. This is in response to the 2014 EID Survey results for Office of Associate Vice Chancellor.

- Caroline Benforado
- Ken Dvorak
- Zack Haak
- Liz Hammen
- Sally Hansen
- Jeannette Jolicoeur
- Shoko Miyagi (co-facilitator)
- Brianna Quam
- Pat Richards
- Don Schwoerer
- Tamera Stanley (co-facilitator)
- Cindy Wempner

The following page visually describes various groups working to advance EID initiative.
**EID Organizational Chart**

- **Vice Chancellor for Finance & Administration** (Darrell Bazzell)
- **Associate Vice Chancellor for Facilities Planning & Management** (Bill Elvey) & Deputy (Margaret Tennesen)

**FPM EID Team**
- Teresa Adams (CPD), Anne Bogan (TS), Liz Hammen (AVC), John Hanson (PP), Margaret Maly (PP), Shoko Miyagi (AVC), Rebecca Moritz (EHS), Dan Okoli (Chair), Laura Peterson (TS), Rob Shively (SMO), Top Tantivivat (CPA), Margaret Tennesen (Ex Officio)

**FPM EID Plan**
- Seven EID priorities:
  1. Diversity Recruitment & Retention
  2. Onboarding
  3. Performance Reviews
  4. Manager & Supervisor Trainings
  5. Develop Internal Talent
  6. Recognition
  7. Communication

**AVC EID Team**
- Dan Okoli (Chair), Matt Collins, Julie Grove, Ann Hayes, Pete Heaslett, Stu LaRose, Megan McBride

**CPD EID Team**
- Gary Brown, Top Tantivivat

**CPLA EID Team**
- Donna Carlson, Jon Haas, Rebecca Moritz (Team Lead), Don Siebert, Carrie Smith, Brent Wallace, Jessica Williams

**EHS EID Team**
- Client Services Team:
  - Nick Bergmann, Molly Cooper, Kristin Foulad
  - Nancy Helgesen Lyons, Silvie Marlette, Cindy Statz
  - Custodial Team:
    - Juan Antonio Horido, Rosalino Chavez, Ghorpa Dhorup, Hector Guzman, Brad Marta, Kevin Peine, Brian Petri, Laura Rogers, Steve Sorensen
  - Shop Team:
    - Richard Ferron, Monte Haufle, Courtyard Manager, Jerry Haufle

**Client Services Team**
- Michelle Bacon, Lee Bikke, Anne Bogan, Sue Frame, Kim Henderson (Team Lead), Jill Keller, Kate Moran, Sandhya Patel, Melanie Smith, Richard Valdes

**Communication Team**
- (AVC co-chair)

**No work teams yet:**
- Diversity Recruitment & Retention
- Manager & Supervisor Trainings
- Develop Internal Talent
- Recognition

**EID Survey**

**Plan**

- Pre-Survey Communication
- Survey Event Hosting
- Submit Division EID Plan

**Goals & Deliverables**
- (Divisional)
  - Develop Internal Talent
  - Diversity Recruitment & Retention

**Goals & Deliverables**
- (Departmental)
  - Performance Management Team (began Feb-2015)
    - Teresa Adams (CPD), Ellen Agnew (PP), Chris Bruns (PP), Kim Henderson (TS), Stephanie Kutz (EHS), Marcella Otter (PP), Christy Plautz (AVC), Brianna Quam (AVC co-chair), Rob Shively (SMO co-chair), Top Tantivivat (CPA)

**Implement**

**EID Work Teams**
- Onboarding Team (began Feb-2015)
  - Aaron Agnew (PP), Anne Bogan (TS), Rhonda James (CPLA), Jenna Klinner (EHS), Brent Lloyd (SMO), Shoko Miyagi (AVC co-chair), Pat Richards (AVC), Frankie Schneeborg (PP), Dan Stanford (PP), Tamera Stanley (AVC co-chair)

**AVC EID Plan Appendix**
- Developed by Ad-Hoc AVC-EID Team; last updated in April, 2015