



# Office of University Development (OUD)

*Diversity, Equity, and Inclusion Strategic Plan | FY 2025*

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## Strategic Plan Overview

### Selected text from President’s Diversity, Equity & Inclusion Charge

*“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 is key to individual flourishing, educational excellence and the advancement of knowledge.”* —President Santa J. Ono

Through the Office of University Development’s (OUD) five-year Diversity, Equity, and Inclusion (DEI) Strategic Plan, we aim to:

- Act with deliberateness and humility as we seek to respect and leverage diversity, secure equity, and promote inclusion.
- Examine and learn from the outcomes of our past efforts and work to improve them.
- Act on our commitment, in accordance with the law, to contribute to a just society and to affirm the humanity of all persons.

### Goals [Diversity, Equity & Inclusion]

The University of Michigan defines DEI as follows:

*Diversity* – We commit to increasing diversity, which is expressed in myriad forms, including race and ethnicity, gender and gender identity, sexual orientation, socioeconomic 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 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 OUD]**

### **DEI is Core to U-M Fundraising**

*“Philanthropy is an access point to the university. As an institution, we have a responsibility to be strategic and intentional around access.”* –Dr. Robert M. Sellers, Charles D. Moody Collegiate Professor of Psychology, Professor of Education, and former U-M Vice Provost for Equity and Inclusion and Chief Diversity Officer

In support of the university’s Vision 2034 strategic framework, the Office of University Development (OUD) maximizes private support for the University of Michigan (U-M) through high-quality collaboration with the development programs of U-M schools, colleges, campuses, and units. Alongside key partners, OUD embeds DEI values into our fundraising core work to catalyze the university’s vision. We focus on DEI in fundraising because it serves as an opportunity through which donors and volunteers can gain access to further contribute to the mission and shared causes that the university supports.

### **DEI is Essential to a Thriving Culture**

*“As leaders, we implore you to meet the moment in order to live the DEI values that OUD espouses, to exhibit the courage required to do what is right, and to transform ‘this Michigan of Ours’ by bringing its systemic realities in line with our highest values; to not put what is expedient over what is humane. We call on us all to adopt the understanding that the ultimate business case is a reasonable and humane space.”* –2022 Open Letter to OUD Extended Leadership from the Development Professionals of Color (DPOC)<sup>1</sup>

In order to maximize private support for U-M, OUD aims to foster a climate where staff can be their best selves while doing their best work. Our staff, including U-M student staff, must be able to grow, thrive, and contribute openly to a diverse, equitable, and inclusive workplace. We must embody principles of diversity, equity, and inclusion (DEI) in hiring and recruiting, onboarding and training, promotions and compensation, in our day-to-day work environment, as well as in internal

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<sup>1</sup> The Development Professionals of Color (DPOC) is a business resource group which is open to any U-M development staff who supports its mission.

activities and communications.

### **Key Strategies & Constituencies\***

The Office of University Development (OUD) uniquely impacts every member of the Michigan community in its mission to maximize private support for the university. In order to achieve our highest impact, this strategic plan mainly addresses, as our key constituencies, staff (including U-M student staff) who drive our fundraising operations and donors who are central to making a philanthropic impact through and at the university. It is important to note that, in addition to donors, we also frequently interact with faculty, students, parents, alumni, grateful patients, and community members.

Through engaging all OUD teams and leadership, we identified eight strategic objectives to further university-wide goals for DEI. The DEI 2.0 planning efforts were driven by the DEI Planning Committee, the DEI Core Team, OUD People & Culture, and OUD DEI with input from the entire OUD community. The strategic objectives are aggregated into the three distal objectives (People, Process, and Products) determined by the university. Each of these strategic objectives is accompanied by metrics that will be tracked over time, as well as descriptions of single- and, in some cases, multiple-year actions OUD will take to accomplish those objectives.

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

## **Implementation Highlights and Planning Process Used**

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### **Planning Lead(s)**

Kalia Vang, Diversity, Equity, and Inclusion Project Manager

Kat Walsh, Senior Executive Director, Diversity, Equity, and Inclusion

### **Planning Working Groups & Collaborators**

The broad diversity of identities and backgrounds represented within the planning working groups further enriched our approach to and the ideas that eventually formed OUD's DEI 2.0 Strategic Plan. The planning working groups and collaborators encompass a diversity of identities and backgrounds with respect to age, race, gender, religion, marital status, sexual orientation, national origin, function area, levels of the organization, and previous matriculation both at U-M and at other higher education institutions.

### **OUD DEI Planning Committee**

Made up of representatives from each OUD team, the staff committee engaged their respective teams in feedback gathering and brainstorming efforts, forming both OUD-wide and team-specific DEI priorities. They ensured that the strategic plan comprehensively reflects OUD's fundraising operations. This committee sunsetted in May 2023.

Sarah Barjum, Senior Associate Director of Planned Giving  
Bridget Barkume, Email and Web Content Specialist  
Patrick Carter, Director of Major Gifts Tri-State and Eastern Pennsylvania  
Anna Cronin, Director, Donor Digital Experience and Digital Hub  
Elizabeth Devlin, Executive Assistant, Campaign Strategy & Initiatives  
Katie Linder, Associate Director, Foundation Relations  
Stephanie Marengere, Senior Event Logistics Manager  
Paul Morin, Associate Director, Digital Fundraising  
Adrienne Nwachukwu, Project Manager, Strategic Marketing and Communications  
Gayatri Penmetsa, Director, International Giving and Engagement  
Becky Reames, Assistant Director, Digital Operations  
Abigail Riley, Assistant Director, Stewardship & Donor Relations  
Lauren Smott, Director, Constituent Relations and Event Operations  
Leah Warshaw, Associate Director, Culture & Engagement  
Halley Widlak, Senior Budget Analyst  
Jessica Wolma, Prospect Management Analyst  
Liyan Zhang, Finance Controls Manager

### **OU D DEI Core Team**

Made up of function and constituent leads, the DEI Core Team developed key recommendations that formed the strategic objectives, metrics, and actions in this plan. Over the next five years, this team will continue to support the implementation of DEI 2.0 due to their roles in data collection and reporting, community engagement, and as organizational function leads.

Patrick Carter, Director of Major Gifts Tri-State and Eastern Pennsylvania  
Monica Esquivel, Director of Annual Planning and Strategy  
Amy Lavi, Senior Director, Talent Relations  
David Lahie, Senior Director, Finance and Administration  
Maurice Nelson, Senior Director, Talent Acquisition  
Conor Neville, Associate Director, Campaign Strategy and Initiatives  
Kelli North, Assistant Director of Development Research, DEI Initiatives  
Victor Ogundipe, Director of Data Science and Decision Support  
Daniel Rodríguez, Associate Director, International Giving and Engagement and Business Resource Group Lead for the Development Professionals of Color (DPOC)  
Maddie Swanson, Senior Communications Specialist and Co-chair of the Early Career Professionals Committee (ECPC)  
David Zubl, Senior Director, Learning & Engagement

### **OU D People & Culture**

People & Culture embeds DEI throughout their core functional areas of talent acquisition, talent relations, and learning and engagement. The People & Culture Leadership Team and DEI Planning Committee representative, Leah Warshaw led the development of key “People” and “Process” priorities that advance a diverse, equitable, and inclusive environment that encourages individuals

and teams to be their best selves while doing their best work.

Michele Hughes, Executive Assistant, People & Culture

Amy Lavi, Senior Director, Talent Relations

Maurice Nelson, Senior Director, Talent Acquisition

Sarah Salomon, Senior Executive Director, People & Culture

Leah Warshaw, Associate Director, Culture & Engagement

David Zubl, Senior Director, Learning & Engagement

## **Year One: Implementation, Learnings, and Key Takeaways**

In FY24, OUD simultaneously navigated ongoing instances of societal systemic disparities and the reverberating effects of global events and crises, heightened polarization, and the rise of anti-DEI sentiment nationally. The moments that called on us to act accentuated our strengths as well as the long-standing gaps that make us vulnerable in fundraising for key university priorities. And while we have certainly made progress in diversifying our donor base, the need for further diversity of backgrounds, perspectives, and identities was evident this year. As we prepare for the public launch of the Look to Michigan comprehensive fundraising campaign this fall, it is clear that we need to adapt to meet the urgent present and future, meaning we need to value and understand those who are different from us and modify our responses, depending on the context, to meet the needs of a diverse Michigan community. In FY24, we advanced the majority of our actions, most of which will continue in FY25.

### **Implementation**

People (Recruit, Retain & Develop a Diverse Community):

- Hiring: When we set out to redesign our hiring and recruiting process in DEI 1.0, we aimed to design a system that would enable us to attract deep and broadly diverse applicant pools and to mitigate possible bias throughout each decision-making step of the hiring process. The data indicates that we currently attract more diverse pools of applicants than what the U-M's "applicant summary report" indicates is available in the market. When looking at aggregate data of multiple searches through each decision point, we assessed that there were not any dramatic drops in specific demographics between the points of identifying first-round candidates, second-round candidates, and final round candidates. This indicates that our process appropriately accounts for/addresses any potential implicit bias in these decision points. As one example, 30% of our hires this year are people of color compared to on average 18% during DEI 1.0 (FY17-FY21).
- Retention: In FY24, we placed more emphasis and intention into developing proactive retention strategies that benefit all of OUD, including advancements toward cultivating psychological safety and a sense of belonging. We accomplished this in a number of ways, including seeking feedback from staff, providing increased opportunities for high-quality connections, offering open office hours, and conducting more check-ins with new hires and their supervisors. Business resource groups like the Early Career Professionals Committee

(ECPC) and the Development Professionals of Color (DPOC) led programming for its own members and for development staff across U-M's three campuses and Michigan Medicine, fostering spaces where people feel they belong. Activities ranged from educational heritage month celebrations to professional development opportunities and served multiple purposes including raising awareness, learning, building community, highlighting opportunities for further support and advocacy, and more. Our collective efforts may be a contributing factor to our progress in improving the disproportionate turnover of staff of color in previous years. Through the third quarter of the fiscal year, overall turnover in OUD is at 2.5%, zero of which were staff of color.

Process (Create an Equitable and Inclusive Campus Climate):

- Strategic Planning: To ensure organizational accountability, we incorporated the DEI 2.0 Strategic Plan into the annual planning process (both for our central OUD-wide plan and for team plans). One hundred percent of teams that submitted FY24 annual plans had DEI action items, strategies, and/or objectives. This effort is essential in helping us normalize that DEI work is embedded in all of our work; every job is a DEI job regardless of if DEI is in one's job title or not. As part of our annual planning quarterly updates to OUD staff, we track and communicate centralized DEI-related key performance indicator/metric progress, which help build trust and accountability.
- Compensation: Since its inception in September 2021, the OUD Compensation Working Group has reviewed the majority of OUD positions, resulting in working title changes, job code changes, and salary adjustments. Additionally, we established a merit floor to ensure that lower paid employees received a guaranteed minimum pay increase in September 2022 and 2023. We hypothesize that our compensation initiatives have contributed to lower turnover rates, with fewer OUD employees citing pay as a primary reason for leaving OUD. In year one, OUD's primary focus remained on pay equity, defined as consistently compensating all employees within job families and across demographic groups.
- Training: As we head into the public launch of the Look to Michigan campaign amid potentially challenging times for our workplace, campus, and country's climate, training is especially needed to prepare staff to adapt to and be resilient amid changing social conditions. In support of our fundraising mission, we continue to implement regular trainings for OUD staff and development staff across schools, colleges, campuses, and units. Additionally, we continue to modify and update trainings to support development staff in integrating DEI into their strategies and everyday work. In FY24, OUD DEI in partnership with our colleagues at the Collaborative for Respectful Workplaces in Higher Ed Advancement (CRW) implemented a Train-the-Trainer session for 15 CRW members from 11 institutions on setting professional boundaries and developing strategies to respond to unwelcome behaviors. This training draws on what is most relevant in our industry and was reviewed by expert Fran Sepler. We will implement this training at Michigan, and it will inform changes we make to other training offerings and resources. While not yet launched, the OUD DEI Learning Committee completed the Equip online learning modules on navigating and adapting in culturally diverse environments. We plan to launch Equip in early 2025, providing a baseline education for all development staff across U-M's three campuses and Michigan Medicine to aid them in integrating DEI into

their fundraising work.

#### Products (Support Innovative and Inclusive Teaching, Research, and Service):

- **Diversifying U-M Donor Base:** In preparation for the upcoming campaign, we assessed past campaign volunteer and giving structures to identify potential barriers for entry to our national and regional volunteer councils. We reimagined how to both recognize our most generous donors in the campaign and simultaneously build a more broadly diverse group of volunteer advocates. The result is a decoupling of these previously overlapping structures. First, we will recognize our lead donors in a highly customized stewardship program throughout the campaign to honor and make visible the transformational impact of their philanthropy. Second, we have also recruited 6-12 co-chairs for the campaign who will convene a new Campaign Leadership Council, a network of approximately 100-150 advocates and volunteers representing different geographic regions, school/college/campus/unit support, and types of giving. Having two distinct groups instead of a single campaign council has allowed us to increase diversity (broadly defined) among our donor volunteers. For the national and regional volunteer councils, we have recruited members from different regions across the country which has resulted in representation of diverse backgrounds and perspectives.
- **Focus on Discovery Visits:** We recognize that one of the best strategies for broadly diversifying who gives to Michigan is ensuring more discovery visits with prospective donors. A discovery visit is defined as the first contact that a U-M development staff member has with a prospective donor (this can be email, in-person, phone call, or other means of communication). In our campaign goal-setting meetings, we presented schools, colleges, campuses, and units with the percentage of their visits that are discovery, highlighting the importance of discovery work. This new approach has sparked follow-up conversations about pipeline health and prospecting. In FY25, we aim to standardize and socialize the definition of discovery visits with chief development officers across schools, colleges, campuses, and units to ensure accurate and consistent coding in DART, U-M's donor database.
- **First 100 and Second 100 Projects:** We completed the First 100 and Second 100 projects, referring around 200 likely prospective donors of color who demonstrate promising wealth and affinity indicators, to development staff across U-M. These projects were a follow-up from the Alternative Wealth Screening Project, which looked at the bias that is inherent in how development operations typically evaluate wealth. Historically, there has been an overdependence on cost-effective, easily accessible public data such as real estate. While available data does provide a baseline for data work, it ignores societal, systemic issues like redlining and its aftermath. In FY25, we will begin work on a potential "Neighborhood Demographic Indicator," which will help us identify baseline demographics levels in areas where we travel and engage with prospects and donors. It will also help us to identify opportunities to host events and engagement opportunities in areas we may not have previously visited. In addition to this work, we continue to engage women and "NextGen" donors (promising prospects between the ages of 25-45, with some adjustment room for different schools, colleges, and units) among others, through dedicated communications and events.

- Fundraising for U-M DEI Priorities: OUD teams focused on frontline fundraising, donor engagement, and development services continue to integrate DEI into their practices in support of fundraising for DEI priorities across U-M. As of June 2024, OUD raised \$2.1 million for the Office of Diversity, Equity and Inclusion (ODEI) priorities this past fiscal year, surpassing our goal of \$1 million. In addition to this dedicated fundraising effort by the DEI team in OUD DEI, many gift officers across U-M fundraise in support of DEI-related funds and priorities specific to schools, colleges, campuses, and units. As of FY24, we do not have data to count those dollars yet. Once we receive those specific DEI priorities from the applicable schools, colleges, and units (those with a chief development officer) through the Year One DEI 2.0 reporting process, we will track fundraising for those identified DEI priorities in FY25 and the remaining duration of DEI 2.0.

#### Delays in FY24 Progress:

In advancing DEI, we address all forms of historical systemic bias and oppression that may be experienced by different groups and backgrounds in order to expand opportunity for all. We experienced delays to some projects as a result of resource constraints and changes in scope of work. For some work, the delays stemmed from resources diverted to providing organizational responses to the ongoing crisis in Israel and Gaza. There was an increased need for support in addressing donors and other constituents, shaping development-specific and broader campus strategy, and coaching staff and leaders in these challenging times. For other DEI actions, there were delays or slower progress than anticipated due to teams being understaffed, leadership changes, and/or changes in scope of work affecting resources and reprioritization.

#### Learnings

- It is critical to the foundation of our DEI efforts that OUD provides ways for staff (including student staff and interns) and donors to self-report their identities to inform our fundraising and workplace climate DEI efforts. In terms of donor data, we are missing affinity and identity data in DART, our donor database, which makes it challenging for us to develop a baseline understanding of the extent to which we are equitably engaging and fundraising from different groups and communities. Since DEI 1.0, we have developed strategies to collect affinity and identity data, begin capturing donors' areas of interest, and identify and engage with prospective donors of color through the First and Second 100 Projects. In terms of staff, applicants, and candidates moving through the hiring process, a key challenge for us is access to data to help us understand how we are doing as it relates to diversifying our workforce in demographics other than race and ethnicity. There is limited data regarding veteran status and disability and no data on other forms of diversity such as religion, sexual orientation, political perspectives, etc.
  - Without the opportunity to self-report accurately, this erasure may unintentionally perpetuate biases and generalizations that hinder our DEI efforts because we do not have available data to challenge any biases that may exist and show trends across different demographics. Particularly, the ongoing crisis in Israel and Gaza raised widespread awareness of the importance of collecting accurate data on nationality/national origins, racial, ethnic, and religious identities in order to understand unique challenges and disparities in the U.S. and globally, which may



affect their experiences in the workplace and at U-M broadly—a strategy many development staff across U-M’s three campuses and Michigan Medicine were previously resistant to but are now fierce advocates for collecting. The data we rely on is flawed. For example, those who identify as Middle Eastern and North African often do not identify with the existing categories for race defined by the federal government and feel they have to choose either “white” or “other,” even though neither reflect their cultural identity and experiences. Regarding gender, we utilize the federal definition of gender (used by U-M) as a binary, either “male” or “female,” which should actually be considered sex (assigned at birth), not gender. This likely means that there are inaccuracies in the data because a person’s sex assigned at birth may misalign with their gender. Similarly, the federal definition of who qualifies as disabled is limiting, and we use a broader definition in our Gallup Q12 Survey. While we pursue long-term infrastructure solutions, we will need to be flexible and creative in DEI 2.0 in order to capture accurate data in the meantime.

- Those holding identities that are underrepresented and/or historically experience bias and marginalization in the U.S. continue to score lower on our annual engagement survey, Gallup. However, the cause or reasons for the low scores cannot be deduced so easily. For example, the scores may indicate that staff have negative experiences in the workplace and/or that staff have higher expectations for their workplace to meet, though they may generally have a positive or neutral view of the workplace. At the March All Staff Meeting, OUD People & Culture presented the results of the Gallup Q12 Survey, taken in January 2024. The Gallup Q12 Survey measures “how committed an employee is to their organization, their role, their manager, and their co-workers.” According to Gallup, more highly engaged employees give more discretionary effort at work and have higher productivity, profitability, and customer service, as well as reduced turnover and safety incidents. In 2024, OUD’s overall engagement score slightly increased from 4.13 (2023) to 4.22, and 61% of staff are considered “engaged” compared to 53% in 2023. We highlighted the different engagement scores by demographics (age, gender, race, religion, foreign born status, LGBTQIA+, and disability) and the scores related to the culture- and DEI-related questions. While the overall engagement scores across different demographic identities did not widely differ, in general, those holding identities that are underrepresented and/or historically experience bias and marginalization in the U.S. tended to score lower on DEI questions regarding being treated fairly and feeling that their opinions and ideas are treasured. These results will continue to inform our efforts to foster belonging (“Process” strategic objectives).

## Key Takeaways

- Adaptation is key to our fundraising success. In late October, we hosted the DEI 2.0 Strategic Plan Launch where Dr. Milton Bennett presented OUD’s FY23 Intercultural Viability Indicator (IVI) Assessment results and recommendations to increase our organizational intercultural viability to adapt to changing social conditions. The IVI assesses the quality of an organization’s relationships among individuals and groups regarding intercultural diversity. The IVI uniquely assesses synergistic group potential, not just an average of individual qualities. It makes a prediction about future ability, not just a

statement about current competence. OUD's Intercultural Viability score was significantly high in comparison to other companies and organizations, indicating that OUD is already adapting well to social change – a condition that Dr. Milton Bennett attributes to staff cross-cultural experience and intercultural training. He suggested that opportunities for improvement would involve increasing the positive synergy between existing employee competence and organizational support. In FY25, we will continue to enhance training and implement recommendations regarding internal mediated communications (written), hybrid work, and applying intercultural competency in strategic planning and action.

- Integrating DEI 2.0 into our unit-wide strategic annual planning provided essential and familiar infrastructure to support teams and staff in making progress on DEI actions toward our five-year strategic objectives. In the near term, as we prepare for the public launch of the campaign in October, our organizational plan will carry over DEI objectives from the previous year, with key initiatives scheduled for completion by the end of the calendar (e.g., fostering belonging through regular intentional in-person gatherings and completing equity reviews to achieve organizational equity in compensation). In FY25, OUD will develop its strategy as an organization as a whole, which will integrate DEI 2.0 objectives as key to our effectiveness, such as broadly diversifying our donor base and creating a work environment where inclusion is a driver of staff success. In this later iteration of our planning process, teams will design and operationalize their own strategies that advance the organization's progress toward these objectives.
- Feedback is integral to ensuring that our efforts meet the changing needs of staff in real time. We continue to respond to changing needs through different engagement opportunities (e.g., October DEI 2.0 Plan Launch, March All Staff Meeting, regular office hours hosted by People & Culture, OUD DEI, Planned Giving, and the Office of General Counsel, the January 2024 Gallup Q12 Survey, OUD Day of Connection, the People & Culture Discussion Series, and more). We make every effort to engage staff and ensure they can fully participate during in-person, virtual, and hybrid gatherings. This includes considerations such as providing fidget toys; building in silent reflection, small, and large group discussion; and when possible, recording an event, training, or meeting for later viewing. We will often share general feedback with other teams and business resource groups organizing staff events to further support more inclusive and accessible experiences. In response to staff feedback, we launched the DEI Mental Health and Neurodiversity Committee to pursue efforts to make our workplace climate more inclusive and accessible, which is particularly needed in a hybrid work environment where both unspoken and communicated norms and expectations may unintentionally limit the full potential of staff to engage.

## **Year Two Planning Process Summary**

In determining our year two actions, we drew from insights during the DEI 1.0 Evaluation period, the planning year (FY23), and the following FY24 data sources:

### **Unit Assessment**

- The Intercultural Viability Indicator™ (IVI): In March 2023, 173 OUD staff took the IVI assessment. Based on the well-established Developmental Model of Intercultural Sensitivity and new research employing quantum measurement, the IVI assesses the quality of an organization's relationships among individuals and groups regarding intercultural diversity. The IVI uniquely assesses synergistic group potential, not just an average of individual qualities. It makes a prediction about future ability, not just a statement about current competence.

**People (Recruit, Retain & Develop a Diverse Community):**

- OUD People & Culture, OUD Finance and Administration, and University Human Resources utilize dashboards and databases that help us understand the self-reported demographic characteristics of the OUD workforce, as well as applicants to OUD (including applicants who participate in the hiring process):
  - Race/Ethnicity
  - Gender and Sex
  - Age (Generation cohort)
  - Disabilities
  - Veteran status

**Process (Create an Equitable and Inclusive Campus Climate):**

- People & Culture administered the Gallup Q12 Engagement Survey in winter 2024, which includes questions pertaining to culture, DEI, and hybrid work. We receive both unit-wide and team-specific results.
  - People & Culture presented the results to key members of OUD's leadership, all of OUD (see "Information Gathering Activities"), and business resource groups that represent constituents, including the Early Career Professionals Committee (ECPC) and the Development Professionals of Color (DPOC).
  - Every OUD team that receives team-level results holds a meeting to discuss their results. Many will incorporate the findings into their team annual planning and individual work plans.
- People & Culture administers and evaluates exit surveys and interviews. The information shared is collected and analyzed to inform climate-enhancing activities both unit wide and team specific.
- OUD DEI and People & Culture host respective regular office hours, welcoming OUD staff to discuss any topic or concern.
- People & Culture Discussion Series: In response to requests for more communication and transparency, this hybrid series serves to provide an 'opt-in opportunity' that is a facilitated, safe space where employees can participate in discussions around a variety of topics relevant to the workplace. Topics are selected based on trending inquiries and input from our unit.
- Information Gathering Activities at March 2024 All Staff Meeting
  - 170 staff discussed how they integrate DEI into their work, shared their thoughts on written notecards regarding what OUD does well and should continue doing to foster belonging, and discussed the Gallup results generally and how we can

enhance internal communications.

- Compensation Town Halls in October 2023 and May 2024 (over 120 staff for each event)
  - The compensation working group presented updates on their progress in addressing equity in compensation.
- Feedback surveys, which may be specific to the effort, project, or event (e.g., onboarding).

#### **Products (Support Innovative and Inclusive Teaching, Research, and Service):**

- Total funds raised for the Office of Diversity, Equity and Inclusion's DEI fundraising priorities; in FY25, we will have collected all DEI priorities from schools, colleges, and units (who have a chief development officer) to begin tracking this data.
- Total donors for ODEI's DEI fundraising priorities; in FY25, we will have collected all DEI priorities from schools, colleges, and units (who have a chief development officer) to begin tracking this data.
- Demographic composition of volunteer councils.
- When possible, the demographic composition of donors and volunteers that participate in key development activities. As noted in this plan, accurate numbers are dependent on our ability to increase self-reporting from donors.

### **From DEI 1.0 to DEI 2.0 Planning Process Summary**

Throughout the FY22 evaluation period of DEI 1.0 and the FY23 planning year, we collected feedback and information from all OUD levels of unit leadership and staff.

#### **Data Collection & Data Sources**

##### **Demographic and Climate Information**

- OUD People & Culture, OUD Finance and Administration, and University Human Resources utilize dashboards and databases that help us understand the self-reported demographic characteristics of the OUD workforce, as well as applicants to OUD (including applicants who participate in the hiring process).
- People & Culture administers the Gallup Q12 Engagement Survey every fiscal year (fall 2021, winter 2023, and winter 2024).
- SoundRocket administered the 2021 Campus Climate Survey, under the guidance of U-M's Office of Diversity, Equity and Inclusion (ODEI).
- Consultants Christina Chang and Marilyn Nash facilitated 10 DEI focus groups to help us understand staff experiences of OUD's DEI 1.0 efforts and priorities for DEI 2.0 (50 staff).
- People & Culture administers and evaluates exit surveys and interviews. The information shared is collected and analyzed to inform climate enhancing activities both organization wide and team specific.
- OUD DEI and People & Culture host respective regular office hours, welcoming OUD staff to discuss any topic or concern.
- Under the instruction of Ross School of Business Professor Dr. Chris Rider, multiple student groups conducted statistical analyses of key employee data (turnover report and exit interviews) to identify key factors driving attrition among staff of color at OUD.

- Edelman Audience Research Study: With the guidance of the Institute for Social Research (ISR), OUD and the Office of the Vice President for Communications (OVPC) partnered with Edelman DXI to conduct a research effort on how to build trust levels between different constituencies and U-M, partnering with schools, colleges, campuses, and units in the process.
  - In total, more than 16,000 individuals participated in the study.
  - Edelman DXI conducted 44 focus groups and 18 in-depth interviews (194 individuals).
  - The study was open to all invited constituents (including students, staff, faculty, parents, prospective students, alumni, donors, and the members of the U.S. general population including Michigan residents). Responses were aggregated to gather further insight with respect to participants who self-reported as underrepresented minorities (defined as Hispanic, Asian, Black, and multiracial participants) and from alumni who indicated belonging to a specific generation (based on self-reporting their age).

### **Unit Assessment**

- The Intercultural Viability Indicator™ (IVI): In March 2023, 173 OUD staff took the IVI assessment. Based on the well-established Developmental Model of Intercultural Sensitivity and new research employing quantum measurement, the IVI assesses the quality of an organization’s relationships among individuals and groups regarding intercultural diversity. The IVI uniquely assesses synergistic group potential, not just an average of individual qualities. It makes a prediction about future ability, not just a statement about current competence.

### **Transition to a Hybrid Workplace**

- The Workplace Transition/DEI Evaluation Working Group facilitated six listening sessions to understand staff experiences of a hybrid work environment and their work arrangement preferences (34 staff).
- The Workplace Transition/DEI Evaluation Working Group administered office hours and surveys on work arrangement preferences and experiences.

### **DEI 2.0 Engagement Activities**

- Information Gathering Activities at OUD DEI Town Halls in 2022 and 2023
  - February 2022: 138 staff shared their views on where OUD falls on the MCOB Developmental Stage Model. The majority of OUD staff attendees viewed OUD as currently in the “The Compliance Organization” stage, which guided our DEI priority-setting so that we are advancing targeted strategies that will move OUD toward becoming a multicultural organization.
  - March 2023: 57 staff submitted anonymous responses to the feedback activity, reviewing a second draft of the DEI 2.0 strategic objectives and metrics. The 2023 DEI Town Hall was originally scheduled to take place on February 14. The previous evening, our community was impacted by the tragic shooting at Michigan State University. To allow our community the time and space needed after such a tragedy,

we made the decision to transition from a live virtual gathering to an asynchronous format. While the format may have impacted the feedback we received, we provided incentives for participating and offered DEI office hours in March and April for staff to share their thoughts on the plan.

- Information Gathering Activity at the DEI 2.0 Launch (August 2022): 143 staff participated, 93 of whom shared their thoughts on initial ideas for how their teams can implement DEI in the next five years.
- Feedback Sessions on DEI 2.0 Priority Setting
  - OUD Teams: The DEI Planning Committee led and facilitated team feedback sessions to gather input and feedback on a first draft of DEI priorities.
  - OUD and development community-wide Business Resource Groups (BRGs): BRG leads gave feedback throughout the development of DEI priorities. All BRG leads were invited to solicit feedback from their OUD-based members. The BRGs that provided feedback include: the Early Career Professionals Committee (ECPC), the Employee Engagement Committee (EEC), the Development Professionals of Color (DPOC), and the Performance Support Program (PSP).<sup>2</sup>
  - Student Workers, including Telefund Student Workers and Interns/Student Workers across OUD (1 student participant): Despite efforts to reach out to student workers to review DEI 2.0 priorities, including two March feedback sessions and an anonymous survey, we fell short of expectations. This is partly due to a lower than usual number of Telefund student workers, competing priorities as students close out the academic year, and competing requests for feedback across units and campus broadly. We plan to gather more input and information on student experiences throughout DEI 2.0 so that we may adjust our strategic plan accordingly.
  - Extended Leadership Team (40 staff): Members of the Leadership Team and Directors Team provided input during every phase of the DEI 2.0 Strategic Plan creation process.
- OUD-wide Anonymous Surveys: The first survey prompted staff to provide feedback on the initial DEI 2.0 priorities and the second on the revised version (asynchronous DEI Town Hall).
- Staff shared further input and feedback at DEI office hours from January to April.

## Process Used to Analyze Data

U-M staff internal and external to OUD analyzed the data mentioned above. In some cases, the data are analyzed by external partners such as consultants and the Intercultural Viability Indicator™.

Some data are gathered annually (such as the Gallup Q12 Engagement Survey), while other data are gathered to further explore initial findings and results of climate-assessing efforts or organizational decision points. As we receive feedback, whether through annual assessment or

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<sup>2</sup> Each of the business resource groups is open to development staff who support its mission.

through one-on-one conversations, we continually integrate insights into ongoing DEI efforts as well as our DEI 2.0 planning.

## **Action Idea Generation Activities**

Inclusive of different learning and participation styles, OUD employed different tools and activities to generate ideas that formed the DEI 2.0 Strategic Plan.

- Staff-led Activism
  - In FY22, the Development Professionals of Color (DPOC) released an open letter to leaders in development across U-M's three campuses and Michigan Medicine, sharing recommendations to advance racial equity and improve the experiences of, among others and in particular, development staff of color. The recommendations shaped OUD's DEI 2.0 priorities including ensuring that OUD hiring committees and managers adhere to People & Culture's guidance on conducting an inclusive and equitable search, promoting diversity at the leadership level by taking steps to broadly diversify the applicant pools for future postings, and the integration of DEI into competencies specific to development.
- Visioning Activities
  - Early in the planning process, the DEI Planning Committee and DEI Core Team envisioned what a multicultural OUD would look like in 2028.
- Goal Feedback Sessions: As previously described, the following stakeholders were invited to give feedback throughout each phase of the DEI 2.0 Strategic Planning Process:
  - OUD teams
  - Student workers
  - Business resource groups
  - Extended Leadership Team, which includes Leadership Team and Directors Team
- OUD-wide Anonymous Surveys: The first survey prompted staff to provide feedback on the initial DEI 2.0 priorities and the second on the revised version (asynchronous DEI Town Hall).

## **Summary of Engagement Activities**

Participation in all engagement activities was voluntary and open to all OUD employees at all levels. Specifically, the Edelman Audience Research Study was open to all invited constituents, including students, staff, faculty, parents, prospective students, alumni, donors, and the members of the U.S. general population, including Michigan residents.

Engagement activities were conducted around principles of DEI, assuring not only diversity, equity, and inclusion in the data collection and planning processes, but openness, transparency, mutual respect, confidentiality and awareness of culture, intercultural competence, clarification of stereotypes as opposed to generalizations, and social identities and the power and privilege attached to them.

Engagement activities yielded raw qualitative data (staff and intern observations, experiences, and ideas) and quantitative data (demographic information and climate-related findings), which guided

DEI priority setting for each of the three distal objectives (People, Process, and Products).

## Data and Analysis: Key Findings

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### Summary of Data

The DEI 2.0 Strategic Plan reflects OUD's priorities for the next five years, which were determined as a result of DEI data analysis of OUD's climate and fundraising efforts from FY17 to FY21 and where relevant, from the evaluation year (fiscal year 2022). In the planning year, we refined our DEI priorities given further insights from staff and leadership.

### Summary of FY24 New Findings

Through data collection from donors and staff, the following new findings guide our year two efforts in addition to previous analyses and feedback.

#### Overall:

- In late October, Dr. Milton Bennett shared OUD's FY23 Intercultural Viability Indicator Assessment<sup>3</sup> results and recommendations to increase our organizational intercultural viability to adapt to changing social conditions. OUD's Intercultural Viability score was significantly high in comparison to other companies and organizations, indicating that OUD is already adapting well to social change – a condition that Dr. Milton Bennett attributes to staff cross-cultural experience and intercultural training. He suggested that opportunities for improvement would involve increasing the positive synergy between existing employee competence and organizational support. While we scored high, we have opportunities to improve our viability, particularly in how we communicate important decisions and updates at OUD.
  - Recommendations: In FY25, we will continue to enhance training and implement recommendations regarding internal mediated communications (written), hybrid work, and applying intercultural competency in strategic planning and action.

#### People (Recruit, Retain & Develop a Diverse Community):

##### Findings:

- Our data indicate that we currently attract more diverse pools of applicants than what the U-M's "applicant summary report" indicates is available in the market. When we look at our aggregate data of multiple searches through each decision point, we also understand that there are no dramatic drops in specific demographics between the points of identifying first-round candidates, second-round candidates, and final round candidates. As one example, 30% of our hires this year are people of color, which also resulted in increasing the racial

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<sup>3</sup> The Intercultural Viability Indicator (IVI) assesses the quality of an organization's relationships among individuals and groups regarding intercultural diversity. The IVI uniquely assesses synergistic group potential, not just an average of individual qualities. It makes a prediction about future ability, not just a statement about current competence.



diversity of extended leadership.

- Through the third quarter of the fiscal year, overall turnover in OUD is at 2.5%, zero of which were staff of color.

#### Recommendations:

- Continue to implement DEI practices in our recruitment and hiring process.
- Pursue short-term and long-term solutions to collect more accurate self-reported data on identities in order to refine strategies in hiring and retention.

#### Process (Create an Equitable and Inclusive Campus Climate):

- At the March All Staff Meeting, OUD People & Culture presented the results of the Gallup Q12 Survey,<sup>4</sup> taken in January 2024. In 2024, OUD's overall engagement score slightly increased from 4.13 (2023) to 4.22, and 61% of staff are considered "engaged" compared to 53% in 2023. We highlighted the different engagement scores by demographics (age, gender, race, religion, foreign born status, LGBTQIA+, and disability) and the scores related to the culture- and DEI-related questions. While the overall engagement scores across different demographic identities did not widely differ, in general, those holding identities that are underrepresented and/or historically experience bias and marginalization in the U.S. tended to score lower on DEI questions regarding being treated fairly and feeling that their opinions and ideas are treasured.
  - Recommendation: The unit-wide results affirm years-long trends, which call for culture change that may take time before we feel the systemic impact of our collective efforts. However, there are DEI actions that can immediately positively affect staff experiences of our workplace climate and hopefully, increase our engagement scores overtime. We will continue to advance a healthy workplace climate through efforts focused on optimizing our effectiveness in a hybrid work environment, learning and engagement, equity in compensation, and promoting resources and support for navigating unwelcome behaviors. We will continue to seek staff input and understand staff experiences in order to address changing needs.

#### Products (Support Innovative and Inclusive Teaching, Research, and Service):

- In order to broadly diversify U-M's donor base, OUD frontline fundraisers will conduct discovery visits as 10% to 20% of their annual visit total in DEI 2.0. In our campaign goal-setting meetings, we presented development staff at schools, colleges, campuses, and units (SCCUs) with the percentage of their visits that are discovery, highlighting the importance of discovery work. This new approach has sparked follow-up conversations about pipeline health and prospecting. Based on conversations with development staff across SCCUs, we learned that staff define "discovery" differently.
  - Recommendation: In FY25, in partnership with the OUD Prospect Development and Analytics team, we aim to standardize and socialize the definition for discovery visits

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<sup>4</sup> The Gallup Q12 Survey measures how committed an employee is to their organization, their role, their manager, and their co-workers. According to Gallup, more highly engaged employees give more discretionary effort at work and have higher productivity, profitability, and customer service, as well as reduced turnover and safety incidents.

with chief development officers across SCCUs to ensure accurate and consistent coding in DART, our donor database.

- We are missing self-reported affinity and identity data for donors in DART, which makes it challenging for us to develop a baseline understanding of, to what extent we are equitably engaging and fundraising from different groups and communities. Since DEI 1.0, we have developed strategies to collect affinity and identity data, begin capturing donors' areas of interest, and identify and engage with prospective donors of color through the First and Second 100 Projects.
  - Recommendation: We will collect self-reported data through various methods, including development staff entering self-reported information (as voluntarily shared by donors) in post-interaction updates in our donor database and embedding surveys in key engagement opportunities (e.g., the alumni biographical update survey, events registration forms, onboarding for the top donor recognition group and the Campaign Leadership Council—both consisting of donors who are critical to the Look to Michigan campaign, and more).

## **From DEI 1.0 to DEI 2.0 (FY23 Planning Year)**

### **People**

We analyzed data to assess our DEI efforts to recruit, retain, and develop a diverse community, including available, self-reported data on race, sex, LGBTQIA+, disabilities, veteran status, and more. Due to limited or incomplete data, we may be missing insights to address DEI concerns related to our workforce; however, we take into consideration anecdotes shared with us and trends in the higher education advancement industry, higher ed, and broader society.

During DEI 2.0, we hope to gather more regularly tracked data on and feedback, including in particular, from people with underrepresented and historically marginalized identities to have a better understanding of any acute disparities and challenges. For example, midway through DEI 1.0, we included LGBTQIA+ as an identity one could select in the annual Gallup Q12 Engagement Survey, knowing that this information is infrequently collected at a central level every five years through the climate survey. Given the rise of antisemitism across the U.S. as well as locally, we are working on efforts to increase awareness and cultural competency of our staff so that they are prepared to respond to and work with Jewish donors and colleagues. In pursuit of both targeted and broader DEI efforts, we remain committed to advancing DEI in our People efforts to support a thriving community and workplace for all.

In DEI 1.0, while OUD demonstrated a growing commitment to DEI over time, we struggled in making progress on key DEI areas of work, which led to the stagnant, limited diversity of our workforce. Given the newness of DEI to our unit, we spent much of DEI 1.0 building knowledge and competency needed to integrate DEI into every aspect of our work.

### **Race**

While we have recruited and hired people of color (POC) to OUD at levels often proportionate to

or exceeding the available talent in Southeast Michigan (as determined by the relevant labor pool), from FY18 to FY21, the rate of staff of color turnover is consistently more than triple that of their white colleagues. From FY17 to FY21, POC representation within OUD has been relatively stagnant, remaining between 13% and 17%. This high turnover rate of staff of color is a systemic (i.e., continuing) issue, which may indicate that OUD is not yet able to provide an environment where all POC feel they are able to thrive equally. As long as this goes unsolved, OUD is under the collective threat of undoing the excellent strides that we have made in the area of recruitment.

### **Applicants of Color**

On a quarterly basis, OUD reviews the self-reported demographic information of the applicant/candidate pool at each stage of the hiring process (first round, final round, and new hires), specifically regarding race, veteran status, and disabilities. We compared the demographic representation of each identity from the initial stage (application submission) to the final stage (hired to work at OUD) in order to observe any trends (increase, decrease, stagnant) from one stage to the next. If the trend for OUD searches across time shows relatively consistent representation of identities (based on the relevant labor/applicant pool) throughout each hiring process, this suggests that OUD's search processes are generally equitable and do not subject applicants to systemic bias, barriers, or challenges on the basis of their identity.

#### *Trends:*

- In DEI 1.0, people of color consistently represent between 25% and 30% of all discrete applicants every fiscal year.
- On average, the representation of POC tends to drop as they move through the hiring process.
  - In FY17, 25.3% of the applicant pool self-identified as a POC. This decreased to 16% of first-round candidates, 13.3% of final round candidates, and 10.2% of hires.
  - In FY21, 26.2% of the applicant pool self-identified as a POC. This decreased to 24% of first round candidates, 23% of final-round candidates, and 11% of hires.
  - Regarding the racial composition of OUD applicants and candidates, it appears that we started and ended the strategic plan in a similar place. Note, there was limited hiring done in FY20 and FY21 due to the university-wide hiring freeze, which makes it difficult to do an exact comparison between FY17 and FY21.
- On average, we hired staff of color at levels comparable to the available talent in Southeast Michigan (the relevant labor pool).

### **Staff of Color**

When looking at disaggregated data by race, we observed variation in specific groups' demographic composition of the workforce and experiences of OUD's climate. While we are unable to make statistically significant conclusions about each group due to the small number of staff in each group, further research on overall trends (in higher ed and higher ed advancement) and feedback gathering demonstrate that there exists variation in the ways staff of color experience OUD's climate that is specific to their race and ethnicity.

#### *Trends and Findings:*

- The percentages of Black and African American staff and of Hispanic and Latino/a/x staff have both similarly decreased from FY17 to FY21 by nearly half, each from 4.7% to 2.7% of OUD's workforce.<sup>5</sup>
- Black staff and Latino staff have shared that they experience bias, microaggressions, and exclusion in the form of 1) an unwelcoming work environment and 2) inequitable opportunities with regards to work and career advancement.
- Asian and Asian American staff consistently represent around 5% to 6% of OUD staff.<sup>6</sup> The consistency in Asian representation prompts questions about what OUD is doing well to retain Asian staff who consistently indicate positive responses in climate surveys. There are no Asian staff represented at the OUD director level or leadership level. Despite making up the largest constituency among staff of color within OUD, Asian staff appear to be under-engaged (compared to their numbers in OUD) as active participants in OUD-wide efforts such as feedback gathering sessions, working groups, committees, and business resource groups, where participation is either voluntary or appointed by one's team leader or supervisor.
- From FY17 to FY21, out of about 170 to 225 OUD staff, one to two staff identify as Native American, Indigenous, and Alaskan Native every year. In order to protect confidentiality, we are unable to provide in-depth data or group findings on their experiences at OUD. Still, we believe it is important to highlight that more can be done to identify any unique barriers and challenges impacting the hiring and retention of Native American/Indigenous staff at OUD.

### **Representation Across OUD Extended Leadership**

In DEI 1.0, we set a goal to diversify OUD leadership. Unfortunately, we were not able to make meaningful progress in this area due to limited transitions (hence limited vacancies) and a desire to move the process forward even if there was limited diversity in the applicant pool. Staff of color shared that the limited racial diversity among leadership is an influencing factor in their experience of our climate in an open letter to OUD's Extended Leadership Team.

#### *OUD Leadership Team*

- In FY17, out of eight members of Leadership Team, one self-identified as a POC.
- In FY22 (the evaluation year), zero out of 10 members of OUD Leadership Team self-identified as a POC.

#### *OUD Directors Team*

- In FY17, out of 25 members of the Directors Team, zero self-identified as a POC.

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<sup>5</sup> For the rest of the plan, we utilize the term Black as it is widely considered a more inclusive term for individuals of African descent who may originate from the U.S. or may hail from another country. We utilize the term Latino which refers to an individual who is from or has a background from Latin America. However, we recognize that individuals may prefer other terminology such as Hispanic, Latina, Latinx, or a term indicating one's specific national origin (example: Mexican, Venezuelan, or Colombian).

<sup>6</sup> For the rest of the plan, we utilize the term Asian to be inclusive of the Asian diaspora: those who have an American-centric experience and those who have formative experience outside of the U.S. While Asians and Asian Americans are delineated in this mention, we acknowledge that individuals' lived experiences are nuanced given the passing of the 1965 Immigration and Nationality Act, which increased the Asian population in the U.S. by 29-fold from 1960 to 2019. Source: [Migration Policy Institute \(2021\)](#). We also recognize that the Asian community is not a monolithic group. Where possible in the future, it is best practice to disaggregate data by ethnicity in order to identify specific trends.

- In FY22 (the evaluation year), out of 27 members of the Directors Team, three self-identified as a POC.

### **Gender<sup>7</sup>**

From FY17 to FY21, OUD’s gender representation overall remained steadily proportional to the higher education advancement industry, 70% female and 30% male. While there do not appear to be disparities in hiring and retaining female staff overall, generally, women continue to be underrepresented in development leadership positions.

### **Representation across OUD Extended Leadership**

While female staff make up 70% of OUD’s workforce, their representation in OUD levels of leadership is less proportional on average, which could indicate that additional review is warranted to see if there may be unconscious or other biases and inequities influencing these outcomes.

#### *OUD Leadership Team*

- Of all Leadership Team positions, in 2017, 62% were male staff and 38% were female staff. In 2021, 40% were male staff and 60% were female staff, which is more proportional to overall staff gender demographics today than it was six years ago.

#### *OUD Directors Team*

- Of all director-level positions, in 2017, 32% were male staff and 68% were female staff. In 2021, 52% were male staff and 48% were female staff, a 20 percentage point decrease in female representation since 2017.

#### *Gift Officers*

- Of all staff who hold the gift officer job code, in both FY17 and FY21, gift officers were evenly split: 50% male and 50% female.

### **Opportunity Parity**

The disproportionate gender representation in leadership, as compared to the overall gender breakdown of OUD staff as a whole, could warrant further scrutiny to see whether there might be an opportunity parity where women are not provided fair opportunity to excel in their roles, such that they could have been prepared for future promotions and qualification for more senior positions.

Due to the work of the OUD compensation working group, there are no longer salary inequities

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<sup>7</sup> Throughout this strategic plan, references to female refer to cisgender women whose gender identity matches with the sex assigned at birth. The same applies to references to males and cisgender men. We recognize that sex and gender are two different and related identities; one’s sex at birth can differ from one’s gender identity.

We made the decision to connect cisgender identities to their correlating sex identities due to the following facts. In the 2021 university-wide Climate Survey, 99.3% of OUD survey respondents identified as either women or men and .7% either identified as transgender, genderqueer, and/or gender nonconforming or answered that their preferred gender was not listed. In 2017, 100% of OUD respondents either identified as men or women and 0% identified as “other gender identity.” Because transgender men may identify as men and transgender women may identify as women, we will need to look at how we provide clear and inclusive self-reporting options in DEI 2.0.

with those in the same job code at OUD. Even though we have narrowed the gap at leadership levels, the highest paid positions are still held by men.

### **Age**

From FY17 to FY21, millennial-aged staff (born from 1982 to 2003) increased slightly, representing 44% of staff in FY17 and 48% in FY21, meaning 48% of permanent staff are between the ages of 20 and 41 years old (as of the publishing of this plan).

#### *Trends and Findings:*

- In DEI 2.0, we will continue to track trends as early career professionals are reporting lower engagement scores compared to other age groups and/or have shared concerns on specific key areas: connectedness to OUD, respect, professional development, opportunities for growth within one's role, and mental health and wellness.
- Early career professionals are more likely to be individual contributors. OUD defines an individual contributor as a staff member who does not directly supervise an OUD employee (excluding temporary staff and student workers). As of June 30, 2021, 100% of those aged 20 to 30 and 75% of those aged 31 to 40 were individual contributors.
  - Individual contributors expressed feeling a diminished ability to influence unit-wide outcomes on important issues due to their status as an individual contributor.
  - Within the organizational hierarchy, team directors and managers have more direct influence in decision making on key issues than individual contributors. In different ways, there are opportunities for individual contributors to take an active leadership role (through working groups and committees), yet we continue to navigate these tensions due to the way OUD structures the decision making process.

### **Process**

We analyzed data to assess our DEI efforts to create an equitable and inclusive unit climate. This includes efforts to ensure that we are implementing DEI into our culture and fundraising operations. As our donor base becomes more diverse, our staff need to be culturally competent to cultivate meaningful relationships that advance our mission to maximize private support for U-M.

Anchored by the 2022 letter sent by the Development Professionals of Color (DPOC) to OUD Extended Leadership as well as key DEI 1.0 findings and feedback, DEI 2.0 emphasizes the need to move from commitment to DEI to strategic action and integration into every aspect of our culture.

### **Organizational Assessments**

#### *The MCOB Developmental Stage Model*

The MCOB Developmental Stage Model demonstrates the different phases an organization must go through to transform into a multicultural organization that values the contributions of a diverse workforce.

- At the 2022 OUD DEI Town Hall, the majority of OUD staff attendees viewed that OUD is currently in "The Compliance Organization" stage based on organizational indicators such as providing some access to some members of previously excluded groups; no change in

organizational culture, mission, or structure; and promoting an environment where individuals are not encouraged to challenge privileged group members.

- While we have more work to do to become a multicultural organization, our unit-wide DEI efforts have made a difference at a systemic level. This has been reaffirmed in the 2021 Climate Survey findings where 67.1% of all staff respondents, 76.7% of women respondents, and 77.3% of POC respondents agreed that OUD has a strong commitment to DEI. 71.2% of all staff respondents, 73.6% of women respondents, and 58.8% of POC respondents perceived that OUD's climate is somewhat or much better today than before the DEI 1.0 Strategic Plan.

### *Intercultural Viability Indicator™*

With the use of the Intercultural Viability Indicator™ (IVI) in 2023 and over the course of DEI 2.0, we will gain a better understanding of the relationship between individual competence and organizational support, which will aid our efforts to move along this continuum to become a multicultural organization.

### **Staff Feedback**

#### *2022 Focus Group Findings*

In April 2022, consultants Christina Chang and Marilyn Nash facilitated 10 DEI focus group sessions to help us understand the experiences of OUD staff had of our unit's DEI 1.0 efforts and priorities for DEI 2.0 (50 attendees). Through focus groups open to all interested staff, participants shared what future actions and strategies are needed to advance racial equity and in doing so, improve OUD's work environment for all. Chang and Nash put forth the following findings.

#### *Diversity is Important (But Not the Only Answer)*

- OUD staff expressed the need for OUD to become more diverse in the workforce and in its leadership. There is a need for OUD-wide commitment to antiracism and equity, meaning addressing any systemic bias, challenges, and barriers that deeply affect segments of the workforce, whether that be specific to identity, status, or other background.

#### *OUD Culture is Challenging*

- As is with U-M and higher education in general, OUD's culture is rooted in hierarchy and tradition, which is slow and even resistant to change. As a result, our culture often shields those with the most privilege who are afforded the right to emotional and psychological comfort, and our culture may discourage open conflict and direct feedback, which are part of transforming from a status quo/dominant organization to a multicultural one.

#### *Diminished Trust and Transparency*

- Across all levels of the unit, OUD needs to grow in our ability to communicate about uncomfortable topics. Staff shared concerns about their ability to comfortably share their own thoughts, perceiving an intolerance for difference and or diversity of thought.

#### *Zero-sum Fallacy*

- In a zero-sum world, there is an inherent competition for limited resources, time, and attention, often causing many to overlook the fact that universally, individuals share the desire to feel a sense of belonging and to be valued for one's contributions. There is a broad perception that there are limited resources to address DEI concerns, which in turn, creates the perception that focusing on any one group's disparities takes away potential resources from other groups.

### *Accountability*

- In order to be accountable for OUD's DEI objectives, staff would like enhanced communication and reporting mechanisms. They expressed wanting to know how OUD will embed DEI across the unit in a meaningful way that is relevant to their everyday work and experiences.

### **DEI 2.0 Feedback Sessions, Survey Results, Office Hours, and One-on-One Conversations**

*Staff cited the following as factors in their experience of our climate:*

- Staff perceive that OUD is committed to DEI, and OUD has improved since the start of DEI 1.0.
- Staff value increased flexibility as a result of the transition to a hybrid work environment.
- A desire for more opportunities for individual contributors and managers to provide input and further influence the organizational decision making process
- Limited racial diversity in OUD leadership and the workforce
- Incidents/Perceptions of bias, microaggressions, and an unwelcoming or exclusionary environment related to race, gender, and age
- Perceptions of inequitable opportunity and consideration regarding awards, recognition, and promotions
- Experiences of unwelcome behaviors from donors: Staff expressed feeling supported by the response and remediation efforts put in place to address such incidents.

### *2021 Climate Survey*

- People of color (POC): In the 2021 Climate Survey, 54.5% of POC respondents said they were satisfied/very satisfied with OUD's climate, compared to 68.9% of white respondents. Since 2017, POC satisfaction dropped by five percentage points whereas white staff satisfaction increased by four percentage points.
- Potential reasons for the decline in satisfaction include:
  - The rightful change in expectations that POC have of OUD leadership and their colleagues to take actions against racism and be anti-racist.
  - Increased comfort in speaking about concerns without fear of retaliation. Essentially, staff of color may have increased expectations, and they are no longer tolerating minimal or ineffective efforts to advance racial equity.
  - Experiences of bias, microaggressions, and other exclusionary and negative experiences.



### *Compensation*

As part of our budget practices, OUD DEI, Finance and Administration, and People & Culture formed a compensation working group, focusing on a longer-term compensation philosophy and integrating aspects of pay equity, pay parity, and opportunity parity. Initial successes include: (a) a slight salary adjustment for all staff under equity at the start of FY22; (b) adjustments made through job code reclassifications, promotions, salary adjustments, and working title updates for more than 100 positions between FY22 and FY23 outside of our annual merit process, and (c) salary increases for student staff involved in the Development Summer Internship Program and Telefund, as well as raising the minimum hourly rate for all temporary and student employees in alignment with the university's recent decision to do so.

### *Turnover Findings*

Under the instruction of Ross School of Business Professor Dr. Chris Rider, multiple student groups conducted statistical analyses of key employee data (turnover report and exit interviews) to identify key factors driving attrition among staff of color at OUD.

Retention of staff of color is necessary to achieve equity in promotions. All else equal, employees are more likely to stay if they expect a promotion in the future than if they do not. A promotion is probably more likely if employees are expected to stay.

Because there were more distinguishable statistical differences between white and Black staff, the analysis further uplifted the findings between these comparison groups (although our intention is to understand how all racial groups experience OUD through continued analyses). There is an observed racial disparity in the probability of ever being promoted among white staff and Black staff. Black employees are less likely to ever be promoted than other employees are. More promotions are observed for white employees than for employees in other racialized identity groups.

Possible reasons to explain the disparity in promotions between Black staff and white staff include:

- Differential Entry: Black employees might be hired into higher levels of the organization than other employees are. Fewer positions above one's initial position would then generate a disparity in the likelihood of ever being promoted.
- Differential Exit: Black employees might leave OUD or U-M faster than other employees do. This would thus generate a disparity in the likelihood of ever being promoted.
- Differential (Subjective) Evaluations: Black employees might receive lower (subjective) performance evaluations than other employees in their initial positions. To the extent that promotions are conditional on performance, this would then generate a disparity in the likelihood of ever being promoted.
- Anecdotally, staff of color have mentioned experiencing differences in professional development opportunities, mentorship, sponsorship, and so forth, which can influence the eventual outcome of being promoted.

## People and Process: Moving into DEI 2.0

In the planning year, we learned further insights on staff experience of our past DEI efforts to recruit, retain, and develop a diverse community and to create an equitable and inclusive unit climate—and also, what is most important to staff as we set five-year DEI priorities in these areas.

### Insights

#### *Overall DEI Implementation*

- Staff of color emphasized the need to take more assertive action on DEI that results in equitable opportunity and behavioral changes that will improve OUD's climate and lead to a more diverse workforce.
- Staff would like OUD to develop more practices and resources related to disabilities, LGBTQIA+, and the Jewish community.
- Staff across OUD are interested in building DEI skills and raising their own awareness of DEI issues and topics.

#### *Addressing Bias and Conflict*

Staff would like a clear understanding of ways to address conflict and bias. Particularly, having a better understanding of the reporting process within our unit and at U-M broadly will help create a climate of psychological safety to encourage staff to come forward with concerns and will help staff understand their choices should they pursue mediation and reporting.

#### *Diversifying OUD's Workforce*

Staff appreciated the impact of new resources and further support from People & Culture to mitigate possible bias in searches. Many express interest in honing their DEI skills to broadly diversify their teams.

#### *A Hybrid Workplace*

Staff appreciate the transition to a hybrid workplace where there is greater flexibility in work arrangement (including in-person, hybrid, mobile, and remote options). This is experienced as inclusive of different identities and supportive of work-life balance. According to the 2023 Intercultural Viability Indicator™ (IVI) results, OUD has demonstrated above average intercultural viability, which Dr. Milton Bennett attributed to OUD's trainings. OUD needs to improve on its mediated communications to engage staff as we continue to rely on written communications and technology in a hybrid work environment.

#### *Career Pathways*

Staff expressed the need to make career pathways more transparent so that staff know what steps to take to prepare for the next role or be considered for future promotions. This would help eliminate any biases, including any that might be or appear to be identity-related, that impact our ability to retain talent.

#### *Transparency and Communications*

Staff would like OUD to continue pursuing what transparency, communications, and accountability

look like and how OUD can integrate feedback and uplift the voices and leadership of all—especially those who may not be in positional leadership, such as early career individual contributors, staff of color, and women.

## **Products (Fundraising)**

We analyzed data to assess our efforts to increase fundraising for DEI initiatives across all three campuses and Michigan Medicine and to broadly diversify the U-M donor base.

In support of the university's mission, the Office of University Development (OUD) maximizes private support for the University of Michigan. In collaboration with partners, OUD embeds our DEI values into our fundraising core work. We focus on DEI in fundraising because it serves as an opportunity through which donors and volunteers can gain access to further contribute to the mission and shared causes that the university supports.

In DEI 1.0, we struggled to identify how best to track fundraising progress related to DEI initiatives and funds. We plan to update the way we collect data and report on DEI fundraising in DEI 2.0, knowing that our current methodology likely undercounts funds raised for DEI efforts. In the planning year, all units received guidance on creating strategic objectives and metrics around fundraising. From there, we will be able to enhance our reporting to better reflect the funds raised for current DEI priorities across U-M.

### **Diversifying U-M's Donor Base**

U-M's donor base currently reflects those holding the most privileged status in American society: older, straight white cisgender men. The limited diversity in our donor base is an outcome of the history of exclusionary norms and systemic factors in the field of fundraising generally. We aim to ensure that all have equitable access to philanthropy at and through U-M.

Philanthropy is an access point to the institution. Major donors, via their service on OUD volunteer boards, may through that service have access to the university president, executive officers, and academic leaders due to their giving and volunteering. Dr. Scott Page's research mathematically proves that we need diverse teams to solve the complex problems facing this institution. If we broadly diversify our donor base, we diversify the voices and perspectives that may be invited to interact with or advise our decision-makers and position ourselves to persist as a global leader in education and research.

### **Incomplete Data Hinders DEI Efforts**

One of the vulnerabilities affecting our ability to integrate DEI into our fundraising practices is the limited demographic data available on the U-M donor base. Due to missing and incomplete demographic data in our internal donor database, we are unable to identify exactly which identities and affinities are underrepresented generally. Without demographic data available on most constituents (e.g., race), we are unable to understand fully the scope of our progress. As a guide, we rely on broad narratives and trends across the fundraising industry and society broadly.

Data strategy has enhanced our ability to identify incomplete DEI-related donor information and to

mitigate bias in our wealth screening process, strengthening our current tactics to identify high capacity donors from broadly diverse backgrounds. We piloted a data policy to collect and utilize identity and affinity information on constituents that will help strategically steward donors to support DEI and other funds that speak to their interests, backgrounds, and experiences.

Through the ODEI Diversity, Democracy and Structural Racism Grant, OUD Prospect Development and Analytics (PDA) and Data Science & Decision Support analyzed in-house data and data from different vendors to consider indicators that will help us mitigate any bias in our current wealth screenings, for instance accounting for U.S. history of redlining when using real estate data. PDA utilized more heavily researched and nuanced datasets that they have not had access or resources to obtain on a large scale before. We obtained data sets from three vendors and analyzed them for racial diversity and wealth, calculating how much time would be required to diversify our pipeline using each. Between the acquired data sets and traditional research projects, we identified 482 likely high-level prospects of color with whom we may want to engage as first-time donors to the U-M.

Working groups such as The Raise: Generations of Black Excellence, the Women's Philanthropy Committee (WPC), and NextGen Philanthropy support by gathering and analyzing data. For example, the Women's Philanthropy Committee developed data strategies and resources to help OUD track the disparities between men and women donors and volunteers for the first time. The WPC reviewed the gender composition of volunteer boards across U-M and produced a report of the findings with recommendations to promote greater gender diversity. In April 2021, the WPC released the Women's Philanthropy Progress Report, which is a Tableau tool that enables us to track our engagement of women in almost real time.

## **Moving into DEI 2.0**

In the planning process, OUD staff reiterated their commitment to broadly diversifying U-M's donor base and to fundraising in support of DEI priorities across all three campuses and Michigan Medicine. They identified concerns around self-reported data, wanting to ensure that in a push for more data collection, we remain compliant with the law and that donors are invited to share affinity and identity information as relevant to their philanthropic interests. Staff expressed wanting to set standard expectations for donor discovery work, which can increase opportunities for engagement with donors of all backgrounds, including those from marginalized and underrepresented backgrounds.

Throughout the giving cycle, OUD teams collaborate with one another to fundraise for U-M. Teams identified key areas of work—from communications to events and digital infrastructure - that advance our shared goals to diversify the U-M donor base and increase funds for DEI priorities.

## **Key Findings, Themes, and Recommendations**

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## People

At OUD, we endeavor to create a climate where staff can be their best selves and do their best work. We remain committed to diversifying our workforce. The DEI 2.0 Strategic Plan reflects our below recommendations:

1. Through DEI hiring practices, set and meet expectations to support staff in adhering to the People & Culture (P&C) team's standard of diversity (defined as, striving for the representation of underrepresented applicants in OUD searches to meet or exceed the availability data on the qualified labor pool) in all searches and mitigating any bias in the hiring process.
2. With P&C's leadership and support, OUD will take steps to increase racial diversity at the leadership level.
3. In partnership with the Development Professionals of Color (DPOC), OUD DEI and P&C will develop and integrate intercultural competencies into OUD standard operating procedures (e.g., OUD performance management process, onboarding, career advancement decisions, and more).
4. OUD DEI and P&C will implement belongingness strategies and continue to provide guidance on conflict resolution practices in order to increase retention of, in particular, POC and offer a more supportive and positive environment for all, including neurodivergent staff, the LGBTQIA+ community, including those identifying as gender neutral or nonconforming, and colleagues with disabilities both visible and invisible.

## Process

As our donor base becomes more diverse, our staff need to be culturally competent to cultivate meaningful relationships that advance our mission to maximize private support for U-M. The DEI 2.0 Strategic Plan reflects our below recommendations:

1. OUD will incorporate the DEI 2.0 Strategic Plan into the annual planning process to ensure that DEI objectives are set, tracked, and reported on regularly, as opposed to having fully separate mechanisms as was the case in DEI 1.0. This will increase OUD-wide awareness of unit and team-specific DEI priorities, encourage collaboration, and help us address opportunities and challenges in meeting our strategic objectives.
2. Guided by Intercultural Viability Indicator™ (IVI) recommendations, OUD will develop and acquire tailored change management processes and resources to support OUD-wide and team implementation of DEI in their core work.
3. Advance pay equity in compensation across OUD: In DEI 2.0, we plan to develop a long-term compensation and career advancement philosophy that addresses opportunities around pay equity, pay parity, and opportunity parity. We aim to challenge and transform industry compensation standards as a leader in the positive culture movement, publish and consistently communicate our compensation practices and advancement opportunities, leverage new data-driven insights to drive breakthroughs in decision making, and increase

representation of different perspectives on the committee and give voice to all staff in every step of our compensation and advancement practices and decisions.

4. OUD will advance industry-wide changes to support safety and ethical decision making in fundraising. OUD DEI leads the Collaborative for Respectful Workplaces in Higher Ed Advancement (CRW), the only known international consortium of 22 higher ed institutions gathering on this scale to share best practices and resources and develop standard guidelines to address unwelcome situations. In DEI 2.0, in partnership with industry stakeholders, we plan to develop and implement industry-wide best practices. At OUD, we will continue to build on best practices including the formal rollout of incident reporting, developing trainings with consultant Fran Sepler to help staff navigate unwelcome situations, and efforts to build a culture of trust so that colleagues feel comfortable coming forward with concerns.

## **Products (Fundraising)**

In DEI 2.0, we plan to focus on the following in order to maximize private support for U-M.

1. **Integrate into the university-wide DEI 2.0 strategic planning and reporting process:** We have worked closely with Associate Vice Provost Katrina Wade Golden to add an action item to the DEI 2.0 plan requirements, specifically asking units to share their DEI fundraising priorities. This will foster dialogue and connection between Deans/Directors, Chief Development Officers, and unit DEI leads. Gathering this information annually will better position U-M to fundraise for and report on DEI fundraising activity to the Michigan community and Regents, particularly as we launch our upcoming comprehensive campaign.
2. **Integrate DEI as a foundational element in our upcoming campaign:**
  - a. We will continue efforts to integrate DEI in the future campaign. In FY22, OUD worked with all five Campaign Theme Groups to integrate DEI into the process and content of the campaign. OUD and partners recruited broadly diverse membership for the Campaign Theme Groups and leveraged campus expertise throughout the process. We will continue to work closely with Vice Provost for Equity & Inclusion and Chief Diversity Officer Tabbye Chavous and through the DEI 2.0 plan to ensure that we garner support for critical DEI priorities across U-M.
  - b. In order to broadly diversify U-M's donor base, OUD frontline fundraisers will conduct discovery visits as 10% to 20% of their annual visit total. Often, fundraisers' portfolios are composed of established long-time donors. By setting a goal around discovery visits, this will help us engage more prospective donors who reflect a broader diversity of perspectives and interests.
3. **Integrate DEI practices into our everyday fundraising operations:** In support of OUD's mission, teams continue to integrate DEI throughout the giving cycle. For example: identifying prospective donors and funders, informing donors and the public of the philanthropic impact at and through U-M, holding fundraising events and events to introduce President Santa Ono to donors, and thanking donors for making a gift.
4. **Leverage our learnings from the Alternative Wealth Prospect Screening Pilot:** The Alternative Wealth Prospect Screening pilot will have a significant and lasting impact on

two critical goals within development: broadly diversifying the donor base and fundraising for interdisciplinary initiatives, such as DEI. In the traditional research projects—zip codes and board/associations—we have refined new methods to diversify our everyday prospecting, which will have an impact across all of the schools, colleges, campuses, and units that we work with.

- a. We have identified a vendor—Windfall—that returns wealthy prospects including wealthy POC prospects, at a high rate with lower demand on staff time than our baseline vendor, Blackbaud. Though the upfront cost is higher, in the long run, we will save valuable staff time doing the analysis of the data.
  - b. Between the data sets and traditional research projects, we have identified 482 likely POC high-level prospects with whom we may want to engage as first-time donors to the U-M.
  - c. We continue to see interest from other institutions around this project, positioning us as a leader in the development field.
5. **Fundraising for ODEI:** As a fundraising partner to the Office of the Provost, OUD DEI will raise \$1 million in production for the Office of Diversity, Equity and Inclusion (ODEI) priorities annually in DEI 2.0.

## Strategic Objectives, Measures of Success, and Action Plans<sup>8</sup>

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### **Introduction:**

The Office of University Development (OUD) plan covers donors, volunteers, and staff (including student workers). The strategic objectives needed to further the university-wide goals of diversity, equity, and inclusion have been aggregated into three distal objectives determined by the university. Each of these strategic objectives is accompanied by metrics that will be tracked over time, as well as descriptions of single and multiple year actions we will take to accomplish those objectives. For additional detail on assignments, timelines, and accountabilities, see the Action Planning Table.

## PEOPLE (Recruit, Retain & Develop a Diverse

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<sup>8</sup> All strategic objectives and related actions will be pursued in accordance with the law and university policy.

# Community)

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Strategies and action items for People are designed to bolster and extend the work of all units by introducing effective programs and procedures aimed at recruiting, retaining, and supporting a diverse campus community. DEI-related recruitment and retention efforts across campus reflect the varied needs and goals of specific units and groups. Note, many of the actions listed are multi-year efforts and began in year one.

## Staff

**Strategic Objective 1:** Integrate diversity, equity, and inclusion strategies into every phase of the employee life cycle, resulting in an increasingly multicultural OUD workforce where staff can be their best selves and do their best work.

### *Metrics:*

1. 100% of the time, the percentage of underrepresented applicants to jobs at OUD meets or exceeds the availability data on the qualified labor pool (based on specific job codes) from the U.S. Census for each search. Based on data availability, we will continue to evaluate race, gender, veteran status, and disabilities.
2. Increase diversity of OUD staff, including the Extended Leadership Team level (Directors and Leadership Team) based on readily available demographic data.

### *Actions:*

1. Metric 1
  - a. Conduct proactive outreach to source prospective applicants and feed candidate pipelines.
  - b. Utilize DataPeople tool to create inclusive job advertisements that attract deep and broadly diverse applicant pools.
  - c. Utilize Biteable tool to create inclusive videos that can be used to help attract applicants.
  - d. Advance careers marketing efforts in collaboration with OUD Marketing and Communications.
2. Metric 2
  - a. Utilize pre-scripted interview questions, blind resumes, and include a colleague as a “bias checker” in decision making moments in order to reduce any potential bias throughout the hiring process.
  - b. Track and report on aggregate demographic data for all of OUD and also specifically, Extended Leadership Team (Directors and Leadership Team) on an annual basis.
  - c. Continue to implement workforce planning efforts with Leadership Team.
  - d. Require interview training for all hiring managers.
  - e. Require unconscious bias training for anyone involved in a search.

*Primary DEI Goal:* Diversity



**Strategic Objective 2:** Implement proactive retention strategies with a focus on valuing the unique perspectives of and addressing the unique disparities that may be faced by those from underrepresented identities and backgrounds. In particular, we aim to address the disproportionately high turnover of staff of color, knowing that in addressing this unique issue we will develop robust practices that benefit all staff.

*Metrics:*

1. Reach proportional turnover within OUD particularly between white staff and staff of color who exit OUD.

*Actions:*

1. Metric 1
  - a. Develop and communicate pathways for addressing unwelcome behavior including resources, training, support, and reporting options.
  - b. Revise staff competencies to incorporate intercultural competency.
  - c. Celebrate and recognize heritage months/days through monthly communications and bi-monthly to quarterly programming.
  - d. Seek buy-in and support of OUD's recently established Career Navigation Definition & Philosophy and begin executing on a multi-year project plan to implement resources and support
  - e. Complete needs assessment to identify the type of support to managers and leaders that will be most effective in promoting meaningful conversations with staff.
  - f. Enhance the overall onboarding experience.
  - g. Enhance the process of soliciting feedback from new hires regarding their onboarding experience and continue to use that feedback to make improvements along the way.
  - h. Develop a plan for manager and leadership support based on needs assessment.

*Primary DEI Goal:* Inclusion

## PROCESS (Create an Equitable and Inclusive Campus Climate)

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Strategies and action items for Process are designed to support and strengthen the development of policies, procedures, and practices that create an inclusive and equitable campus climate and encourage a culture of belonging in which every member of our community can grow and thrive. Note, many of the actions listed are multi-year efforts and began in year one.

### Staff

**Strategic Objective 1:** Incorporate the DEI strategic plan into the OUD-wide and team annual planning process.

*Metrics:*

1. 100% of teams have DEI objectives/efforts present in their annual team plan.
2. An increase in OUD's Intercultural Viability Indicator (IVI) measure over five years. The IVI measure informs our DEI priorities, helping us understand the relationship between individual competence and organizational support.

*Actions:*

1. Metric 1
  - a. Modify the annual planning process to add DEI prompts and language to team planning requirements.
  - b. Every team plan will have at least one objective that will impact DEI efforts.
  - c. Include regular updates of DEI metrics in quarterly reports.
2. Metric 2
  - a. Analyze the 2023 results of the IVI and develop one-year and three-year recommendations in FY24 for team and OUD-wide implementation. This will inform teams' DEI priorities and how they will implement DEI.

*Primary DEI Goal: Equity*

**Strategic Objective 2:** Advance a healthy culture that values the contributions and perspectives of all OUD staff.

*Metrics:*

1. Gallup survey results increase in score on the statement, "DEI4: My organization treasures diverse opinions and ideas."
2. 100% of reports of unwelcome behaviors involving donors are responded to within 48 hours.
3. 100% of staff have required space to work based on their work arrangement in a hybrid workplace.
4. An increase in OUD's Intercultural Viability Indicator (IVI) measure over five years. The IVI measure informs our DEI priorities, helping us understand the relationship between individual competence and organizational support.
5. Gallup Survey results increase in score on the following statement, specifically for those with disabilities: "Everyone at this organization is treated fairly regardless of ethnic background, race, gender, age, disability, or other differences not related to job performance."

*Actions:*

1. Metric 1
  - a. Develop a change management process to enhance facilitation and meeting design, to be more inclusive of different learning and communications styles, in a way that is mindful of different hybrid work arrangements.
  - b. Develop guidance on diversifying the perspectives included on OUD committees and workgroups.
2. Metric 2
  - a. Roll out the formal process to report incidents of donor and constituent misconduct. This goes out to all of OUD and development staff across all three campuses and Michigan Medicine.

- b. Develop training to equip staff with skills to address unwelcome and unwanted behaviors.
  - c. Integrate trainings, such as “Managing Unwelcome Behavior in the Gray Zone,” into existing programming and processes.
  - d. Continue to implement the due diligence process and research.
3. Metric 3
- a. Recommend a strategy to determine how office space is allocated and used based on the planned staff work arrangements.
  - b. Develop a communications plan to share the space allocation process with OUD staff.
4. Metric 4
- a. Analyze the 2023 results of the IVI and develop one-year and three-year recommendations in FY24 for team and OUD-wide implementation. This will inform teams’ DEI priorities and how they will implement DEI.
5. Metric 5
- a. Publish and integrate into the employee life cycle how staff can request accommodations. This effort will allow those who self-report and/or identify as neurodivergent and/or disabled to more easily seek accommodation.
  - b. Educate staff on mental health and neurodiversity and provide recommendations for how OUD can foster a more accessible and inclusive workplace climate.

*Primary DEI Goal: Inclusion, Equity*

**Strategic Objective 3: Advance pay equity in compensation across OUD.**

*Metrics:*

- 1. OUD median salary of a job code or grouping is at or above the 50th percentile in comparison to others in the same job code at U-M.
- 2. Reduce the number and percentage of people citing “salary” as their primary reason for leaving OUD.
- 3. Achieve 1:1 pay ratio for gender and race.

*Actions:*

- 1. Metric 1
  - a. Verify groupings of job codes in OUD.
  - b. Conduct an annual review of organizational gaps and request funds for equity in our provost budget requests as needed. Strive to have all individual salaries at or above the 25th percentile for job codes that are reasonably utilized across all U-M data.
  - c. Conduct job code and peer analysis on new postings and individuals up for promotion/reclassification and involve University Human Resources (UHR) when necessary.
  - d. Establish two groups of OUD staff that can be used to design strategies and tactical compensation practices (i.e., Strategic Compensation Working Group and Implementation Compensation Working Group).
- 2. Metric 2
  - a. Assess and update data collection and interview questions in the OUD exit process.
  - b. Collaborate with internal communications leaders to design a communications

strategy that leads to more transparency and awareness of compensation practices.

3. Metric 3

- a. Establish how best to define this and identify a baseline.

*Primary DEI Goal: Equity*

## PRODUCTS (Support Innovative and Inclusive Teaching, Research, and Service)

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Strategies and action items for Products are designed to integrate DEI solutions into our educational program offerings and teaching methodology, and to ensure scholarly research on diversity, equity, and inclusion, and the scholars who produce it, are valued and supported. Note, many of the actions listed are multi-year efforts and began in year one.

### Donors

**Strategic Objective 1:** In support of OUD's mission, increase the diversity of the donor base, volunteer base, and campaign and leadership councils.

*Metrics:*

1. Use regional demographic data as a resource to inform strategies to increase diversity within OUD Volunteer Councils.
2. Engage donors in an equitable way, with specific attention to addressing any disparities related to donor race and gender.
3. 100% of OUD frontline fundraisers will conduct discovery visits as 10% to 20% of their annual visit total.

*Actions:*

1. Metric 1

- a. Identify source(s) and use demographics as a reference point to develop inclusive best practices for volunteer recruitment in Michigan's 15 regional markets that will have campaign councils.
- b. Serve as strategic partners to fundraising and DEI teams in achieving their DEI-related priorities through events in regional, national, and global markets.
- c. Ensure representation in the David B. Hermelin Award for Fundraising Volunteer Leadership process, which represents a diversity of perspectives, from recruitment to selection committee through the nomination process and awardee selection.
- d. Submit to the OUD Prospect Development and Analytics team the names of donors from the Milestone Giving Program who currently do not have an active prospective manager at the major donor level.
- e. Develop process to ascertain demographic data from new council members during standardized onboarding process.

2. Metric 2

- a. Develop and execute a change management plan around entering plan and visit

- data into DART, U-M's donor database.
  - b. Enter race and pronoun data collected via varying survey instruments. Make sure that there are appropriate protocols around data usage before entering.
  - c. Develop reporting and tools to support new measures of portfolio engagement (year one and year two).
  - d. Integrate pronouns into user/profile, survey forms, or other OUS tools.
  - e. Continue to learn about and test strategies for engagement of individuals and communities reflecting a broader diversity of perspectives and interests.
3. Metric 3
- a. Review progress in standing one-on-one meetings between direct reports and managers as well as in performance appraisals and work plan meetings.
  - b. Ensure that gift officers enter visits as "discovery" in DART.
  - c. Execute the First 100 and Second 100 referral programs.
  - d. Conduct stewardship phone visits then feed names, if appropriate, to frontline fundraisers for a discovery visit.

*Primary DEI Goal: Diversity*

**Strategic Objective 2:** Identify, fundraise for, support, and track progress on fundraising for DEI priorities across all three campuses and Michigan Medicine.

*Metrics:*

1. Raise \$1 million in production for the Office of Diversity, Equity and Inclusion (ODEI) priorities a year.
2. Increased number of donors and giving to DEI fundraising priorities across all three campuses and Michigan Medicine.

*Actions:*

1. Metric 1
  - a. Conduct 140+ visits a year with prospective and current donors.
  - b. Partner with key fundraising teams in OUD and development staff across all three campuses and Michigan Medicine to provide salient information about match and partnering opportunities.
  - c. Implement Giving Bluesday strategy, including increasing the number of ODEI fundraising ambassadors.
  - d. Serve as strategic partners to fundraising and DEI teams in achieving their DEI-related priorities through events in regional, national, and global markets.
2. Metric 2
  - a. Continue to work with ODEI to annually collect updated DEI fundraising priorities through the DEI 2.0 strategic planning process.
  - b. Produce impact reports for collaborative initiatives with a DEI focus, specifically Wolverine Pathways impact report; Undergraduate Laptop Program impact report; and reports on Go Blue Guarantee
  - c. Produce a marketing and communications yearly fundraising report of efforts for DEI-specific fundraising (across all three campuses and Michigan Medicine) that the OUD Marketing and Communications team participates in or leads, to assess progress and changes.

- d. Identify and produce Leaders and Best stories that focus on DEI fundraising across all three campuses and Michigan Medicine.
- e. Report on project metrics that focus on DEI fundraising across all three campuses and Michigan Medicine.
- f. Create social media posts focused on DEI fundraising across all three campuses and Michigan Medicine.
- g. Document digital accessibility presentations and education efforts. Disperse resources on digital accessibility to support OUD teams and colleagues in integrating accessibility standards into their work.
- h. Create a style guide on DEI-related content and share it with development staff across all three campuses and the Michigan Medicine community, incorporating past DEI feedback.
- i. Seek out and support at least three DEI-focused crowdfunding campaigns.
- j. Develop and implement a plan for promoting regionally focused scholarships through digital channels that occasionally converge with targeted in-person events. Areas of emphasis will be funds focused on India, China, Southeast Asia, the Middle East, and South America.
- k. Amplify DEI fundraising priorities through regional councils and one-on-one meetings.

*Primary DEI Goal: Equity*

**Strategic Objective 3:** Create and modify infrastructure, outreach, and processes to fundraise for DEI priorities and broadly diversify Michigan’s donor base.

*Metrics:*

1. Meaningful increase in and engagement of broadly diverse populations in traditionally exclusive event settings, communications, and engagement opportunities.

*Actions:*

1. Metric 1
  - a. Provide greater access to President Santa Ono and Provost Laurie McCauley to ensure that donors from all backgrounds and perspectives feel engaged and valued, especially keeping in mind those from marginalized and underrepresented identities and backgrounds.
  - b. Ensure that constituents (donors, alumni, faculty, staff, and students) invited to speak at events represent a broad diversity of perspectives.
  - c. Build a process to review guest lists from a DEI lens to ensure that constituents invited to events represent the diversity that exists within society. This entails understanding what data is available, bringing DEI perspectives and priorities into conversations on guest lists at the beginning of the event planning process, and automating this process to ensure it occurs for every event.
  - d. Enter race and pronoun data collected via varying survey instruments. Make sure that there are appropriate protocols around data usage before entering.
  - e. Continue to implement strategies to increase development staff use of the Stewardship Special Communications Form in order to create transparency, promote equitable access for staff requesting special donor communications from the

President and/or Vice President for Development, and strengthen relationships between university leadership and U-M's broadly diverse population of donors and volunteers

- f. Incorporate DEI principles into our OUD collateral review and production process for donor-facing communications.
- g. Recommend a process to deliver targeted email projects and communications, particularly to those from underrepresented identities and backgrounds, utilizing data requests from Marketing and Communications to create a foundation for awareness and future improvement.
- h. Make legal name changes from PeopleSoft integration into DART, U-M's donor database.
- i. Ensure our digital content is accessible and inclusive of the needs of our users so that they can access our websites, PDFs and email, and give online.
- j. Capture and code DEI-related data (i.e. DEI-related interests) in DART while ensuring sustainability, accuracy, and appropriate usage.
- k. Review and provide feedback on campaign case statements from schools, colleges, campuses, and units that opt in, for DEI feedback to ensure that our donors from all backgrounds and perspectives feel connected to our campaign priorities. This effort helps ensure that DEI is represented and integrated into the Look to Michigan campaign

*Primary DEI Goal: Inclusion*

# Goal-related Metrics—OUD Measures Tracked Over Time

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## School, College, or Unit Metrics:

In advancing DEI, OUD will track the following key metrics:

### **Unit Assessment**

- Intercultural Viability Indicator™ Assessment Results (Taken in 2023; to be taken in 2026 and 2028)

### **Staff**

- Demographic composition of OUD workforce:
  - Headcount
  - Race/Ethnicity
  - Sex
  - Age (Generation cohort)
  - Disabilities
  - Veteran status
  - In DEI 2.0, we hope to collect self-reported data on more identities, such as LGBTQIA+, to better understand possible trends by groups and communities.
- Demographic composition of OUD Leadership, including at the director level and the senior leadership level (based on data that is readily accessible)
- Turnover rate of people of color (including turnover reporting and trends in exit interviews and surveys)
- Aggregated compensation data
- Climate survey indicators (sample indicators listed below):
  - 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
- Gallup Q12 Engagement Survey Topics (engagement, culture, DEI, and hybrid work)

### **Applicants**



- Demographic composition of OUD applicants (aggregate data only) throughout each step of the hiring process (race, gender, disabilities, and veteran status)

**Fundraising**

Given that we are building and enhancing infrastructure to measure our progress in diversifying U-M’s donor base and fundraising for DEI priorities, the extent to which we are able to measure the following metrics will depend on the progress made on year one actions. The metrics cover what we intend to measure by the end of year five, if not sooner.

- Total funds raised for DEI fundraising priorities across all three campuses and Michigan Medicine
- Total donors for DEI fundraising priorities across all three campuses and Michigan Medicine
- Total funds raised for the Office of Diversity, Equity and Inclusion (ODEI) annually
- Demographic composition of volunteer councils
- When possible, the demographic composition of donors and volunteers that participate in key development activities. As noted in this plan, accurate numbers are dependent on our ability to increase voluntary self-reporting from donors.
- Engagement rates by identity (starting with race and gender) which measure the rate at which managed prospective donors are visited for the purpose of fundraising. As noted in this plan, accurate numbers are dependent on our ability to increase voluntary self-reporting from donors.
- The percentage of discovery prospect visits conducted annually

## Action Planning Tables with Details and Accountabilities

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**PEOPLE (Recruitment, Retention, & Development)**

<b>Strategic Objective #1:</b> Integrate diversity, equity, and inclusion strategies into every phase of the employee life cycle, resulting in an increasingly multicultural OUD workforce where staff can be their best selves and do their best work.		<b>Key Constituency:</b> Staff
<b>Associated Metrics</b>	<b>Detailed Actions Plan (measurable, specific)</b>	<b>Groups Accountable</b> <i>*indicates primary owner</i>
<b>Metric #1:</b> 100% of the time, the percentage of underrepresented applicants to jobs at OUD meets or exceeds the availability data on the qualified labor pool (based on specific job codes) from the U.S. Census for	<b>Action #1:</b> Conduct proactive outreach to source prospective applicants and feed candidate pipelines.	People & Culture; Hiring Managers
	<b>Action #2:</b> Utilize DataPeople tool to create inclusive job advertisements that attract deep and broadly diverse applicant pools.	People & Culture

each search. Based on data availability, we will continue to evaluate race, gender, veteran status, and disabilities.	<b>Action #3:</b> Utilize Biteable tool to create inclusive videos that can be used to help attract applicants.	People & Culture
	<b>Action #4:</b> Advance careers marketing efforts in collaboration with OUD Marketing and Communications.	People & Culture; Marketing and Communications
<b>Metric #2:</b> Increase diversity of OUD staff, including the Extended Leadership Team level (Directors and Leadership Team) based on readily available demographic data.	<b>Action #1:</b> Utilize pre-scripted interview questions, blind resumes, and include a colleague as a “bias checker” in decision making moments in order to reduce any potential bias throughout the hiring process.	People & Culture
	<b>Action #2:</b> Track and report on aggregate demographic data for all of OUD and also specifically, Extended Leadership Team (Directors and Leadership Team) on an annual basis.	People & Culture
	<b>Action #3:</b> Continue to implement workforce planning efforts with Leadership Team.	People & Culture; Leadership Team
	<b>Action #4:</b> Require interview training for all hiring managers.	People & Culture; Hiring Managers
	<b>Action #5:</b> Require unconscious bias training for anyone involved in a search.	People & Culture; Hiring Teams

<b>Strategic Objective #2:</b> Implement proactive retention strategies with a focus on valuing the unique perspectives of and addressing the unique disparities that may be faced by those from underrepresented identities and backgrounds. In particular, we aim to address the disproportionately high turnover of staff of color, knowing that in addressing this unique issue we will develop robust practices that benefit all staff.		<b>Key Constituency:</b> Staff
<b>Associated Metrics</b>	<b>Detailed Actions Plan (measurable, specific)</b>	<b>Groups Accountable</b> <i>*indicates primary owner</i>
<b>Metric #1:</b> Reach proportional turnover within OUD, particularly between white staff and staff of color who exit OUD.	<b>Action #1:</b> Develop and communicate pathways for addressing unwelcome behavior, including resources, training, support, and reporting options.	DEI*; People & Culture
	<b>Action #2:</b> Revise staff competencies to incorporate intercultural competency.	DEI*; People & Culture
	<b>Action #3:</b> Celebrate and recognize heritage months/days through monthly	DEI*; People & Culture; Marketing and

	communications and bi-monthly to quarterly programming.	Communications
	<b>Action #4:</b> Seek buy-in and support of OUD's recently established Career Navigation Definition & Philosophy and begin executing on a multi-year project plan to implement resources and support.	People & Culture
	<b>Action #5:</b> Complete needs assessment to identify the type of support to managers and leaders that will be most effective in promoting meaningful conversations with staff.	People & Culture
	<b>Action #6:</b> Enhance the overall onboarding experience.	People & Culture
	<b>Action #7:</b> Enhance the process of soliciting feedback from new hires regarding their onboarding experience and continue to use that feedback to make improvements along the way.	People & Culture
	<b>Action #8:</b> Develop a plan for manager and leadership support based on needs assessment.	People & Culture

### PROCESS (Promoting an Equitable & Inclusive Community)

Strategic Objective #1: Incorporate the DEI strategic plan into the OUD-wide and team plans..		Key Constituency: Staff
Associated Metrics	Detailed Actions Plan (measurable, specific)	Groups Accountable <i>*indicates primary owner</i>
<b>Metric #1:</b> 100% of teams have DEI objectives/efforts present in their annual team plan.	<b>Action #1:</b> Modify the annual planning process to add DEI prompts and language to team planning requirements.	DEI; Organizational Strategy
	<b>Action #2:</b> Every team plan will have at least one objective that will impact DEI efforts.	DEI; Organizational Strategy
	<b>Action #3:</b> Include regular updates of DEI metrics in quarterly reports.	DEI; Organizational Strategy

<p><b>Metric #2:</b> An increase in OUD’s Intercultural Viability Indicator (IVI) measure over five years. The IVI measure informs our DEI priorities, helping us understand the relationship between individual competence and organizational support.</p>	<p><b>Action #1:</b> Analyze the 2023 results of the IVI and develop one-year and three-year recommendations in FY24 for team and OUD-wide implementation. This will inform teams’ DEI priorities and how they will implement DEI.</p>	<p>DEI</p>
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<p><b>Strategic Objective #2:</b> Advance a healthy culture that values the contributions and perspectives of all OUD staff.</p>		<p><b>Key Constituency:</b> Staff</p>
<p><b>Associated Metrics</b></p>	<p><b>Detailed Actions Plan (measurable, specific)</b></p>	<p><b>Groups Accountable</b> <i>*indicates primary owner</i></p>
<p><b>Metric #1:</b> Gallup survey results increase in score on the statement, “DEI4: My organization treasures diverse opinions and ideas.”</p>	<p><b>Action #1:</b> Develop a change management process to enhance facilitation and meeting design, to be more inclusive of different learning and communications styles, in a way that is mindful of different hybrid work arrangements.</p>	<p>DEI; Organizational Strategy</p>
	<p><b>Action #2:</b> Develop guidance on diversifying the perspectives included on OUD committees and workgroups.</p>	<p>DEI*; those leading OUD-wide committees</p>
<p><b>Metric #2:</b> 100% of reports of unwelcome behaviors involving donors are responded to within 48 hours.</p>	<p><b>Action #1:</b> Roll out the formal process to report incidents of donor and constituent misconduct. This goes out to all of OUD and development staff across all three campuses and Michigan Medicine.</p>	<p>Situational Response Team (SRT)</p>
	<p><b>Action #2:</b> Develop training to equip staff with skills to address unwelcome behaviors.</p>	<p>DEI</p>
	<p><b>Action #3:</b> Integrate trainings, such as “Managing Unwelcome Behavior in the Gray Zone,” into existing programming and processes.</p>	<p>DEI*; People &amp; Culture</p>
	<p><b>Action #4:</b> Continue to implement the due diligence process and research.</p>	<p>Prospect Development and Analytics</p>
<p><b>Metric #3:</b> 100% of staff have required space to work based on their work arrangement in a hybrid workplace.</p>	<p><b>Action #1:</b> Recommend a strategy to determine how office space is allocated and used based on the planned staff work arrangements.</p>	<p>Finance and Administration*; Space Committee</p>

	<b>Action #2:</b> Develop a communications plan to share the space allocation process with OUD staff.	Finance and Administration*; Space Committee; Organizational Strategy
<b>Metric #4:</b> An increase in OUD’s Intercultural Viability Indicator (IVI) measure over five years. The IVI measure informs our DEI priorities, helping us understand the relationship between individual competence and organizational support.	<b>Action #1:</b> Analyze the 2023 results of the IVI and develop one-year and three-year recommendations in FY24 for team and OUD-wide implementation. This will inform teams’ DEI priorities and how they will implement DEI.	DEI
<b>Metric #5:</b> Gallup Survey results increase in score on the following statement, specifically for those with disabilities: “Everyone at this organization is treated fairly regardless of ethnic background, race, gender, age, disability, or other differences not related to job performance.”	<b>Action #1:</b> Publish and integrate into the employee life cycle how staff can request accommodations. This effort will allow those who self-report and/or identify as neurodivergent and/or disabled to more easily seek accommodation.  Where possible, we plan for and make accommodations in our everyday operations and practices. In this specific action item, we want to ensure that individuals are comfortable coming forward with a request where it is not already prompted and/or in regards to circumstances that are confidential to the employee.	DEI; People & Culture
	<b>Action #2:</b> Educate staff on mental health and neurodiversity and provide recommendations for how OUD can foster a more accessible and inclusive workplace climate.	DEI

<b>Strategic Objective #3:</b> Advance pay equity in compensation across OUD.		<b>Key Constituency:</b> Staff
<b>Associated Metrics</b>	<b>Detailed Actions Plan (measurable, specific)</b>	<b>Groups Accountable</b> <i>*indicates primary owner</i>
<b>Metric #1:</b> OUD median salary of a job code or grouping is at or above the 50th percentile in comparison to others in the same job code at U-M.	<b>Action #1:</b> Verify groupings of job codes in OUD.	Finance and Administration
	<b>Action #2:</b> Conduct an annual review of	Finance and

	organizational gaps and request funds for equity in our provost budget requests as needed. Strive to have all individual salaries at or above the 25th percentile for job codes that are reasonably utilized across all U-M data.	Administration
	<b>Action #3:</b> Conduct job code and peer analysis on new postings and individuals up for promotion/reclassification and involve University Human Resources (UHR) when necessary.	People & Culture
	<b>Action #4:</b> Establish two groups of OUD staff that can be used to design strategies and tactical compensation practices (i.e., Strategic Compensation Working Group and Implementation Compensation Working Group).	Compensation Working Group
<b>Metric #2:</b> Reduce the number and percentage of people citing “salary” as their primary reason for leaving OUD.	<b>Action #1:</b> Assess and update data collection and interview questions in the OUD exit process.	People & Culture
	<b>Action #2:</b> Collaborate with internal communications leaders to design a communications strategy that leads to more transparency and awareness of compensation practices.	Compensation Working Group
<b>Metric #3:</b> Achieve 1:1 pay ratio for gender and race.	<b>Action #1:</b> Establish how best to define this and identify a baseline.	Compensation Working Group

### PRODUCTS (Education, Scholarship, & Service)

<b>Strategic Objective #1:</b> In support of OUD’s mission, increase the diversity of the donor base, volunteer base, and campaign and leadership councils.		<b>Key Constituency:</b> Donors
<b>Associated Metrics</b>	<b>Detailed Actions Plan (measurable, specific)</b>	<b>Groups Accountable</b> <i>*indicates primary owner</i>
<b>Metric #1:</b> Use regional demographic data as a resource to inform strategies to increase diversity within OUD Volunteer Councils.	<b>Action #1:</b> Identify source(s) and use demographics as a reference point to develop inclusive best practices for volunteer recruitment in Michigan’s 15 regional markets that will have campaign councils.	All fundraising teams

	<p><b>Action #2:</b> Serve as strategic partners to fundraising and DEI teams in achieving their DEI-related priorities through events in regional, national, and global markets.</p>	University and Development Events
	<p><b>Action #3:</b> Ensure representation in the David B. Hermelin Award for Fundraising Volunteer Leadership process, which represents a diversity of perspectives, from recruitment to selection committee through the nomination process and awardee selection.</p>	Stewardship and Donor Relations
	<p><b>Action #4:</b> Submit to the OUD Prospect Development and Analytics team the names of donors from the Milestone Giving Program who currently do not have an active prospective manager at the major donor level.</p>	Stewardship and Donor Relations
	<p><b>Action #5:</b> Develop process to ascertain demographic data from new council members during standardized onboarding process.</p>	National Major Gifts
<p><b>Metric #2:</b> Engage donors in an equitable way, with specific attention to addressing any disparities related to donor race and gender.</p>	<p><b>Action #1:</b> Develop and execute a change management plan around entering plan and visit data into DART, U-M's donor database.</p>	Prospect Development and Analytics
	<p><b>Action #2:</b> Enter race and pronoun data collected via varying survey instruments. Make sure that there are appropriate protocols around data usage before entering.</p>	Prospect Development and Analytics; Integrated Data Services
	<p><b>Action #3:</b> Develop reporting and tools to support new measures of portfolio engagement (year one and year two).</p>	Prospect Development and Analytics; Integrated Data Services; Data Science and Decision Support
	<p><b>Action #4:</b> Integrate pronouns into user/profile, survey forms, or other OUS tools.</p>	Digital Infrastructure
	<p><b>Action #5:</b> Continue to learn about and test strategies for engagement of individuals and communities reflecting a broader diversity of perspectives and interests.</p>	National Major Gifts; DEI; Planned Giving

<b>Metric #3:</b> 100% of OUD frontline fundraisers will conduct discovery visits as 10% to 20% of their annual visit total.	<b>Action #1:</b> Review progress in standing one-on-one meetings between direct reports and managers as well as in performance appraisals and work plan meetings.	All fundraising teams
	<b>Action #2:</b> Ensure that gift officers enter visits as “discovery” in DART.	All fundraising teams; Prospect Development and Analytics; Integrated Data Services
	<b>Action #3:</b> Execute the First 100 and Second 100 referral programs.	Prospect Development and Analytics
	<b>Action #4:</b> Conduct stewardship phone visits then feed names, if appropriate, to frontline fundraisers for a discovery visit.	Stewardship and Donor Relations

<b>Strategic Objective #2:</b> Identify, fundraise for, support, and track progress on fundraising for DEI priorities across all three campuses and Michigan Medicine.		<b>Key Constituency:</b> Donors
<b>Associated Metrics</b>	<b>Detailed Actions Plan (measurable, specific)</b>	<b>Groups Accountable</b> <i>*indicates primary owner</i>
<b>Metric #1:</b> Raise \$1 million in production for the Office of Diversity, Equity and Inclusion (ODEI) priorities a year.	<b>Action #1:</b> Conduct 140+ visits a year with prospective and current donors.	DEI
	<b>Action #2:</b> Partner with key fundraising teams in OUD and development staff across all three campuses and Michigan Medicine to provide salient information about match and partnering opportunities.	DEI
	<b>Action #3:</b> Implement Giving Bluesday Strategy, including increasing the number of ODEI fundraising ambassadors.	DEI
	<b>Action #4:</b> Serve as strategic partners to fundraising and DEI teams in achieving their DEI-related priorities through events in regional, national, and global markets.	University and Development Events
<b>Metric #2:</b> Increased number of donors and giving to DEI fundraising priorities across all three campuses and Michigan Medicine.	<b>Action #1:</b> Continue to work with ODEI to annually collect updated DEI fundraising priorities through the DEI 2.0 strategic planning process.	DEI
	<b>Action #2:</b> Produce impact reports for	Stewardship and Donor



	collaborative initiatives with a DEI focus, specifically Wolverine Pathways impact report; Undergraduate Laptop Program impact report; and reports on Go Blue Guarantee.	Relations
	<b>Action #3:</b> Produce a marketing and communications yearly fundraising report of efforts for DEI-specific fundraising (across all three campuses and Michigan Medicine) that the OUD Marketing and Communications team participates in or leads, to assess progress and changes.	Marketing and Communications
	<b>Action #4:</b> Identify and produce Leaders and Best stories that focus on DEI fundraising across all three campuses and Michigan Medicine.	Marketing and Communications
	<b>Action #5:</b> Report on project metrics that focus on DEI fundraising across all three campuses and Michigan Medicine.	Marketing and Communications
	<b>Action #6:</b> Create social media posts focused on DEI fundraising across all three campuses and Michigan Medicine.	Marketing and Communications; DEI
	<b>Action #7:</b> Document digital accessibility presentations and education efforts. Disperse resources on digital accessibility to support OUD teams and colleagues in integrating accessibility standards into their work.	Marketing and Communications
	<b>Action #8:</b> Create a style guide on DEI-related content and share it with development staff across all three campuses and Michigan Medicine community, incorporating past DEI feedback.	Marketing and Communications
	<b>Action #9:</b> Seek out and support at least three DEI-focused crowdfunding campaigns.	Annual Giving
	<b>Action #10:</b> Develop and implement a plan for promoting regionally focused scholarships through digital channels that occasionally converge with targeted in-person events. Areas of emphasis will be funds focused on India, China, Southeast	International Giving

	Asia, the Middle East, and South America.	
	<b>Action #11:</b> Amplify DEI fundraising priorities through regional councils and one-on-one meetings.	DEI; National Major Gifts; Planned Giving; Parent & Family Giving and Student Life

<b>Strategic Objective #3:</b> Create and modify infrastructure, outreach, and processes to fundraise for DEI priorities and broadly diversify Michigan's donor base.		<b>Key Constituency:</b> Donors
<b>Associated Metrics</b>	<b>Detailed Actions Plan (measurable,specific)</b>	<b>Groups Accountable</b> <i>*indicates primary owner</i>
<b>Metric #1:</b> Meaningful increase in and engagement of broadly diverse populations in traditionally exclusive event settings, communications, and engagement opportunities.	<b>Action #1:</b> Provide greater access to President Santa Ono and Provost Laurie McCauley to ensure that donors from all backgrounds and perspectives feel engaged and valued, especially keeping in mind those from marginalized and underrepresented identities and backgrounds.	University and Development Events
	<b>Action #2:</b> Ensure that constituents (donors, alumni, faculty, staff, and students) invited to speak at events represent a broad diversity of perspectives.	University and Development Events; Stewardship and Donor Relations
	<b>Action #3:</b> Build a process to review guest lists from a DEI lens to ensure that constituents invited to events represent a broad diversity of perspectives. This entails understanding what data is available, bringing DEI perspectives and priorities into conversations on guest lists at the beginning of the event planning process, and automating this process to ensure it occurs for every event.	University and Development Events
	<b>Action #4:</b> Enter race and pronoun data collected via varying survey instruments. Make sure that there are appropriate protocols around data usage before entering.	Prospect Development and Analytics; Integrated Data Services
	<b>Action #5:</b> Continue to implement strategies to increase development staff use of the Stewardship Special Communications Form in order to create transparency, promote	Stewardship and Donor Relations

	equitable access for staff requesting special donor communications from the President and/or Vice President for Development, and strengthen relationships between university leadership and U-M's diverse population of donors and volunteers	
	<b>Action #6:</b> Incorporate DEI principles into our OUD collateral review and production process for donor-facing communications.	Marketing and Communications; Annual Giving; Stewardship and Donor Relations
	<b>Action #7:</b> Recommend a process to deliver targeted email projects and communications, particularly to those from underrepresented identities and backgrounds, utilizing data requests from Marketing and Communications to create a foundation for awareness and future improvement.	Marketing and Communications
	<b>Action #8:</b> Make legal name changes from PeopleSoft integration into DART, U-M's donor database.	Gift and Records Administration
	<b>Action #9:</b> Ensure our digital content is accessible and inclusive of the needs of our users so that they can access our websites, PDFs and email, and give online.	Digital Infrastructure
	<b>Action #10:</b> Capture and code DEI-related data (i.e. DEI-related interests) in DART while ensuring sustainability, accuracy, and appropriate usage.	Gift and Records Administration
	<b>Action #11:</b> Review and provide feedback on campaign case statements from schools, colleges, campuses, and units that opt in, for DEI feedback to ensure that our donors from all backgrounds and perspectives feel connected to our campaign priorities. This effort helps ensure that DEI is represented and integrated into the Look to Michigan campaign, as a core commitment along with the arts.	DEI*; Campaign Strategy and Initiatives

## Plans for Supporting, Tracking, and Updating the

# Strategic Plan

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DEI leads Kalia Vang and Kat Walsh are the key contacts for stewardship of OUD's DEI 2.0 Strategic Plan. They will be assisted by OUD Organizational Strategy, OUD People & Culture, OUD Finance and Administration, and the DEI Core Team in tracking and supporting plan implementation. Under the direction of OUD DEI, these groups will take part in an annual review of the DEI 2.0 plan with all relevant constituencies and gather feedback and additional ideas to be implemented throughout the year. As listed in the strategic plan, many OUD teams and OUD-wide working groups will regularly collect data and implement key DEI efforts. In FY25, we will seek feedback from staff (including student staff and interns) through the following engagement opportunities: the annual Gallup Q12 Survey, annual all staff meeting (typically in February or March), regular office hours hosted by multiple teams, feedback surveys (specific to projects and initiatives), and meetings at the leadership, team, and individual levels to ensure that the DEI 2.0 Strategic Plan is responsive to changing needs in fundraising and in advancing a healthy workplace climate.

In collaboration with OUD DEI, Organizational Strategy conducts the annual planning process in which OUD leadership and teams determine OUD-wide goals and strategies for the upcoming fiscal year. Organizational Strategy collects updates on OUD's priorities, including the DEI strategic objectives, metrics, and actions outlined in this plan. Integrating DEI 2.0 into our unit-wide strategic annual planning provided essential and familiar infrastructure to support teams and staff in making progress on DEI actions toward our five-year strategic objectives. As we prepare for the public campaign launch in October, the overall organizational plan in the near term is being built to incorporate DEI-related action items. Since OUD's long-term strategy and success depend on expanding those invited to the table of university philanthropy, we will continue to integrate DEI 2.0 in both initiatives and metrics.

With contributions from partners and project owners, OUD DEI will annually release preliminary findings in the spring of our progress and recommendations to be presented to OUD leadership and staff. This will aid us in modifying and determining action items for the subsequent fiscal year. A final report, the DEI Annual Report, will be published in July of the following fiscal year providing an update on our yearly progress.

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## Appendix: Previous DEI 2.0 Efforts

This appendix shares past DEI actions, metrics, or strategic objectives which will no longer continue as of the most recent version of the DEI 2.0 Strategic Plan. To access the year one plan, please [view](#). For any questions, you may contact Kalia Vang, OUD DEI Project Manager

([kaliav@umich.edu](mailto:kaliav@umich.edu)).

## DEI Actions by Distal Strategic Objective

### PEOPLE (Recruitment, Retention, & Development)

<b>Strategic Objective #2:</b> Implement proactive retention strategies with a focus on valuing the unique perspectives of and addressing the unique disparities that may be faced by those from underrepresented identities and backgrounds.		
In particular, we aim to address the disproportionately high turnover of staff of color, knowing that in addressing this unique issue, we will develop robust practices that benefit all staff.		
FY24	Status: Completed in Year One	Define career advancement and OUD's philosophy around career pathways.
FY24	Status: Completed in Year One	Test out and amplify U-M Organizational Learning's DEI learning suite.

### PROCESS (Promoting an Equitable & Inclusive Community)

<b>Strategic Objective #1:</b> Incorporate the DEI strategic plan into the OUD-wide and team annual planning process.		
FY24	Status: Not Started due to a lack of funds	Develop and acquire tailored change management processes and resources to support OUD-wide and team implementation of DEI in their core work.

<b>Strategic Objective #3:</b> Advance pay equity in compensation across OUD.		
FY24	Status: Completed in Year One	Identify a baseline.

### PRODUCTS (Education, Scholarship, & Service)

<b>Strategic Objective #1:</b> In support of OUD's mission, increase the diversity of the donor base, volunteer base, and campaign and leadership councils.		
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FY24	Status: Completed in Year One	Submit the David B. Hermelin Award for Fundraising Volunteer Leadership for the CASE Annual Conference for Donor Relations Professionals. If selected to present, a section will be included on our DEI focus on staff committee participation and how we encourage a broadly diverse pool of nominees.
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**Strategic Objective #2:** Identify, fundraise for, support, and track progress on fundraising for DEI priorities across all three campuses and Michigan Medicine.

FY24	Status: Alternative strategy to be determined in FY25	Investigate the ability to use DART (U-M's donor database) to track and tag foundation funding for work by, among others, faculty of color and work done in communities of color, in order to establish a baseline and set and achieve goals for growth in DEI-related fundraising.
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