



# Office of University Development (OUD)

*Diversity, Equity, and Inclusion Strategic Plan | FY 2024*

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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 mission, 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. 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 activities and communications.

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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.

## 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.

## 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, 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 of Donor Digital Experience and Digital Hub  
Elizabeth Devlin, Executive Assistant, Campaign Strategy & Initiatives and Development Services & Strategic Solutions  
Katie Linder, Associate Director of Foundation Relations  
Stephanie Marengere, Senior Event Logistics Manager  
Paul Morin, Associate Director, Digital Fundraising  
Adrienne Nwachukwu, Project Manager, Marketing and Communications  
Gayatri Penmetsa, Director, International Giving and Engagement  
Becky Reames, Assistant Director, Digital Operations  
Abigail Riley, Assistant Director of Stewardship & Donor Relations  
Lauren Smott, Associate Director, Guest Experience and Event Reporting  
Leah Warshaw, Assistant Director, Culture & Engagement  
Halley Widlak, Senior Budget Analyst  
Jessica Wolma, Prospect Management Analyst  
Liyan Zhang, Finance Controls Manager

### **ODD 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, Director of 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 and Lead of the Development Professionals of Color (DPOC)  
Maddie Swanson, Senior Communications Specialist and Co-chair of the Early Career Professionals Committee (ECPC)  
David Zubl, Director, Learning & Engagement

### **ODD 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  
Amy Lavi, Senior Director, Talent Relations

Maurice Nelson, Director of Talent Acquisition  
Sarah Salomon, Executive Director, People & Culture  
Leah Warshaw, Assistant Director, Culture & Engagement  
David Zubl, Director, Learning & Engagement

## 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).
- 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 MCO 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 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 the development community, sharing recommendations to advance racial equity and improve the experiences of 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 diversify the applicant pools for future postings, and the

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



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.

### **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>3</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>4</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

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<sup>3</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>4</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.

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

## **Gender<sup>5</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.

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<sup>5</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.

### *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 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 unwanted and 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 antiracist
  - 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 unwanted and 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 and unwanted 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 introductory 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 introductory 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>6</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

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<sup>6</sup> All strategic objectives and related actions will be pursued in accordance with the law and university policy.

objectives. For additional detail on assignments, timelines, and accountabilities, see the Action Planning Table.

## PEOPLE (Recruit, Retain & Develop a Diverse 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.

### 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 or unwanted 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. Define career advancement and OUD's philosophy around career pathways.
  - e. Test out and amplify U-M Organizational Learning's DEI learning suite.
  - f. Conduct a needs assessment to identify the type of support to managers and leaders that will be most effective in promoting meaningful conversations with staff.
  - g. Enhance the overall onboarding experience.
  - h. 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.

*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.

### **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. Review submitted team plans for DEI objectives, key performance indicators (KPIs), and projects, and follow up with those who do not reference DEI.
  - 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.
  - b. Develop and acquire tailored change management processes and resources to support OUD-wide and team implementation of DEI in their core work.

*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 and unwanted 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.

*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 the development community (schools, colleges, campuses, and units).
  - b. Develop training to equip staff with skills to address unwelcome and unwanted behaviors.
  - c. Integrate trainings, such as "Managing Unwanted or 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.
  - b. Develop and acquire tailored change management processes and resources to support OUD-wide and team implementation of DEI in their core work.

*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 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. Identify a baseline.
  - c. 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.

## 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 introductory 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 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.
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 and year two).
  - d. Integrate pronouns into user/profile, survey forms, or other OUS tools.
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 “introductory” in DART.
  - c. Execute the First 100 and Second 100 referral programs.

*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 across the development community to provide salient information about match and partnering opportunities.
- c. Implement Giving Blueday 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. Work with ODEI to collect priorities submitted through the DEI 2.0 strategic planning process.
- b. Increase the number of impact reports and stewardship moves for collaborative initiatives with a DEI focus, specifically: produce Wolverine Pathways impact report, Undergraduate Laptop Program impact report, and reports on Go Blue Guarantee and/or HAIL programs.
- 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. 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.

*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 change management strategy and develop communications strategy to increase development staff use of the Stewardship Special Communications Form in order to create transparency and equitable access for the U-M development community in requesting special donor communications from the President and/or Vice President for Development. This modification in infrastructure will allow development staff across U-M to strengthen relationships between university leadership with U-M's globally diverse population of donors and volunteers.
- f. Incorporate DEI principles into our OUD collateral review and production process for donor-facing communications.
- g. Recommend and socialize 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.

*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 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 self-reporting from donors)
- Engagement rates by race and gender, which measure the rate at which prospective donors are visited for the purpose of fundraising (as noted in this plan, accurate numbers are dependent on our ability to increase self-reporting from donors)
- The percentage of introductory donor visits conducted annually

## Action Planning Tables with Details and Accountabilities

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

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.		Key Constituency: Staff
Associated Metrics	Detailed Actions Plan (measurable, specific)	Groups Accountable <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 each search. Based on data availability, we will continue to evaluate race, gender, veteran status, and disabilities.	<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
	<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	<b>Action #1:</b> Utilize pre-scripted interview	People & Culture

staff, including the Extended Leadership Team level (Directors and Leadership Team) based on readily available demographic data.	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>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 or unwanted 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 communications and bi-monthly to quarterly programming.	DEI*; People & Culture; Marketing and Communications
	<b>Action #4:</b> Define career advancement and OUD's philosophy around career pathways.	People & Culture
	<b>Action #5:</b> Test out and amplify U-M Organizational Learning's DEI learning suite.	People & Culture*; DEI

	<b>Action #6:</b> Conduct a 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 #7:</b> Enhance the overall onboarding experience.	People & Culture
	<b>Action #8:</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

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

Strategic Objective #1: Incorporate the DEI strategic plan into the OUD-wide and team annual planning process.		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> Review submitted team plans for DEI objectives, key performance indicators (KPIs), and projects, and follow up with those who do not reference DEI.	DEI; Organizational Strategy
	<b>Action #3:</b> Include regular updates of DEI metrics in quarterly reports.	DEI; Organizational Strategy
<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.	<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>Action #2:</b> Develop and acquire tailored change management processes and resources to support OUD-wide and team implementation of DEI in their core work.	DEI; Organizational Strategy

Strategic Objective #2: Advance a healthy culture that values the contributions and perspectives of all OUD staff.		Key Constituency: Staff
Associated Metrics	Detailed Actions Plan (measurable, specific)	Groups Accountable <i>*indicates primary owner</i>
<b>Metric #1:</b> Gallup survey results increase in score on the statement, “DEI4: My organization treasures diverse opinions and ideas.”	<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.	DEI; Organizational Strategy
	<b>Action #2:</b> Develop guidance on diversifying the perspectives included on OUD committees and workgroups.	DEI*; those leading OUD-wide committees
<b>Metric #2:</b> 100% of reports of unwelcome and unwanted behaviors involving donors are responded to within 48 hours.	<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 the development community (schools, colleges, campuses, and units).	Situational Response Team (SRT)
	<b>Action #2:</b> Develop training to equip staff with skills to address unwelcome and unwanted behaviors.	DEI
	<b>Action #3:</b> Integrate trainings, such as “Managing Unwanted or Unwelcome Behavior in the Gray Zone,” into existing programming and processes.	DEI*; People & Culture
	<b>Action #4:</b> Continue to implement the due diligence process and research.	Prospect Development and Analytics
<b>Metric #3:</b> 100% of staff have required space to work based on their work arrangement in a hybrid workplace.	<b>Action #1:</b> Recommend a strategy to determine how office space is allocated and used based on the planned staff work arrangements.	Finance and Administration*; Space Committee
	<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,	<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	DEI

helping us understand the relationship between individual competence and organizational support.	teams' DEI priorities and how they will implement DEI.	
	<b>Action #2:</b> Develop and acquire tailored change management processes and resources to support OUD-wide and team implementation of DEI in their core work.	DEI; Organizational Strategy

Strategic Objective #3: Advance pay equity in compensation across OUD.		Key Constituency: Staff
Associated Metrics	Detailed Actions Plan (measurable, specific)	Groups Accountable <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 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.	Finance and 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 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> Identify a baseline.	Compensation Working Group
	<b>Action #3:</b> Collaborate with internal communications leaders to design a communications strategy that leads to more	Compensation Working Group

	transparency and awareness of compensation practices.	
<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)

Strategic Objective #1: In support of OUD's mission, increase the diversity of the donor base, volunteer base, and campaign and leadership councils.		Key Constituency: Donors
Associated Metrics	Detailed Actions Plan (measurable, specific)	Groups Accountable <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.	Prospect Development and Analytics*; all fundraising teams
	<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.	University and Development Events
	<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.	Stewardship and Donor Relations
	<b>Action #4:</b> 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.	Stewardship and Donor Relations
<b>Metric #2:</b> Engage donors in an equitable way, with specific attention to addressing any disparities related to donor race and gender.	<b>Action #1:</b> Develop and execute a change management plan around entering plan and visit data into DART, U-M's donor database.	Prospect Development and Analytics; Integrated Data Services
	<b>Action #2:</b> Enter race and pronoun data collected via varying survey instruments.	Prospect Development and Analytics; Integrated

	Make sure that there are appropriate protocols around data usage before entering.	Data Services
	<b>Action #3:</b> Develop reporting and tools to support new measures of portfolio engagement (year one and year two).	Prospect Development and Analytics; Integrated Data Services
	<b>Action #4:</b> Integrate pronouns into user/profile, survey forms, or other OUS tools.	Digital Infrastructure
<b>Metric #3:</b> 100% of OUD frontline fundraisers will conduct introductory 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 “introductory” 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>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 across the development community to provide salient information about match and partnering opportunities.	DEI
	<b>Action #3:</b> Implement Giving Blueday 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	<b>Action #1:</b> Work with ODEI to collect	DEI



and giving to DEI fundraising priorities across all three campuses and Michigan Medicine.	priorities submitted through the DEI 2.0 strategic planning process.	
	<b>Action #2:</b> Increase the number of impact reports and stewardship moves for collaborative initiatives with a DEI focus, specifically: produce Wolverine Pathways impact report, Undergraduate Laptop Program impact report, and reports on Go Blue Guarantee and/or HAIL programs.	Stewardship and Donor 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> Investigate the ability to use	Corporate and

	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.	Foundation Relations
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Strategic Objective #3: Create and modify infrastructure, outreach, and processes to fundraise for DEI priorities and broadly diversify Michigan's donor base.		Key Constituency: Donors
Associated Metrics	Detailed Actions Plan (measurable,specific)	Groups Accountable <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; Prospect Development and Analytics
	<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 change management strategy and develop communications strategy to increase development staff use of the Stewardship Special Communications Form in order to	Stewardship and Donor Relations

	create transparency and equitable access for the U-M development community in requesting special donor communications from the President and/or Vice President for Development. This modification in infrastructure will allow development staff across U-M to strengthen relationships between university leadership with U-M's globally 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 and socialize 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

## Plans for Supporting, Tracking, and Updating the Strategic Plan

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 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 collaboration with OUD DEI, Organizational Strategy conducts the annual planning process every spring in which OUD leadership and teams determine OUD-wide goals and strategies for the upcoming fiscal year. In 2023, the annual planning process was modified to integrate DEI into unit-wide and team-wide goal-setting. In FY24 and going forward, every quarter, Organizational Strategy will collect updates on OUD's priorities, including the DEI strategic objectives, metrics, and actions outlined in this plan.

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 a thorough update on our yearly progress.