

Division of Finance and Administration

**Diversity, Equity & Inclusion
Action Planning Workgroup**

**FY23-26 Action Plan
and Final Report**

December 2022



Oregon State University
Finance and Administration

DEI Action Planning Workgroup Final Report

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Message from the Co-chairs

Dec. 6, 2022

To Vice President Mike Green, division senior leaders, employees of the Division of Finance and Administration, and the OSU community:

We are pleased to share this final report from the DFA's inaugural Diversity, Equity and Inclusion (DEI) Action Planning Workgroup. It includes the division's DEI Action Plan for fiscal years 2023-2026, as accepted by the DFA senior leadership team. The Division of Finance and Administration now has a clear set of actions that every DFA unit, team and individual employee can participate in developing and implementing over the coming years.

The action planning workgroup also worked with the senior leadership team to envision a successful transition to the division's ongoing support and implementation of the action plan. Details are included in this report.

We speak for everyone who served on the workgroup when we say how excited we are to have reached this point. The group worked hard together, learned a lot, and grew our individual understanding and skills. Now, we invite everyone in the Division of Finance and Administration to contribute to the division's collective DEI work—to increase and celebrate our diversity, to help every member of the division understand their unique contributions to our shared mission, to feel valued, and to have a sense of belonging on their team, in the division and within the broader OSU community.

It is our hope that this report is an inspiration to start or continue your own contributions and efforts. Page 10 offers the workgroup's vision for what a DFA culture grounded in equity could look and feel like. Several workgroup members provided testimonials about why they find DEI work to be meaningful (see Appendix A). You can also find some great resources for your own DEI journey on the DFA's [Inclusive Excellence](#) webpage.

Feel free to email dfadiversity@oregonstate.edu any time for more information or assistance.

With gratitude,

DEI Action Planning Workgroup Co-chairs

Tom Fenske
Director, Financial Strategic Services
Controller's Unit

Keahi McFadden
Executive Assistant to the Associate Vice President
University Facilities, Infrastructure and Operations

DEI Action Planning Workgroup Charge and Membership

Why the workgroup was formed

In summer 2021, Vice President Mike Green and the Division of Finance and Administration's senior leadership team identified a desire to do more to build a culture of belonging, collaboration and innovation within the division and across OSU. They wished that every employee across the division feels a sense of empowerment and belonging, and that every interaction that a student, faculty member or co-worker has with a DFA team is welcoming and supportive. To help achieve this, senior leaders set a goal to develop during fiscal year 2022 a slate of division-wide diversity, equity and inclusion actions for implementation in fiscal years 2023 through 2026, utilizing the Office of Institutional Diversity's [adaptive DEI strategic planning guidance](#).

The workgroup's charge

The workgroup was formally charged by Vice President Mike Green in late November 2021:

One of the Division of Finance and Administration's shared goals for fiscal year 2022 (FY22) was to "create and begin to implement a division-wide diversity, equity and inclusion (DEI) strategy for FY22-26" using the We Have Work to Do framework and the DFA Framework for Success performance metrics system. It is critical that the Division of Finance and Administration take more concrete actions to advance OSU's goal to create a culture of belonging, collaboration and innovation, and align with the university's plans for inclusive excellence.

Specifically, this workgroup will recommend a range of actions and activities that all division units can contribute toward, with a focus on:

- *Reviewing policies, standards and processes to remove barriers and expand access to DFA services;*
- *Increasing employee diversity through recruitment and retention strategies;*
- *Expanding inclusion, equity and a sense of belonging among current division employees, including a consideration of employee recognition programs;*
- *Increasing the impact of DFA employees' day-to-day work has on diversity, equity and inclusion goals at OSU.*

To achieve this objective, the division will utilize an adaptive planning process with the guidance of the Office of Institutional Diversity:

1. *Charge an action planning workgroup to oversee the process*
 - *Broadly representative of DFA (across organization, functions, roles)*
 - *Engage in shared learning about organizational change, equity, policy development*
 - *Conduct stakeholder outreach and collect input*
2. *Initiate the deliberative phase*
 - *Envision a future state for DFA animated by inclusive excellence*
 - *Engage in systematic inquiry to assess opportunities for growth and change*
 - *Design the DFA's diversity, equity and inclusion action plan*

By summer 2022, this workgroup will collaborate with the vice president and DFA senior leaders to develop a slate of division-wide diversity, equity and inclusion actions for FY2022 through FY2026. Following this work, the action planning workgroup will transition to a steering committee to sustain the iterative phase of the DEI action plan, implement actions, monitor progress, and incorporate learning to adapt actions and objectives.

The workgroup will initially spend time engaging in learning, so everyone has a shared understanding of terms and concepts, the basics of organizational change theories, and an idea of how policies can lead to inequities among people.

Early in the process, the workgroup will create a communication plan that includes community outreach and regular sharing of information. The workgroup will collect and analyze relevant data, including stakeholder input, division self-assessments, employee surveys, focus groups and institutional data. The workgroup will identify specific actions and proposed metrics for the division's DEI priorities that map to the Framework for Success.

Workgroup members will initially meet weekly. The committee co-chairs will meet monthly with the division's senior leadership team, and senior leaders will be invited to workgroup meetings as needed for discussion and decision-making. The vice president will provide some limited funding to facilitate the workgroup's meetings.

The workgroup's membership

Employees across the Division of Finance and Administration were invited to apply to serve on the DEI Action Planning workgroup, so that it would reflect the makeup of the entire division. With consultation and input from the workgroup co-chairs, division senior leaders and the Office of Institutional Diversity, Vice President Green selected workgroup members who broadly represented the DFA's units, functions, and organizational levels, and who expressed special skills or interest related to diversity, equity and inclusion. A representative from the Office of Institutional Diversity served as the workgroup's ongoing advisor.

The list below identifies everyone who participated on the DEI Action Planning Workgroup. Active membership evolved over the course of the year depending on employees' workload and capacity to serve. Appendix A offers statements from several workgroup members about why they volunteered to participate in the DFA's efforts to advance diversity, equity and inclusion at OSU.

Teresita Alvarez-Cortez, Acting Assistant Vice President, Strategic Diversity Initiatives, Office of Institutional Diversity (**workgroup advisor**)

Christine Atwood, Administrative & Diversity Manager; Procurement, Contracts & Materials Management

Machelle Bamberger, Hazardous Waste Safety Officer, Environmental Health & Safety

Kirsten Bradley, Project Manager, Enterprise Project Portfolio Management Office

Jonathan Champney, Buyer, Facilities Services

Kim Cholewinski, Academic Human Resources Officer, University Human Resources

Todd Cross, Landscape Manager, Facilities Services

Tracy Elmshaeuser, Executive Assistant to the Senior Associate Vice President for Administration

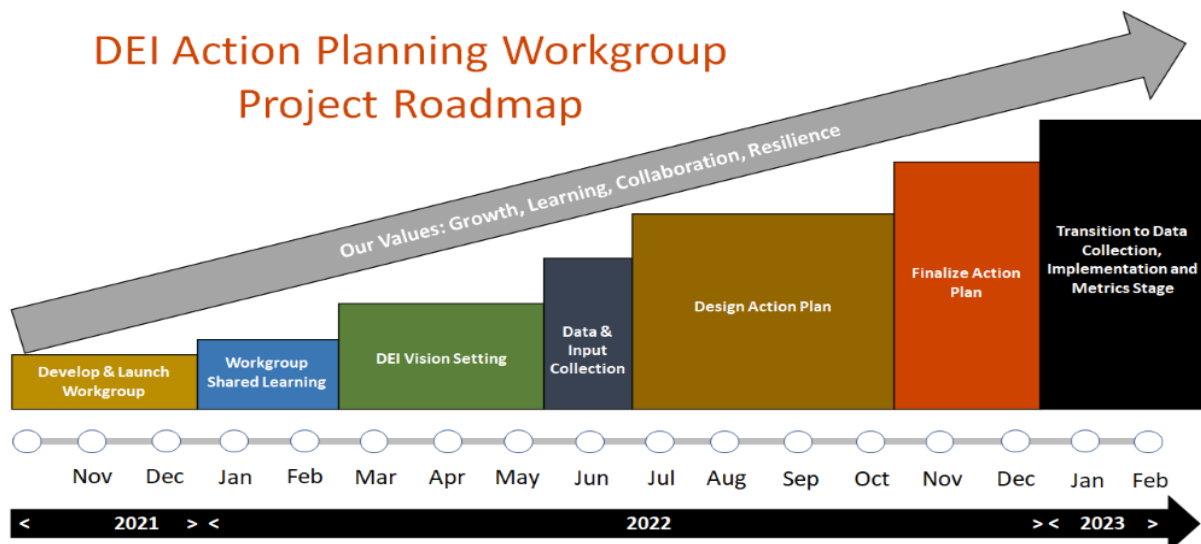
Tom Fenske, Director of Financial Strategic Services, Controller's Unit (**workgroup co-chair**)

Keith Foster, Insurance Contract Specialist, Insurance & Risk Management
Anne Gillies, Search Advocate Program Director, University Human Resources
Jessica King, Travel & Expense Support Specialist, Controller’s Unit
Mary Macy, Fiscal Coordinator 2, Financial Strategic Services, Controller’s Unit
Daniel Mahoney, Academic Liaison, University Human Resources
Keahi McFadden, Executive Assistant to Assoc. Vice President of University Facilities, Infrastructure & Operations (**workgroup co-chair**)
Christina McKnight, Director, Insurance & Risk Management
Melissa Medina, Retirement Officer, University Human Resources
Stephen Nelson, Chief Procurement Officer; Procurement, Contracts & Materials Management
Bob Richardson, University Land Use Planning Manager, Capital Planning & Development
Aviva Rivera, Financial Strategic Partner, Controller’s Unit
Melanie Rose, Manager of DFA Strategic Initiatives (**workgroup administrator**)
Justin Schaffer, Fiscal Coordinator 2, Financial Strategic Services, Controller’s Unit
Stephanie Smith, Fiscal Coordinator 2 / Travel Administrator, Controller’s Unit
Sudie Swader, Fiscal Coordinator 2, Financial Strategic Services, Controller’s Unit
Jane Waite, Senior Associate for Social Justice Learning & Engagement, University Human Resources
Ben Wessel, Senior Director, DFA Information Technology

Background and Preparation

Initial work plan

The workgroup co-chairs, administrator and advisor drafted an initial work plan that included time for workgroup members to come together as a team, develop working agreements and norms, engage in shared learning, establish a vision and design an action plan with input from DFA stakeholders and senior leaders. The workgroup established a communication plan that included regular engagement with DFA senior leaders and periodic updates to the community about the workgroup’s progress.



Advance preparation

Workgroup members began by making an agreement they called “Group Norms for Dialogue.” Following a discussion of people’s positive and negative experiences, workgroup members agreed to commit to learning from one another; to acknowledge that discrimination exists and may surface during conversations; to hold each other accountable and trust that all are doing their best; to commit to listening and learning; to treat group conversations as confidential; to challenge ideas rather than people; to acknowledge that this work may be uncomfortable sometimes; and to seek consensus on actions as much as possible.

Shared learning

Workgroup members engaged in education together, hosted by the Office of Institutional Diversity. Appendix B lists some of the specific materials referenced. Shared learning was an opportunity to build trust among the members and to hear different perspectives. Everyone has different ways of processing information based on personal history, culture, family status, economic status, orientation, and more. Therefore, each person had a different interpretation of the questions being asked and had an opportunity to reflect upon their own understanding and how they interpreted information differently than others did.

It was important for people to establish trust within the larger committee to be able to do this work effectively. Workgroup members worked on listening and building trust with one another, learned to view situations through a lens of horizontal structure, learned not to filter equity through the decision-making process, and how to reframe cultural barriers, recognize and assess them.

Through shared learning, the workgroup members established a mutual foundational understanding of diversity, equity and inclusion matters by reading articles, watching video lectures, and participating in a training provided by Jeff Kenney from the Office of Institutional Diversity to “help workgroup members apply change theory to the work of developing a change model” for the DFA.

Shared learnings resulted in these outcomes for the workgroup:

- Provided a common foundational understanding of DEI concepts to ensure everyone started from similar place in this work;
- Commitment to learning from each group member’s lived experience and knowledge;
- Pooled the group’s knowledge and ideas;
- Affirmed the value of each member’s contributions;
- Provided insights, knowledge and suggestions that others may not have seen or understood based on the siloed nature of DFA departments and individual lived experience;
- Put diversity, equity and inclusion into the perspective of organizational change—people considered how DEI work would fit into an organization and why it is important;
- Helped people see where DFA is at with DEI matters, for example looking at the current cultural make-up of the division;
- Helped workgroup members understand important considerations for the equitable and bias-free collection and use of data and information related to DEI.

Challenges and Opportunities

In discussing **what keeps the DFA from living its values and progressing**, workgroup members identified several challenges and opportunities.

- The need to help people overcome discomfort around discussing issues of diversity, equity and inclusion. People can be hesitant to contribute if they don't feel knowledgeable enough. We need to build capacity for conflict and difficult conversations.
- DFA employees hold a wide range of personal values and individual perspectives. There is a need to establish a collective (division-wide) perspective about what we are trying to achieve, the need for and value of DEI-related efforts, and how each of us can contribute to advancing a positive vision.
- The DFA consists of multiple units and subcultures, which currently makes it hard to have a set of shared values and experiences. We need to build a more collective division identity for employees, rather than focus just our individual units and roles. We lack bottom-up collaboration. There is a lot of individualism culture in DFA.
- The culture of DFA is highly business- and task-oriented, with little space or time in people's workday for contemplation of big-picture engagement.
- There is faith in the VPFA and it is clear he is committed to this work; however, this has not translated through the organization. There seems to be little accountability on this work down the line.
- People feel isolated/siloed from colleagues or removed from problems and are unsure about how they can contribute to advancing DEI matters.
- DFA employees are not expected to be experts in DEI vs. on the academic side, where that is expected. People underestimate our capacity. We should be expected to have expertise and capabilities.
- Some members of our division seem apathetic, and some may be antagonistic toward DEI efforts.
- There's no clear connection between DFA units and scarce resources, making for few opportunities for meaningful collaboration.
- The current lack of representation within the division makes it hard to attract and retain diverse employees and can make the workplace harder to navigate for underrepresented people.
- Change fatigue. DFA employees have been working to make progress on multiple significant priorities; they are tired and don't want to invest energy into something that they are not sure will end with real results.
- There is a lack of direction or focus and employees feel pulling in many directions at once.
- Lack of understanding by many white employees about people of colors' lived experiences with DFA and other university policies and practices.
- Some position classifications are overly prescriptive and seem to make it more difficult to hire a more diverse workforce.
- We engage in training and learning, but we need to translate that into more meaningful actions. We have not prepared people to confront and dismantle structural inequities.

The Workgroup's Vision

Why the workgroup needed a vision

The vision statement was the workgroup's North Star. It set the stage for the work the team set out to accomplish during the year and beyond 2022. The workgroup needed a vision to align what the Division of Finance and Administration currently represents and what it is committed to being in the future with OSU's vision, mission and values. The vision statement connected the workgroup's efforts to the Office of Institutional Diversity's [Plan for Inclusive Excellence](#) and [OSU's core values](#). It aligns with the goals of the division and, the hope is, every person who works in DFA. The vision statement is meant to be inspirational and actionable.

How the vision was drafted

Each workgroup member began this DEI planning work with varying degrees of knowledge, experience, understanding, and confidence. Drafting and agreeing on a vision statement was the workgroup's initial activity together and provided an opportunity to begin learning, sharing and asking questions.

Workgroup members spent several sessions creating the vision statement together. The work was slow and thoughtful and required consensus. Small teams were formed, where members identified the many functions and processes of DFA units, and then spent time discussing **what it looks like when equity is embedded** in those functions and processes. Co-chairs facilitated a process of synthesizing and refining the ideas into a cohesive vision statement.

Stakeholder feedback about the workgroup's vision

The workgroup was deliberate in designing a process to collect feedback from colleagues about its vision. Workgroup members identified the DFA's internal and external stakeholders, considering two questions that guided the visioning process:

- Whose voices need to be heard in the diversity action planning process?
- Whose voices do we typically miss?

The workgroup considered the reasons to ask these stakeholder groups for their feedback, and what information needed to be captured from stakeholders, as some data on historically underrepresented employees at OSU already exists (OID's dashboard provided race, ethnicity and gender data). This led the workgroup to focus on asking questions that would help us to understand the experiences of specific employee groups within DFA (i.e., veterans, people of color).

Ideas for soliciting feedback included an online survey, focus groups/small groups that people could opt into based on how they self-identify, listening sessions, and conversations at staff meetings. It was determined that an online questionnaire was the best way to collect feedback on the vision statement. Note that more stakeholder feedback will be collected in the future regarding the implementation of specific actions in the plan.

Of approximately 650 DFA employee stakeholders, 169 people completed the survey. No DFA employees completed the survey in Spanish. The workgroup also invited input from some external stakeholders in University Housing and Dining Services and Student Affairs, since they are similarly

sized units that provide services. Unfortunately, no external stakeholders were able to complete the survey within the required timeframe.

The main takeaway from the survey results was that out of 169 stakeholder responses, 77 strongly agreed with the proposed vision statement and 65 somewhat agreed.

Several workgroup members volunteered to form a subcommittee to review the data and text-based feedback from the survey. They were surprised with the large number of written answers, and the workgroup was encouraged that so many people took the time to provide in-depth responses. The subcommittee categorized written feedback to identify trends. Due to capacity limitations, the qualitative data was not able to be fully analyzed. It will be shared with future DEI committees in the division where relevant insights may be useful.

The workgroup's vision statement

The workgroup's efforts were guided by this vision of an ideal culture for the DFA workplace:

The Division of Finance and Administration is an inclusive environment where all employees' contributions are valued in the community regardless of their specific job, role, or unit. Together, we are establishing a culture of caring and support for each other following these guidelines:

- *Act with honesty and demonstrate accountability to build trusting relationships with people throughout the university community.*
- *Collaborate with colleagues, contributing individual expertise and integrating diverse perspectives.*
- *Create safe and respectful spaces for people to actively listen and learn, and seek to understand one another.*
- *Treat each other as equals and as individuals, offering compassion and dignity.*
- *Learn about diversity, equity and inclusion (DEI) and create ways within our jobs and teams to contribute toward DEI goals.*
- *Embrace antiracism and develop and practice culturally affirming actions and attitudes.*
- *Address power and privilege imbalances.*
- *Use modern programs and practices to recruit and retain employees who respect OSU's core values.*
- *Use vendor and supplier partners who are selected in alignment with OSU's values and whose employees are treated with the same respect and care as OSU employees.*
- *Warmly welcome new employees, and provide opportunities for ongoing education, training, professional growth and career development for all employees.*

DFA's DEI Action Plan for FY23-26

After the advance preparation and education segments, the workgroup started meeting bi-weekly to develop a list of recommended actions that every unit and every employee in the division could participate in advancing. [Meeting summaries](#) were shared regularly on the DFA Inclusive Excellence website. Workgroup co-chairs had monthly check-in meetings with the vice president and senior leaders to ensure that the final list of recommendations would be actionable.

The work plan was adjusted for schedule reasons, and in August 2022, the workgroup delivered an initial short-list of recommended actions for fiscal year 2023. The full FY23-26 action plan was delivered by the workgroup and accepted by the DFA senior leadership team at the end of November 2022.

How the action plan was developed

The development of the vision statement resulted in an inventory of DFA units' major functions and processes and a description of how it would look when equity is an integral part of them. From this, themes emerged, and small groups were formed to assess the current state of the division within each theme. Workgroup members worked with the Office of Institutional Diversity to review high-level DFA and OSU climate survey data related to the emergent themes.

Several rounds of discussion and prioritization followed, with each stage developing more understanding about employee and community members' unmet needs and barriers to accessing services. DFA senior leaders were asked to weigh in on a list of broad priorities, that the workgroup also mapped to the DFA's [key performance indicators](#) (i.e., People, Operational Excellence, Infrastructure and Financial Sustainability):

- Equitable recruitment practices
- Equitable preboarding and onboarding practices
- Equitable retention practices
- Equitable procurement and contracting practices
- Building an equity lens for DFA units, culture and workplace climate

Actions within each theme were developed as part of this process, and the list was refined to four major categories, as presented in the final recommended action plan below. Workgroup members ensured that the action plan covered the breadth of Vice President Green's initial charge.

The workgroup acknowledged that more stakeholder input is needed to develop a fuller understanding of the needs and gaps that the division should address. This can be done more effectively as part of specific projects within the action categories that will be designed and implemented in the coming months and years.

Vice President Green expressed appreciation for the way the four major action categories allow for continuity and focus over longer periods of time. Senior leaders volunteered to serve as sponsors of larger projects within the major categories over the next several years.

The workgroup encourages DFA units, teams and individual employees to engage with the action plan and work to advance it in large ways and small over the coming years.

The DFA FY23-26 DEI Action Plan

Embed equity and inclusion in everyday DFA work experiences

- Create a curriculum of foundational DEI training opportunities and resources that will establish common language and knowledge
 - a. Use existing materials created by or available to OSU to establish a DEI training program that all DFA employees would be expected to complete on a scheduled basis, starting first with leaders and supervisors.
 - b. Prioritize cohorts/teams learning together in small groups, rather than individual training
 - c. Create tracks for different categories of learning and for people with different learning styles, along with easy reference guides for employees.
 - d. Incorporate DEI education expectations into employees' professional goals/performance assessments.
- Work with University Human Resources to develop division-level guidance for supervisors related to how position descriptions and/or employee goals incorporate DEI responsibilities.
- Establish a stronger partnership between DFA and each of the OSU cultural centers to enhance engagement, communication, and learning opportunities related to DEI.
- Create a communication plan to highlight the division's DEI efforts.
 - a. Track and report key data points as implementation teams establish metrics for each of the DEI actions.
 - b. Create a business case to demonstrate the financial value associated with the division's DEI efforts.

Establish inclusive and equitable DFA hiring practices

- Expand OSU recruitment guidance and support for search committees and chairs.
- Create processes within Human Resources to support searches with resources for recruiting, hiring and onboarding through an inclusive lens.
- Develop training materials to assist supervisors and hiring managers to better recruit, hire and retain a diverse workforce.

Foster a welcoming DFA climate that increases employees' sense of belonging and inclusion

- Create a curriculum of training materials designed to improve supervisors' DEI skills/knowledge and prepare them to provide equitable support and mentorship to their employees.
- Enhance resources and support for DFA unit-level orientation of new employees (beyond the scope of the OSU onboarding program) to provide all new hires with the best chance for success at OSU.

- a. Create a plan to assist employees beyond the initial on-boarding and orientation process, such as a peer sponsor program and/or networking resources tailored to the nature of their position.
- Reduce outreach and communication barriers.
 - a. Establish guidance, expectations and resources so most DFA communications can be translated into appropriate languages and formats to reach all DFA employees as necessary.
 - b. Establish guidance and expectations for the use of clear and inclusive language in relevant DFA materials, both internal and external facing.

Work to eliminate structural bias in DFA

- Create a plan to systematically review and evaluate all aspects of DFA operations to be more inclusive and reduce barriers.
 - a. Include DFA policies, procedures, employee compensation, physical infrastructure, meeting protocol, projects, events, etc.
 - b. Develop guidance that helps DFA units create and review policies with a DEI lens to identify and address root causes of barriers and inequitable impacts.
- Reduce procurement barriers and increase the outreach to, and opportunities for, diverse and small businesses.
 - a. Increase the representation and awareness of minority, women, and emerging small businesses (MWESB) in OSU's supplier database.
 - b. Evaluate the bidding and proposal processes to prevent the disadvantaging of potential new users.
 - c. Structure procurement opportunities to facilitate MWESB engagement and participation.
 - d. Implement accessibility recommendations from OSU's [ADA31 Task Force](#).
- Expand DFA supplier diversity program to improve the ability of MWESB firms to compete and provide value.
 - a. Investigate the formation of a mentor-protégé program for Minority, Women, and Emerging Small Business (MWESB) with construction contractors aimed at building MWESB firms' capacity for larger construction projects.
 - b. Identify OSU partners, both internal and external, that could benefit from the MWESB program.

Recommendations for Transition to Implementation

The workgroup recommended to DFA senior leaders that progress on the division's diversity, equity and inclusion actions be supported by a standing DEI Advancement Committee. The group could be made up of between 8 and 12 employees from across the DFA's units and organizational structure. This is envisioned as an advisory body to the DFA senior leadership team, responsible for coordinating and/or assisting DFA teams in doing DEI work more effectively.

The vice president may want to charge a new DEI Advancement Committee with:

- Helping implementation teams and DFA leaders solve problems in the division related to diversity, equity and inclusion matters;
- Recommending prioritization of actions in the plan to DFA senior leaders as part of its regular strategic planning process;
- Generating ideas that continue to advance future and ongoing DEI actions in the division;
- Reinforcing the need for development of communication plans that keeps DFA employees and the OSU community up to date with progress on the action plan, includes regular stakeholder outreach and engagement points (such as listening sessions), and motivates DFA employees to get involved in the efforts, and executing such a plan on behalf of the advancement committee;
- Providing a systems approach view and guidance to ensure connections, dependencies and overlaps are identified and communicated with the SLT;
- Assisting implementation teams with establishing project outcomes that align with DFA guiding principles, the DEI action plan and OSU's Inclusive Excellence priorities;
- Coordinating the progress of implementation teams with SLT;
- Offering consultation with implementation teams on data analysis and metrics development as it relates to diversity, equity and inclusion;
- Reporting on overall DEI action plan progress across implementation teams to the DFA Senior Leadership Team.

Proposed advancement committee membership

One of the strengths of the current DEI Action Planning Workgroup is the interaction of employees from different levels of the organization, with different job responsibilities and unique perspectives about employee and stakeholder needs. It will be important to maintain diverse membership in DEI committees and teams going forward. It is recommended that members of the proposed DEI Advancement Committee should:

- Represent all DFA units and include a mix of employee types (classified, professional faculty; sworn officers and public safety professionals; front-line staff, managers and DFA Extended Leadership Team members);
- Initially include the current DEI Action Planning Workgroup members who wish to continue, for continuity purposes;
- Serve two-year terms, except current workgroup members who move to the DEI Advancement Committee, who can rotate off after one year to allow for overlap going forward;
- Expect to serve 6 to 8 hours per month on committee work.

Since this would be a standing body, the advancement committee members should establish roles and responsibilities among the group to manage administrative work like scheduling meetings, coordinating with implementation teams and communicating with stakeholders. The advancement committee members should engage in initial and periodic education sessions related to DEI topics, as recommended by the Office of Institutional Diversity.

Interaction with implementation teams

DFA senior leaders will serve as sponsors of large projects that advance actions in the plan. DFA leaders would be responsible for implementing actions in the plan and they would determine with project teams the specific approach to implementing the recommended actions, including collecting, analyzing and incorporating stakeholder input, establishing metrics and formulating a communication plan.

The DEI Advancement Committee would provide consultation and support to DFA leaders and implementation project teams. Implementation teams would seek guidance, share status updates and seek input on metrics development from the oversight committee. Interactions between the groups could include:

- Consultation when developing project outcomes and metrics related to DEI actions;
- Quarterly updates about project status and metrics to the advancement committee from project teams, in writing or during committee meetings;
- Advancement committee will share with DFA leaders lists of volunteers interested in serving on implementation teams.

It is recommended that the DEI Advancement Committee be formed and charged to allow for meetings to begin in early 2023. The advancement committee should spend its first several meetings establishing working relationships, roles and responsibilities and engaging in shared DEI learning.

Appendix A: Workgroup Member Testimonials

To help promote participation in DEI work across the division, the vice president's office asked workgroup members to voluntarily submit statements about why they wanted to join the DEI Action Planning Workgroup, what their experience has been like, and/or what key lessons they are taking away about the importance of this work.

Four workgroup members' testimonials are shared in full here to help inspire people to jump in and start contributing, wherever they may be on their personal learning journey.

C. A.'s statement

Procurement, Contracts & Materials Management

Why I joined the DFA DEI Action Planning Workgroup. DEI efforts and activities are gaining momentum in all areas of the workforce, and I wanted to be a part of bringing those initiatives to our division. There are not many opportunities across the division to work with others outside of your workgroup, department, or larger unit and this seemed like a once in a lifetime opportunity. Part of my job as Admin and Diversity Manager is to represent OSU at supplier diversity events and promote the use of diverse vendors. I feel like this workgroup was a good fit for me to share my experiences and knowledge gained through my outreach efforts over the years as well as learn from my colleagues.

My experience on the workgroup. Overall, it has been a positive experience. Every time the group has met, I have learned something new and positively engaged with others. We have only met through Zoom and normally I would argue that virtual meetings aren't the best platform for DEI work. However, the workgroup established guidelines to be vulnerable, honest, and supportive through the process. I think we have had some ups and downs but have figured out how to get through the work together. Our co-chairs, Keahi and Tom, along with Melanie were a cohesive team which made communication and conversation easier, and they are very approachable as well.

The key take-aways I have learned from participating in this initiative. One of our group members provided an excellent analogy that compared the journey of integrating safety in the workplace with embedding DEI in the workplace. He shared that it took a lot of years of concentrated efforts on the part of management and staff across lots of industries to implement and enforce strong safety measures. Eventually, budgets included money, and everyone felt comfortable talking about safety and even raising expectations so that it is ingrained in their jobs. We like to imagine that DEI will be the same. Everyone will become comfortable with the language, initiatives and policies and there will be budget set aside to support it.

For me one key takeaway is that DEI is messy work, but it needs to touch everyone, not just a few, to make it a part of our work. It is deep work, and we must have champions to keep it going. There will be ups and downs and we need to be vulnerable and gracious with our learning and growth. DFA leadership is taking a first step in creating this workgroup and future workgroups in the journey to embedding DEI in all aspects of our work, policies and culture.

M. M.'s statement

University Human Resources

From my own experiences, I have learned that employees and stakeholders have been unaware of negative experiences and outcomes of their OSU peers and community members. As one of the few women of color in my department, I have experienced first-hand direct and indirect interactions at OSU that have made me feel excluded and unwelcomed. I know that I am not alone sharing in these experiences, and I know that we can all do better, and do more. I volunteered to be part of this committee because I have a voice, it deserves to be heard and I want to be a part of the positive changes for DFA and OSU. There is a lot of work to do, and DEI efforts will require patience, dedication, ongoing conversations, learning opportunities, and persistence.

In participating in the DFA DEI workgroup, I have learned that there are members of DFA that want to be part of the change. They recognize that a large shift in culture is needed, that this movement does not call for one specific group's input, but that all are welcome and needed for efforts to be impactful. Successful DEI work is gradual and intentional; it involves reflection as a department, unit and individual, as well as humility, kindness, and compassion. To move forward, resources must be allocated and DFA will need to recognize the financial responsibility that comes with successful DEI initiatives.

I continue to be part of the OSU community and DEI initiatives because I believe that my voice and efforts, along with my peers, will create movement towards more welcoming experiences for future and current employees, stakeholders, and community members.

A. R.'s statement

Controller's Unit

Why I joined the DFA DEI Action Planning Workgroup. I wanted to participate in the DFA DEI action planning workgroup because to truly affect cultural change, I believe everyone needs access to resources, information and be able to practice. It's similar to learning a language, first you learn words, then grammar but you also need to practice speaking and that is the scary or difficult part of learning a language. Joining this group, I would be able to help build the foundation that others could use, share and build the skills to make change. I wanted to help create the vision of why DFA needs to change. If everyone thinks business-as-usual is working, then change won't happen. Participation would enable me to "practice speaking" so that I can help others because we all benefit from a diverse workforce.

My experience on the workgroup. It has been phenomenal, the conversations are robust, insightful, and I have learned so much and have truly enjoyed everyone's commitment to this workgroup. We have done training, reviewed data, created a current year work plan as well as a plan reaching beyond FY23. I look forward to our meetings, which are truly working sessions and always learn something new as well as feel good about the work we are doing.

The key take-aways I have learned from participating in this initiative. How to attract and retain a diverse workforce is ongoing, the work is never done it is dynamic and needs constant care and nurture and requires everyone's support.

S. S.'s statement

Controller's Unit

I joined the DFA DEI action planning workgroup because I think it is the most important work with the most long-lasting effects that I can provide the university. As an accountant by trade, integrity, objectivity, and independence have always been explicit values in my career. Working with the DEI group has provided me an opportunity to exercise other life values I have: The values of kindness, respect, & service. I may not always have the bandwidth to attend a protest, a march, or have the money to donate to a cause, but these meetings with other DFA employees provide me a safe space to learn and participate.

I think the most important thing I have learned is that educating myself and living the values of diversity, equity and inclusion is a lifelong journey. I'm not going to complete a meeting/course and 'Voila!' I'm equality personified, but I am learning how to view institutional habits with a more critical eye. Universities are steeped in tradition, and sometimes we must examine these traditions to see if they meet today's challenges. Just as the pandemic broke the barrier for many employees to provide their services by working remotely, which would have been dismissed as impractical just a year earlier; our workgroup is looking at DFA work practices to see if we can provide a fair and accessible work structure for all our current and future DFA employees.

Appendix B: References and Lessons Learned

DEI Action Planning Workgroup is sharing the information utilized during the planning process with senior leaders, DFA stakeholders and future division DEI committees. Some of the data and development materials used by the workgroup will be made available to some DFA employees in a digital repository. At the end of the plan development journey, workgroup members took time to reflect on their biggest take-aways and lessons learned; their thoughts are included here in the hopes that others will benefit.

Foundational references

The workgroup relied on these materials as important building blocks in understanding DEI matters and developing the division's action plan.

Documents

- Office of Institutional Diversity's (OID) [Plan for Inclusive Excellence](#) (2018-2023)
- OID's [Adaptive Strategic Planning for Inclusive Excellence Guidance and Toolkit](#) (PDF)
- OSU's [College of Business](#) Strategic Plan for DEI
- President and Provost's Leadership Council for Equity, Inclusion and Social Justice [2018-2019 Report](#) (PDF)

Book excerpts and articles (available from Office of Institutional Diversity)

- Arao, B., & Clemens, K. (2013). From Safe Spaces to Brave Spaces: a new way to frame dialogue around diversity and social justice. In Landreman, L. (Ed.), *The Art of Effective Facilitation: Reflections from Social Justice Educators*. Sterling, VA: Stylus Publishing.
- Kezar, A. (2018). Creating Deep Change. In *How Colleges Change: Understanding, Leading, and Enacting Change*. United States: Taylor & Francis.
- Newkirk, P. (2021, September 22). *Why Diversity Initiatives Fail*. The Chronicle of Higher Education. Retrieved February 1, 2022, from <https://www.chronicle.com/article/why-diversity-initiatives-fail/> (subscription required).
- Williams, D. A. (2013). Developing and Implementing Successful Diversity Plans. In *Strategic diversity leadership: Activating change and transformation in higher education*. Stylus Publishing.

Video lectures from Office of Institutional Diversity

- Integrating Theories and Practices of Change (<https://www.youtube.com/watch?v=NqfK6A-0pBU>)
- A Critical Ecological Approach to DEI Leadership (<https://www.youtube.com/watch?v=NqfK6A-0pBU>)

Members' lessons learned for the future

Getting started

- Take the time in the early stages of meeting to bond and understand the vision and goals. The discussions and research are the foundation for future work. The more time you spend on defining the goal and objectives, the better the outcome.
- Try to get an accurate self-assessment of where people are with the subject matter.
- Understand everyone's time commitments and how engaged that they can be.
- Working in a large group allowed for representation across departments, but some were less likely to share and be vulnerable in the large group setting. Small group work helped.
- Start the small group conversations early-on to help people gain comfort talking about difficult subjects within the larger group.

Best practices as you go

- We started the workgroup process with great foundational learning sessions, but we rarely referred back to what we learned. Deliberately applying the concepts and techniques we learned in those sessions as we progressed through the workgroup process and began addressing specific issues may have been useful.
- Allow the strengths of individuals to shine through and encourage those strengths to come out. Also understand the strengths and weaknesses of your community at large (stakeholders).
- Keep records as you go. Capture lessons learned when identified and write parts of the final report/product in real-time so that details are captured. It can be challenging to remember important aspects once the moment has passed.

Considerations for data and input collection

- The division should work with supervisors to understand DFA employees' communication preferences (do they have a need for information in languages other than English, for example).
- Be clear about when you are offering to collect stakeholder information in alternative formats, i.e., paper for folks that don't have a computer, other languages, braille.
- Limit open ended survey questions.
- Find ways to effectively welcome the input of non-majority group members within the division.
- If using focus groups used to collect stakeholder input, spend plenty of time considering ways to make it effective: who should best lead the focus groups (shared identity or experience with the group?), how to build a comfortable/welcoming environment where all people would feel safe and able to provide feedback.