

# 2004-09 Framework to Foster Diversity Final Report

## Table of Contents

### Narrative

Executive Summary	2
Challenge 1 Developing a Shared and Inclusive Understanding of Diversity	3
Challenge 2 Creating a Welcoming Campus Climate	4
Challenge 3 Recruiting and Retaining a Diverse Student Body	4
Challenge 4 Recruiting and Retaining a Diverse Workforce	5
Challenge 6 Diversifying University Leadership and Management*	7
Challenge 7 Coordinating Organizational Change to Support Diversity	7
Membership of Diversity Committee	9

*\* Challenge 5 (Developing a Curriculum that Supports the Goals of our New General Education Plan) will not be addressed in this report as it falls outside the mission of this Division.*

## **Executive Summary**

The following document (including narrative and an accountability grid) represents a summary of actions taken by the Division of Development and Alumni Relations to meet six (of seven) challenges set by the University to advance diversity throughout its programs, services, and people. The document summarizes both the progress made toward fulfilling the diversity goals, objectives, and strategies outlined in the 2004-2009 Framework to Foster Diversity at Penn State; and additional activity and progress made to advance diversity throughout the Division over the past five years.

The Division of Development and Alumni Relations is enthusiastic about the potential we have—through appreciating and fostering diversity—to create new approaches, generate deeper intellectual capital, improve communication, establish cross-cultural understanding, attract new members, develop resources, and much more. Through the support given by the Senior Vice President of Development and Alumni Relations and the Executive Director of the Penn State Alumni Association, the DDAR Diversity Committee has made significant advances in understanding and knowing our constituency and responding to their needs in regards to diversity.

The DDAR Diversity Committee seeks new members annually, and new members either nominate themselves or are nominated by a colleague. This gives individuals the opportunity to be involved on a committee with views and goals similar to their own. All nominees have different interests and perspectives in regards to diversity, making the committee diverse in its own right. Great strides have also been made to build a membership that more accurately represents the diversity of the Division: i.e. DDAR employees from the Commonwealth Campuses are strongly encouraged to seek membership on the Committee; and the number of Alumni Association versus Development staff is reflective of both constituencies in the Division.

The DDAR Diversity Committee is comprised of three groups. Each group takes on the responsibility of implementing specific initiatives, and the leadership of both the Division and Committee allows for significant flexibility and creativity in working toward the challenges and initiatives in the current Framework. The committee recognizes that diversity-related initiatives are taking place across the Division and encourages regular communication between the committee and Division staff to ensure awareness of these efforts.

The initial goals established for the 2004-2009 Framework to Foster Diversity were idealistic; however, the Division's leadership recognizes the need for a flexible plan that will continually adjust to new ideas as they are presented. Below is a summary of our Division's work towards meeting the challenges through our goals and initiatives. Attached is an accountability grid with initiatives listed under each challenge illustrating our Division's progress to date within the 2004-09 Framework to Foster Diversity.

## **Challenge 1: Developing a Shared and Inclusive Understanding of Diversity**

During the 2004-2009 Framework to Foster Diversity, the Division of Development and Alumni Relations sustained an aggressive array of diversity programs that reached staff in our Division. The DDAR Diversity Committee was responsible for generating most of the programs and organizing the diversity events for the division. In our Division's diversity related meetings, it is regularly noted that diversity goes well beyond our visible differences, and the DDAR Diversity Committee has identified topics for presentations and discussions which encompass a broad spectrum of diversity issues including, but not limited to: domestic violence; low-income, first generation students; access for people with physical disabilities; migrant farm-worker issues; race and culture; and the LGBT community. These topics were addressed in forums such as the DDAR Division Quarterly Meeting, monthly Brown Bag Lunch programs, and our Summer Diversity Film Series which began in 2008. (Please see the accountability grid for a full listing of program topics.) Guest presenters and speakers have included faculty members from across the Penn State University Park community, representatives from the Women's Resource Center, Dr. Terrell Jones, Vice Provost for Educational Equity, and Ken Lehrman, Vice Provost for Affirmative Action.

Through the results of a climate survey conducted for the Division in 2007 and the Faculty/Staff Survey conducted in 2008, we have a better understanding of the diversity related issues our employees face (See Appendix I). An overwhelming 80% of Division employees filled out the survey, giving an accurate representation of issues that need to be addressed by both the Diversity Committee and the Division's leadership team. Results showed that DDAR is a community whose members are generally satisfied with the work environment. However, although personal experiences of harassment are uncommon in DDAR, ones that occur are most often based on job status. In addition, the division is challenged by a lack of minority representation. Of the 307 members of the DDAR community, only 13 (or 4.2%) are people of color. DDAR staff had the opportunity to review and discuss the results of the survey via a presentation at the Division Quarterly Meeting, and the complete survey results are available on our internal website, LaunchPad. The DDAR Diversity Committee has ongoing communication about the climate survey with the Division's leadership team including Rod Kirsch, Roger Williams, Dave Lieb, and Shaun Keister.

Throughout the Division of Development and Alumni Relations, efforts have been made to target our alumni from underrepresented constituent groups through scholarship appeals and alumni awards. Efforts include reaching out to: Veterans; Lawrence Youth Scholarship donors, Bunton Waller Fellows and Scholars alumni. The Division is making concerted strides toward our Hispanic, Asian and Asian-American, and Native American alumni.

Participation by employees, alumni and donors in our Division's programs is a testament to the success of our efforts to help educate others about the many facets of diversity. We continue to operate with the understanding that you never know how anyone is affected by diversity issues just by looking at them.

## **Challenge 2: Creating a Welcoming Campus Climate**

Throughout a variety of activities and projects, the Division reaches out to our employees, alumni and friends, creating and sustaining opportunities for our different constituencies to feel comfortable and welcome as part of the Penn State family. From our Lion Ambassadors highlighting various diversity-focused talking points, to Division representation on the President's Commissions including Commission for Women, Commission on LGBTE, and CORED, to Educational Equity's development efforts to solicit diversity alumni, our Division actively pursues many inclusive programs and projects. Some highlights of these many ongoing efforts include: Alumni Council's Diversity Committee holding periodic meetings with President Spanier, staff, administrators and students to discuss and support initiatives that enhance diversity at the University; reaching our underrepresented alumni through Penn State Today; DDAR Diversity Committee Chair meeting annually with diversity committee chairs from across the University to seek to implement best practices; the Division's sponsorships of campus activities such as Dr. Martin Luther King, Jr. Day events, Commission for Women banquet, and inviting distinguished speakers from diverse groups to speak at "Huddle with the Faculty" and "City Lights" events.

The Division's participation in all of the above mentioned activities, as well as other initiatives toward the goals in Challenge 2, demonstrates our commitment to respect for an individual's difference and the value we place on diversity, while promoting a culture of acceptance and respect.

## **Challenge 3: Recruiting and Retaining a Diverse Student Body**

Minority enrollment at Penn State is at an all time high with 12,385 students or 13.4 percent of the student body. Scholarship support, program assistance, and volunteer involvement are three key ways that the Division can contribute to the University's overall success in recruiting and retaining a diverse student body.

Other division accomplishments include:

- with funding from the Office of Educational Equity a full-time development position was created which is responsible for fundraising efforts to support scholarships for underrepresented student groups and programs that promote diversity within the University system.
- securing \$63 million in gifts and pledges for the Trustee Scholarship Program, including a \$1.75 million commitment from the Penn State Alumni Association in 2008 to establish 35 Trustee Scholarships across the University.
- creating the African American Alumni Organization Trustee Scholarship, which gives first preference to students "...whose ethnic, cultural or national background contribute to the diversity of the student body and who have a demonstrated financial need."

- exceeding the goal of raising \$475,000 per year from companies and foundations for diversity initiatives, raising a total of \$5,632,836 during this reporting period.
- matching more than 170 first-year ethnically underrepresented students with faculty or staff mentors and connecting the first-year student to the alumni through the FastStart Mentoring Program. The program has also been established at Penn State Altoona and Penn State Behrend, with support coming from University Park.
- coordinating mail and e-mail solicitations for former Bunton-Waller scholars and fellows, which generated 16 gifts totaling \$955 in 2009.

#### **Challenge 4: Recruiting and Retaining a Diverse Workforce**

It is important to note that all of the data offered in Challenge 4 regarding the diversity of the Division of Development and Alumni Relations workforce relates only to women and ethnic minorities. At present, the Office of Affirmative Action does not offer data that captures the myriad individual differences covered in the Division’s definition of diversity (race, ethnicity, national origin, gender, sexual orientation, socio-economic status, age, life circumstances, physical abilities, religious beliefs, political beliefs, or other ideologies).

In 2004, the Division of Development and Alumni Relations reported that 94.7 percent of our staff members self identified as white. As of 2009, 95.6 percent of our staff members self identified as white (or 4.4 percent of our staff self-identify as ethnic minorities). While the division has decreased since 2004 in terms of minority representation, the division rebounded back from 4.1 percent in 2007 to 4.4 percent in 2009, an increase of .3 percent. Additionally, representation of other groups in leadership positions has increased from 3.6 percent in 2007 (includes Grade 26 and above and Competency levels 4 and 5) to 4.9% percent in 2009, an increase of 1.3 percentage points.

#### ***Percentage of Minorities in Division Positions by Grade***

Grade	2004	2007	2009
19 and below	6 of 126 positions (4.7 %)	1 of 91 positions (1 %)	2 of 34 positions (5.8 %)
20 – 25	6 of 97 positions (6.1 %)	4 of 48 positions (8.3 %)	4 of 55 positions (7.2 %)
26 and above	3 of 55 positions (5.4 %)	3 of 23 positions (13.0 %)	2 of 25 positions (8.0 %)
Competency	N/A	5 of 150 positions (4.3 %)	7 of 230 positions (3.0 %)
Total	15 of 278 positions (5.3%)	13 of 312 positions (4.1 %)	15 of 344 positions (4.4 %)

Recruiting minorities to the field of institutional advancement has been a challenge for the Division. According to CASE, the Council for the Advancement and Support of Education, the level of diversity within advancement has changed little within the past decade. In a national survey of advancement professionals conducted in 2002, CASE revealed that approximately 5.8 percent of full-time advancement officers identify themselves as racial or ethnic minorities—little change since 1996, when the figure was 5.6 percent. While Penn State is slightly below with this national average, we aspire to achieve more.

Women, while often defined as an underrepresented group, are amply represented in the Division. In fact women make up about 73.8 percent of all positions within the Division, a percentage that has been consistent since 2004. Their representation in leadership positions has continued to be strong. They now hold approximately 53 percent of all leadership positions within the Division (Grades 26 and above and Competency levels 4 and 5).

***Percentage of Women in Division Positions by Grade***

Grade	2004	2007	2009
19 and below	121 of 128 positions (94.5 %)	89 of 91 positions (97.8 %)	33 of 34 positions (97 %)
20 – 25	62 of 97 positions (63.9 %)	39 of 48 positions (81.2 %)	45 of 55 positions (81.8 %)
26 and above	30 of 53 positions (56.6 %)	14 of 23 positions (60.8 %)	14 of 25 positions (56.0 %)
Competency	N/A	90 of 150 positions (60 %)	162 of 230 positions (70.4 %)
Total	213 of 278 positions (76.6 %)	232 of 312 positions (74.3 %)	254 of 344 positions (73.8 %)

Employee retention is also critical to the Division. Staff retention within the Division is about par with the University’s retention rates. According to OHR statistics:

	<u>University</u>	<u>DDAR</u>
Retention FY 04-05	94.8%	87.7%*
Retention FY 06-07	92.7%	91.4%
Retention FY 07-08	93.1%	90.2%

*\* A noticeable decrease in Division retention FY 04-05 can be attributed to the end of the Grand Destiny Campaign in 2003. It is common within the field of advancement for high-level development officers to move on after they have met their goals during a large capital campaign such as this.*

*\*\*All retention rates are based on October to September timeframe. 2009 retention rate is not yet available.*

Research has indicated that one of the single most important determinant of individual performance is a person's relationship with his or her immediate manager. Without a robust relationship with a manager who sets clear expectations, knows the staff, trusts the staff, and invests in the staff, staff members are less likely to stay and perform. The Division will continue to treat retention as an ongoing priority that enables managers to focus on proactive measures to sustain long-term employment commitments, rather than reactive attempts to reverse surprise resignations.

### **Challenge 6: Diversifying University Leadership and Management**

*“Diversity efforts . . . which are driven from the top down are more likely to be able to overcome any resistance employees might have to including those perceived as different.”*

—Society for Human Resource Management

Leaders within the Division of Development and Alumni Relations recognize the importance of diversity to our division and the University as a whole. Division Leadership has worked to diversify the volunteer leadership within the Alumni Association and the Office of University Development, enhance the Division's understanding of diversity through mandatory trainings, and create University-wide scholarship programs that seek to strengthen the University's diversity through need-based scholarships, first-generation scholarships, and enrichment scholarships.

The Division recognizes that one of the most visible signs of our commitment to diversity is in those we choose as our leaders. Not only does diverse management reflect the society we serve, but leaders with diverse backgrounds ask different questions and allow us to take advantage of a broader range of perspectives.

Specific achievements in this area include the following:

- Increased diversity of volunteers serving on campaign committees both in terms of sex and ethnicity;
- Alumni Council, the PSAA's governing body, now exceeds the student body in terms of minority representation;
- Questions specific to the support of diversity are now included on the 67 Sample Behavioral-Based Questions for Competencies of the New Hire Power;
- Recommendations have been forwarded to CORED in regards to including diversity issues in reference checks; and
- The senior management of the Division is more diverse than it has been in the past decade.

### **Challenge 7: Coordinating Organizational Change to Support Diversity Goals**

The Division of Development and Alumni Relations believes diversity is an essential component in contemporary higher education and throughout our global society; our structure and

organization must reflect this value. Further, we believe that efforts to improve the climate for diversity and ensure representation must be supported by systematic changes.

Coordinating organizational change to support diversity goals requires leadership. In order to bring about change, leadership in the Division must develop an awareness of inequities, interpret the meaning of these inequities, and move the Division to remedy them.

Our first step was to create a standing Diversity Committee for the Division of Development and Alumni Relations. This committee meets monthly and is tasked with moving the Division forward in myriad ways that enhance our diversity (affirmative action); our celebration of diversity (valuing differences); our management practices (managing diversity); and our numbers—both Alumni Association members attracted and dollars raised (leveraging diversity).

The success of this committee within the Division is due in large part to a clearly defined mission and objectives, and its focus on several key projects each year. By providing training opportunities, hosting brown bag lunches and the summer film series, writing articles for internal communications, and finding other avenues to promote diversity, the committee has promoted the importance of diversity at the University. One Division meeting is devoted exclusively to diversity programming annually.

The committee itself strives to represent the diversity of the Division – alumni and development; staff assistant to directors, and in 2009, the committee welcomed three members from campus locations outside of University Park to add yet another layer of diversity to the committee. Dissemination of diversity information to the Division has been increased not only through specific programming efforts, but through the use of technology. DDAR's Launchpad (the Division's internal website) now includes a specific section on diversity where items such as the framework and the climate survey may be found, and also includes periodic notices of programs and articles on diversity topics.

Finally, the Division continues to identify and engage underrepresented groups of students, friends and alumni, through both internal (see above) and external (Huddle with the Faculty, City Lights, Awards, etc.) programming, diversity based internships, special fields within the database, and alumni interest groups (based on age, ethnicity, gender, religion, etc.).

The Division's dedication to achieving diversity initiatives is apparent as we continue to commit to long-term fiscal investments (MLK Day of Service, Pow Wow, Diversity Internships, etc.), meaningful systems of accountability, and an efficient and collaborative infrastructure.

**Division of Development and Alumni Relations, 2008-2009 Diversity Committee Members:**

Chair, Liz King – Associate Director of Development, College of Arts & Architecture

Chas Brua – Contributing Editor, The Penn Stater Magazine

Jane Childs – Corporate and Foundation Analyst

Simon Corby – Director of Development, College of IST

Jordan Ford – Assistant Director, Annual Giving

Charlene Gaus – Regional Director, Volunteer Services, PSAA

Robin Guillard – Development Assistant, College of Engineering

Abigail Hopkins – Assistant Director of Stewardship, College of Ag Sciences

Jayson Jackson – Associate Director of Online Communications, PSAA

Karen McCulley – Development Assistant, Libraries

Teresa McGowan – Coordinator, Student Alumni Programs (FastStart)

Megan Miller – Production Manager, PSAA Membership

Jason Ramesar – Assistant Director, Alumni Relations, Eberly College of Science

Christine Spearly – Staff Assistant, Recruitment

Mary Jane Stout – Program Planner, Alumni Travel and Education

Lisa Temple – Human Resources Manager

Ed Thompson – Director of Development, Educational Equity

## **Appendix I: Engagement Improvement Map – DDAR 2008 University-wide Faculty/Staff Survey**

This map represents the Division of Development and Alumni Relations results from the 2008 University wide Faculty/Staff Survey. Individual survey items are mapped here, providing more specific information about favorable rated items and potential areas for improvement.

The top right quadrant notates Primary Maintenance Issues which means these items are most important to our workforce. Although the last two bullets on the grid (opinions count and administration values suggestions and ideas) received a positive rating, they are very close to the middle line meaning these are items to watch and are close to being primary improvement issues.

The improvement items are located on the bottom half of the graph. The bottom right quadrant are the items that are most important to staff but received an unfavorable rating. Most of the improvement items relate to respect and communication. The last three bullets on the grid (staff/admin share mutual respect; support/collegial with good morale and emotionally healthy workplace) all received an unfavorable rating but they were close to the middle line meaning. There is a need for improvement but we are moving in the right direction.

