

**Division of Development and Alumni Relations:
Framework to Foster Diversity—Midterm Report 2004 - 09
December 15, 2006**

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** 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 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 Strategic Plan Update; and additional activity and progress made to advance diversity in the Division.

Establishing a specific focus for diversity efforts is a critical step toward building a University that is well positioned for leadership in the new millennium. 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.

The goals and objectives that are outlined in this framework are ambitious and they are specific. They are organized in a manner that establishes clear lines of accountability, straightforward methods for measuring progress, and lucid expectations regarding regular communication about our progress to the Division and University. In order to make the process manageable the Division of Development and Alumni Relations has made several improvements to its Diversity Committee.

Recently, the Diversity Committee altered its recruitment process. Members are now nominated by a committee member or may nominate themselves. All committee members are still appointed by the Senior Vice President for Development and Alumni Relations. However, consideration is given first to employees who have an interest in diversity issues. Also, our approach to managing the work load generated by the Division's initiatives has changed. The Diversity Committee is comprised of three groups. Each group takes on the responsibility of implementing specific initiatives.

Enough data has been collected to formulate initial goals; however, the Division's leadership also 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 new framework. Attached is an accountability grid with initiatives listed under each challenge illustrating our Divisions mid-term progress to date.

Challenge 1: Developing a Shared and Inclusive Understanding of Diversity

A shared definition of diversity enables the Division to set clear objectives and measures of accountability for moving toward inclusiveness. The Division of Development and Alumni Relations supports the following definition of diversity:

Our Division defines the concept of diversity as one that encompasses acceptance and respect. It means recognizing and understanding individual differences. These differences can include race, ethnicity, national origin, gender, sexual orientation, socio-economic status, age, life circumstances, physical abilities, religious beliefs, political beliefs, or other ideologies. Diversity is the exploration of these differences in a safe, positive, and nurturing environment. It is about understanding each other and moving beyond simple tolerance to embracing and celebrating the rich dimensions of diversity contained within each individual.

Plans for disseminating this definition to internal constituents are outlined in Challenge 1: Goal 1. Plans for disseminating information about our diversity goals to external constituents are outlined in Challenge 1: Goal 2. Communication with external audiences is a critical step toward diversifying our volunteer leadership, enhancing support for diversity initiatives, and involving more diverse constituents in advancement.

Challenge 2: Creating a Welcoming Campus Climate

The Division strives to enhance the climate in which people work, learn, live, and interact. Creating and maintaining a welcoming environment demonstrates respect for an individual's differences, affirms the value of diversity, and promotes a culture of acceptance and respect.

Our focus has been:

- To implement strategies that will enhance the experience of underrepresented groups and increase their involvement with the University. (Affirmative Action)
- To develop events that highlight the University's diversity. (Valuing Differences)
- To share best practices and diversity resources with managers, staff, and volunteers—practices that support civility and respect while creating a welcoming environment. (Managing Diversity)
- To provide financial support for programs that engage diverse constituents including faculty, staff, and students in support of the University's mission and the Division's strategic plan. (Leveraging Diversity)

Challenge 3: Recruiting and Retaining a Diverse Student Body

Minority enrollment at Penn State is at an all time high with 10,905 students or 13 percent of the student body. This is an all-time high for the University and an 11 percent increase from last year (2005). 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.

Our focus has been:

- to build scholarship and program endowments that work to enhance the racial, cultural, and socio-economic diversity of the University;
- to help sustain a welcoming and accepting campus climate by supporting diversity initiatives on campus and within our offices;
- to recruit and support diverse student groups by strengthening connections to the Division's extensive volunteer networks; and
- to support the full range of student diversity including gender, race/ethnicity, sexual orientation, socio-economic status, age, life circumstances, physical abilities, religious beliefs, political beliefs, and other ideologies.

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).

As of Fall 2006, 5.3 percent of our staff self-identify as ethnic minorities. While the division has stayed relatively stable in terms of minority representation, representation of other groups in leadership positions has increased from 5.5 percent to 6.1 percent, an increase of .60 percentage points over the same time period.

Percentage of Minorities in Division Positions by Grade

Grade	2004	2005	2006
19 and below	6 of 126 positions (4.8 %)	3 of 109 positions (2.8 %)	3 of 116 positions (2.6 %)
20 – 25	6 of 97 positions (6.2 %)	9 of 102 positions (8.8 %)	8 of 111 positions (7.2 %)
26 and above	3 of 55 positions (5.5 %)	3 of 52 positions (5.8 %)	3 of 49 positions (6.1 %)
Competency	N/A	1 of 23 positions (4.3 %)	2 of 26 positions (7.7 %)
Total	15 of 278 positions (5.4%)	16 of 286 positions (5.6 %)	16 of 302 positions (5.3 %)

Women, while often defined as an underrepresented group, are amply represented in the Division. In fact women make up about 75 percent of all positions within the Division.

Their representation in leadership positions within the Division has grown substantially over the past several years. They now hold approximately 57 percent of all leadership positions within the Division (Grades 26 and above).

Percentage of Women in Division Positions by Grade

Grade	2004	2005	2006
19 and below	121 of 128 positions (94.5 %)	106 of 109 positions (97.2 %)	111 of 116 positions (95.7 %)
20 – 25	62 of 97 positions (63.9 %)	72 of 102 positions (70.6 %)	76 of 111 positions (68.5 %)
26 and above	30 of 53 positions (56.6 %)	27 of 52 positions (51.9 %)	28 of 49 positions (57.1 %)
Competency	N/A	10 of 23 positions (43.5 %)	13 of 26 positions (50%)
Total	213 of 278 positions (76.6 %)	215 of 286 positions (75.2 %)	228 of 302 positions (75.5 %)

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:

	University	DDAR
Retention FY 04-05	94.8%	87.7%*
Retention FY 05-06	94.4%	93.3%

** A noticeable decrease in Division retention over the past fiscal year can be attributed to the end of the Grand Destiny Campaign. 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.*

Challenge 6: Diversifying University Leadership and Management

*“Plainly, the way to attract and retain talent,
whether mainstream or minority,
is to demonstrate that the way to the top is open.”*

—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. The Penn State Alumni Association Executive Director, Roger Williams, in his Autumn 2003 Vision Statement for the Penn State Alumni Association, says:

First, The Penn State Alumni Association must strive for greater diversity in the broadest sense—age, gender, ethnic and racial background, geographic, sexual orientation, physical disabilities, and so forth—in our membership efforts and in our programs. In this inclusive spirit, the sense of “family,” “belonging,” and “unity” must be made more explicit,

particularly as it regards alumni and groups of diverse backgrounds who need and deserve fuller representation. Greater diversity will generate a broader range of involvement from our alumni as we seek to strengthen the University.

Division Leadership has worked to diversify the volunteer leadership within 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.

To meet our goals, we will revise our interview formats to include specific questions relevant to meeting current diversity initiatives. Careful consideration of the applicant responses will be a component of the decision-making process. Hiring managers and administrators will be charged with integrating the responses with the other areas of strength or weakness of each candidate. Should specific diversity concerns be perceived as a particular weakness in an otherwise strong candidate, the Vice President will be consulted.

Our focus has been:

- to implement a results-oriented plan for recruiting and retaining diverse administrators, leaders/volunteers, and donors; and
- to require demonstrated skills in managing diversity as a standard qualification for all leadership positions.

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).

This committee has been successful in increasing awareness of diversity in the Division. By providing training opportunities, hosting brown bag lunches, writing articles for internal communication, and finding other avenues to promote diversity, the committee has promoted the importance of diversity at the University. In each of the past two years, the entirety of one Division meeting where all employees come together, has been devoted exclusively to diversity programming.

The Division's dedication to achieving diversity initiatives is apparent as we continue to commit to long-term fiscal investments, meaningful systems of accountability, and an efficient and collaborative infrastructure.

Division of Development and Alumni Relations, Diversity Committee Members:

Chair, Teresa Hilgren, Coordinator, Student Alumni Programs

Chas Brua – Contributing Editor, The Penn Stater Magazine

Tamekka Davis – Assistant Director, Senior Research Analyst

Sue Anne Graham – Director of Development, University Libraries

Robin Guillard – Development Associate

Jayson Jackson – Web Production Coordinator / web Developer

Elizabeth King – Assistant Director of Development, College of Arts & Architecture

Kimberly Leynes – Sr. Research Coordinator

Megan Miller – Membership Assistant, PSAA Membership

Becky Mills – Director, Corporate & Foundations Relations

Lauren Steinberg – Assistant Director of Development, Annual Giving

Mary Jane Stout – Program Planner, Alumni Travel and Education

Lisa Temple – Human Resources Manager

Ed Thompson – Associate Director of Development, Educational Equity

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Challenge 1

Goal	Initiative	Initiative	Update on Progress	Responsible	Contact	Years of
				Office	Person	Focus
1	A	The September 2004 Division Quarterly meeting will focus on the Framework to Foster Diversity 2004-2009 with information on our division's plan, feedback we received, and next steps. At this meeting, we will make a special point of highlighting the division's diversity statement so it is clearly communicated at all levels of the division.	Completed	Diversity Committee	Joyce Matthews	
	B	Responsible for disseminating the Division's diversity plan to all responsible parties along with a charge to develop timelines, steps, and regular assessments for achieving the assigned goals.	A hard copy of the entire plan was given to each Division Manager along with this accountability grid in Dec 2004. The plan is linked on the Launchpad for all others. The plan is discussed with new employees by the Senior Vice President at his orientation meeting.	Diversity Committee w/ Office of the VP for Development and Alumni Relations		
	C	Share the division's definition of diversity and diversity plan with new employees during orientation.	Initiative C, D, E, F should be included together as they are related to the topic of diversity training. Training will not be mandatory, however the expectation of 4 hours per year will remain as the minimum.	Office of the Vice President for Development and Alumni Relations	Tamekka Davis	
	D	Promote diversity to division staff via the Launchpad twelve times per year.	Ongoing. We are looking at publishing diversity training on the Launchpad as well as the ALUM list serve, as well as other diversity issues such as special holidays and how they are celebrated.	Development Communications, Alumni Communications	Ray Marsh Rod Kirsch April Scimio	2005-06
	E	Determine diversity training for DDAR employees - courses that must be taken by all current employees and all new employees during their first year of employment.	We are looking to hold several diversity related brown bag luncheons. Topics and speakers will be determined at a future time.	DDAR and OHR Reps.	Rod Kirsch Lisa Temple	
	F	Include non-traditional training opportunities such as cultural activities, attendance at rallies, etc. In Diversity Training updates that appear on the Launchpad. Include broad array of non-traditional training opportunities that go beyond gender and race-ethnicity to highlight national origin, sexual orientation, socio-economic status, age, life circumstances, physical abilities, religious beliefs, political beliefs or other ideologies.	Ongoing.	DDAR and OHR Reps.	Rod Kirsch Lisa Temple	2005-06
	G	Have a diversity presentation at two of the Quarterly Division meetings. Consider making one of these a forum involving diverse alumni such as the forum on Women and Philanthropy that was conducted with a panel of female donors and alumnae. Possibly include people like Tommy Hogan who is responsible for recruitment and retention at AT&T.	For the past two years senior management has devoted one entire quarterly meeting to diversity education.	DDAR, OHR Reps in conjunction w/ the Office of the VP of Development and Alumni Relations	Rod Kirsch Lisa Temple	2005-06
	H	Disseminate unit feedback results from University climate survey and use it as one barometer for planning future training programs.	Group one received Diversity Climate survey and studied it to determine future directions.	DDAR and OHR Reps.	Rod Kirsch Lisa Temple	2005-06
	I	Rapidly disseminate information about current diversity issues to staff members so they have the information they need to communicate with staff, volunteers, and alumni constituents by signing up all staff members for Diversity Newswire.	Ongoing.	Development and Alumni Communications w/Office of University Relations	Ray Marsh Steve MacCarthy	2005-06
	J	Continue and strengthen strategic partnerships with the Office of Student Aid by sharing data and reports regarding undergraduate student needs and financial demographics that will strengthen the case for support presented to donors.	This initiative has been completed and we will revisit every other year.	Office of University Development w/ Office of Student Aid	Kelly Snyder	

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Challenge 1						
Goal	Initiative	Initiative	Update on Progress	Responsible Office	Contact Person	Years of Focus
2	A	Distribute Diversity Newswire to all relevant volunteer groups.	Ongoing. We will broaden the volunteer groups to include Alumni Volunteer Council, NCPSP, and each development unit's campaign committee.	Development and Alumni Communications w/ University Relations	Ray Marsh Steve MacCarthy	
	B	Create mailings for underrepresented constituent groups, including informational pieces, cultivation pieces, and appeals.	Ongoing.	Annual Giving, Alumni Communications, and Alumni Membership w/ Office of Educational Equity	Kathy Kurtz Roger Williams Susan Beschler Ed Thompson	
	C	Disseminate proposals and talking points to promote Enrichment and Destiny Scholarships.	Ed Thompson has already completed this initiative.	Development & Alumni Communications w/the Office of Educational Equity	Ray Marsh Ed Thompson	
	D	Distribute information about diversity initiatives to alumni volunteers.	In past 2 years 15 stories appeared in Alumni Volunteer Unit. Avg 1 per issue.	Alumni Volunteer Services	Kevin Barron	
	E	Assemble system for regular dissemination of feedback to division employees from Lion Line, (reasons why people don't give or become members, diversity concerns, etc.) on a monthly (semester?) basis.	In past 2 years 15 stories appeared in Alumni Volunteer Update e-newsletter mailed monthly to affiliate group leaders.	Annual Giving	Kathy Kurtz	
	F	Regularly audit all communication pieces (brochures, newsletters, reports, magazines, advertisements) to ensure photos and illustrations of minorities equal or exceed general minority population of the University. Consider going beyond gender and race/ethnicity representation to highlight national origin, sexual orientation, socio-economic status, age, life circumstances, physical abilities, religious beliefs, political beliefs, or other ideologies.	Ongoing	Annual Giving, Development and Alumni Communications	Ray Marsh April Scimio Tina Hay	

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Challenge 2						
Goal	Initiative	Initiative	Update on Progress as of 6/05	Responsible Office	Contact Person	Years of Focus
1	A	Establish protocol to allow Cynthia Baldwin, an African American and current chair of the Board of Trustees, to acknowledge gifts from African American alumni and friends.	This initiative is in process. The letter was drafted at the beginning of April 2005. It was sent to President's Club Members in August.	Donor Services	Lori Baney	
	B	Critically evaluate the invitation lists, locations, foods, and entertainment for annual events and programs to make events welcoming for underrepresented groups (tailgates, reunions, etc.).	Ongoing.	Donor Relations & Alumni Events	Casey Goodall Deborah Marron	
	C	Develop targeted programs that welcome diverse constituents who have had little involvement with the University after graduation. Consider programming opportunities that provide a welcoming environment for all underrepresented groups including gender, race/ethnicity, national origin, sexual orientation, socio-economic status, age, life circumstances, physical disabilities, religious beliefs, political beliefs, or other ideologies.	Ongoing. Black Alumni Reunions are being held every other spring, the last was held spring 2006.	Donor Relations, Alumni Volunteer Services, and Alumni Program Development	Casey Goodall Kevin Barron Deborah Marron	
	D	Increase the diversity of invitees at University tailgates from less than 1% per tailgate to 5 % per tailgate.	Humphrey Fellows were invited each of the last two years.	Donor Relations	Casey Goodall	
	E	Send a letter from the chairs of the National Council on Penn State Philanthropy (NCPS) and the Alumni Council Committee to members of diverse alumni interest groups volunteer committees, and volunteer leaders to find out how the Division can create a more welcoming climate for underrepresented groups. The results will be shared with all staff. A second letter will be sent to the same audience thanking them for their participation and encouraging them to become involved in specific volunteer committees or groups that will be listed with this correspondence.	No action on initiative to date.	Alumni Volunteer Services w/ Ass. VP of DDAR and Exec. Dir. of PSAA	Kevin Barron Rod Kirsch Roger Williams Peter Weiler	
	F	Add diversity-focused talking points to the Lion Ambassador tour scripts. These talking points may highlight details regarding prominent Penn Staters who represent the full spectrum of the University's diversity and who have contributed positively to the	Ongoing and are looking to expand.	Asst. Dir. of Student Involvement at the PSAA w/ Dir. of Strategic Communications	Tara Wyckoff Kate Poorman	
	G	Continue to hold regular meetings between the Alumni Council Diversity Committee and President Spanier, staff, administrators, and students to discuss and support initiatives that enhance diversity at the University. Share ideas, activities, and best practices with all staff by posting information on Division's Intranet.	Tastes of Penn State event are held each fall and spring with Student leaders of diverse student organizations, administrators, and staff to meet with Alumni Council members to discuss ways to collaborate to enhance diversity events. Lion Ambassadors coordinated the event in fall 2006 and leadership training activities were added.	Alumni Volunteer Services and Program Development and Enrichment	Kevin Barron Deborah Marron	2005-06
	H	Conduct Division-wide focus groups to assess climate issues and concerns in collaboration with the Office of Educational Equity.	To discuss with Lisa Temple, Human Resource Manager DDAR.	DDAR and OHR Reps.	Rod Kirsch Lisa Temple	2005-06

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	I	Develop and implement an internal system for reporting and addressing climate issues. Ask more staff to join the "Penn State Support Network" and identify new Network members for all staff so they can serve as a resource to address climate concerns and provide information about the University's diversity resources and support programs.	Currently we have administrators and staff serving on all the Presidents Commissions: Commission for Women, Deborah Marron, Robin Guillard; Commission on Lesbian, Gay, Bisexual, Transgender Equity, William Toy; Commision on Racial/Ethnic Diversity, Dan Genard, Roger Williams and Teresa Hilgren	DDAR and OHR Reps.	Rod Kirsch Lisa Temple	
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Challenge 2

Goal	Initiative	Initiative	Update on Progress	Responsible	Contact	Years of
				Office	Person	Focus
2	A	Explore highlighting programs that reflect diverse University and campus groups at development and alumni events (i.e. McKeesport Gospel Choir).	Essence of Joy has performed at several DDAR events.	Office of the VP for Development and Alumni Relations	Rod Kirsch Casey Goodall Deborah Marron	
	B	Hold at least one Penn State Today weekend for underrepresented groups. Penn State Today is a program designed to strengthen relationships with high-giving capacity alumni and to motivate them to a higher level of giving. Participants of this program may later be solicited for a scholarship gift. Estimated cost: \$5,000-\$7,000	This is a carry over from last year's initiatives. No action taken yet.	Donor Relations	Casey Goodall	
3	A	Enhance formal training programs regarding topics that affect climate issues such as conflict resolution, small group dynamics, etc. And communicate these opportunities to Division managers and staff members.	No action taken to date.	DDAR and OHR Reps.	Rod Kirsch Lisa Temple	
	B	Seek best practices for diversity from the entire Division (campuses, colleges, and volunteers) and make available to all staff through LaunchPad.	No action taken to date.	DDAR and OHR Reps.	Rod Kirsch Lisa Temple	
4	A	Raise awareness among donors of support opportunities for diversity-related programs and other programs that enhance the campus climate. Consider marketing fundraising opportunities that will enhance quality of the Penn State experience for all of the University's diverse constituents.	No action taken to date.	Penn State Alumni Association Executive Director, Office of Development	Dave Lieb Kathy Kurtz Ray Marsh	2005-06
	B	Continue to sponsor and support campus activities that contribute to a diverse and inclusive campus climate such as MLK Day events, the Commission for Women banquet, the Miss Black Penn State pageant, diverse Distinguished Speakers, and other programs. Consider programming opportunities that go beyond gender and race/ethnicity to highlight national origin, sexual orientation, socio-economic status, age, life circumstances, physical abilities, religious beliefs, political beliefs, or other ideologies	Development and Alumni Association both sponsored tables at the MLK dinner. G. Genard and Cynthia Hamlin, chair of Alumni Council Diversity Committee met with Susan Lucas and Jen De Coste, co-chairs of LGBTE Commission to discuss increasing LGBT representation in awards. They extended invitation to Roger Williams and Lew Gold to welcome LGBT alums at Lavender Graduation in Spring 2006 and invited Cynthia to meet with Commission at upcoming monthly meeting (date TBD). In 2007 CORED will request a co-sponsorship with ACDC of a student issues program (TBD).	Penn State Alumni Association Executive Director, Office of Development	Roger Williams Peter Weiler Jean Songer Patrick Scholl	2005-06
	C	Solicit funds for Student Affairs programs and facilities that impact underrepresented students such as the MBNA Career Services Center, the Pasquerilla Spiritual Center, the Escort Services, and Late Night Penn State activities at the HUB.	Funding priorities for the new university campaign are being jointly identified with Student Affairs. 1 million plus donors.	Offices of Annual Giving and University Programs	Kathy Kurtz Ken Cutler	
	D	Solicit five to ten major gifts (\$50,000+) from diverse alumni by December 2009.	Two African American families are members of Laurel Circle and are recent donors	Office of the VP for Development and Alumni Relations	Rod Kirsch Peter Weiler Ed Thompson	

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Challenge 3						
Goal	Initiative	Initiative	Update on Progress	Responsible Office	Contact Person	Years of Focus
1	A	Consider funding a development position in partnership with the Office of Educational Equity to be responsible for fundraising efforts that support scholarships for underrepresented student groups and programs that promote diversity within the University system.	Completed	Office of University Development and Office of Educational Equity. Estimated Cost: \$10,000 - \$50,000	Peter Weiler	
	B	The Trustee Scholarship Program is a matching scholarship initiative that partners endowed funds established by Penn State supporters with general funds from the University to keep doors of opportunity open for everyone. University Development seeks to raise \$100 million for Trustee Scholarships and this matching opportunity is currently available until funds run out. Each development director is responsible for raising a portion of this goal. The Trustee Scholarship Program represents a concerted effort to raise funds to support a more socioeconomically diverse undergraduate student body.	To date \$35Million has been raised since 2002. This initiative will continue in new university campaign.	Office of University Development	Kelly Snyder	2005-06/ 2006-07
	C	Provide staff members with training and materials regarding diversity-related scholarship opportunities - the Destiny and Enrichment Scholarship Programs. Development can increase donor gifts to these programs by raising staff awareness and by providing development field officers with talking points and proposals.	Development Communications is working on case statements for Educational Equity and Undergraduate Scholarships, both of which will highlight importance of scholarships to promoting diversity. When complete, we can work on incorporating these into training materials.	Office of Development Communications	Ray Marsh Dave Lieb	2005-06/ 2006-07
	D	Annually solicit diverse alumni for gifts to the general Penn State Enrichment Scholarship. This appeal will raise additional funds for the scholarship and will also encourage annual giving from younger alumni of underrepresented groups. DDAR will work with the Office of Student Aid as they ensure that Enrichment Scholarships aid the University's commitment to provide all individuals—regardless of ethnicity, gender, or other personal characteristics—the opportunity to achieve their full potential and contribute to the University's academic vitality. Alumni that begin annual giving early in their careers tend to continue and increase giving throughout their lives.	A. G. and Ed Thompson developing mail appeal to Bunton-Waller alums (spring 07).	Office of Annual Giving and the Office of Student Aid	Kathy Kurtz Anna Griswold	2005-06/ 2006-07
	E	Encourage alumni chapters and interest groups to create new diversity scholarship funds.	No action taken to date.	Alumni Volunteer Services and Office of Annual Giving	Kevin Barron Kathy Kurtz	2005-06/ 2006-07
	F	Continue raising annual support for underrepresented students from companies and foundations interested in the education of minority students. The Office of Corporation and Foundation Relations has solicited and received funding in the amount of \$429,000 over the 2003-2004 fiscal year. This office will strive to increase annual support for diversity initiatives by 10 percent to approximately \$475,000 per year.	Effort is ongoing with \$710,000 raised is 2005-2006 fiscal year for diversity initiatives. These initiatives include ethnicity, gender, disability, religious, accessibility. To date, \$880,000 raised in current fiscal year.	Corporate and Foundation Relations	Becky Mills Jane Childs	2005-06/ 2006-07

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Challenge 3

Goal	Initiative	Initiative	Update on Progress as of 6/05	Responsible Office	Contact Person	Years of Focus
2	A	The FastStart program plans to maintain the current level of student participation in this model program. As of 12/03, 168 students (1 of every 5 first-year minority students) are involved—this represents growth of 40 percent over the previous year. Significant growth in student participation would require additional facilities and staff resources. However, FastStart will grow mentor participation to better partner mentors with student participants to a total of 225 faculty/staff mentors (from 181 in 12/03) and 300 alumni mentors (from 251 in 1/04) by 2009.	As of December 2006 there are: 250 active and 70 *inactive alumni mentors; 194 active and 84 *inactive faculty/staff mentors. (*Inactive mentors are mentors who have asked not to be matched for the current year, but to remain in the data base for future possible matches). We contact each mentor every year in the spring to ask their availability for the following academic year. We advertise by: Rod Kirsch sent an e-mail to all the Deans and V.P.s encouraging senior staff to participate as mentors; Penn State Magazine; Listserves; Newswires; and mentor assistance by passing along information to other PSU and alumni colleagues.	Fast Start Coordinator and Alumni Career Services	Teresa Hilgren Cheryl Bonner	2005-06
	B	Systematically encourage Alumni Interest Groups to become involved with related student interest groups. This is already happening in some areas, for example, the African American Alumni Interest Group in the Washington D.C. area and the Penn State Professional Women's Networks of New York and Washington, D.C. both hold regular networking/mentoring events for current students.		Office of Alumni Volunteer Services	Kevin Barron	2005-06
	C	Strategically market Fast Start, a mentoring program that pairs Penn State students from underrepresented groups with alumni.	Currently marketing FastStart through: the PennStater Magazine; the Alumni Association Website; Development staff; AAAO alumni interest groups; other alumni mentors; recently tabled an after-hours networking mixer for alumni at the Philadelphia Zoo. Alumni Career Services promotes FastStart at all Nittany Networking Events. Nittany Networking Events for 2006 have been held at Penn State Abington, Altoona, and Berks campuses. Nittany Networking Events were also held in partnership with alumni chapters and interest groups in DC, Philadelphia and Pittsburgh.	Alumni Career Services	Cheryl Bonner	2005-06
	D	Explore the possibility of conducting a baseline survey of admission volunteers to determine race, ethnicity, and gender. Consider whether additional recruitment initiatives are necessary to further diversify this group.	Our committee has decided this is not a good idea and it has been abandoned.	Office of Undergraduate Admissions in cooperation with the Alumni Association	Kevin Barron	

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Challenge 4

Goal	Initiative	Initiative	Update on Progress	Responsible	Contact	Years of
				Office	Person	Focus
1	A	Increase minority candidates in applicant vacancy pool. A) Use various strategies to increase awareness of job openings to strategic populations. B) Employ the expertise of the Office of Human Resources in helping to spread the word about specific job vacancies. C) Use the Association's own job posting service and other electronic media including internal lists and contacts.	Contact Association for Fundraising Professionals (AFP) to post development jobs when they are available and use other professional organizations as a way to get the word out; Use the internship program as a way to build awareness of the development profession to underserved populations amongst students.	DDAR, OHR Reps. and all hiring units	Rod Kirsch Lisa Temple	
	B	Educate managers about effective recruiting and hiring strategies. A) Educate managers about effective recruiting and hiring strategies. B) Contract with external diversity experts and consultants as appropriate to conduct workshops and training sessions on recruiting and retaining a diverse staff such as the Alumni Association management staff did on September 1, 2004 with Dr. Tyrone Holmes. C) Share magazine articles or post pertinent articles on the Launch Pad. Responsible Office: Development & Alumni Communications.	Training for Development Managers in Fall 2005. Division wide Manager Training on June 6, 2006. Ken Lehrman presented two hour seminar on Affirmative Action and hiring processes in Fall 2006.	DDAR, OHR Reps w/ Office of Affirmative Action which will offer courses for the Division on an Ad Hoc basis as requested	Rod Kirsch Lisa Temple	2005-06
	C	Encourage search committees to be as diverse as possible (race, ethnicity, national origin, gender, sexual orientation, socio-economic status, age, life circumstances, physical abilities, religious beliefs, political beliefs, or other ideologies).	Currently evaluating interview and reference check forms to make recommendations and forward to CORED.	DDAR, OHR Reps(monitoring); Executive Directors of Development and the PSAA (implementation)	Rod Kirsch Lisa Temple Peter Weiler Roger Williams	2005-06
	D	Communicate the importance of diversity (race, ethnicity, national origin, gender, sexual orientation, socio-economic status, age, life circumstances, physical abilities, religious beliefs, political beliefs, or other ideologies) to hiring managers.	Currently evaluating interview and reference check forms to make recommendations and forward to CORED. Met with Keith Reese, Lisa Temple, Steve Hayes, and Julie Hartley. Steve's department is aggressively working on attracting and retaining minority candidates to the University. One way they do this is to provide all new minority employees with a packet containing important area information. "Mastering Supervision" now includes training on search committees.	DDAR, OHR Reps(monitoring); Executive Directors of Development and the PSAA (implementation)	Rod Kirsch Lisa Temple Peter Weiler Roger Williams	2005-06
	E	Evaluate managers on diverse (race, ethnicity, national origin, gender, sexual orientation, socio-economic status, age, life circumstances, physical abilities, religious beliefs, political beliefs, or other ideologies) make-up of new hires.	No action taken to date.	DDAR, OHR Reps(monitoring); Executive Directors of Development and the PSAA (implementation)	Rod Kirsch Lisa Temple Peter Weiler Roger Williams	

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	F	Encourage managers to interview at least one minority candidate.	A process has been put in place to ensure that qualified minority applicants are interviewed. After a position is posted, each manager is encouraged to furnish HR with a short list of applicants they wish to interview. HR will determine if there are any diverse candidates on the short list and can refer qualified candidates to the interviewing pool to add diversity.	DDAR, OHR Reps(monitoring); Executive Directors of Development and the PSAA (implementation)	Rod Kirsch Lisa Temple Peter Weiler Roger Williams	2005-06
	G	Analyze, communicate, and employ results of Best Practices Survey conducted by OHR (in cooperation with the Office of Affirmative Action) and the Alumni Association.	Group #1 is reviewing results and working with Sue Rankin to develop a climate assesment tool for Division [2/3/2006 GG]	DDAR, OHR Reps(monitoring); Executive Directors of Development and the PSAA (implementation)	Rod Kirsch Lisa Temple Peter Weiler Roger Williams	2005-06
	H	Cultivate potential staff members from student and staff pools, paying special attention to strategic populations (race, ethnicity, national origin, gender, sexual orientation, socio-economic status, age, life circumstances, physical abilities, religious beliefs, political beliefs, or other ideologies).	Development worked with Office of Disabilities Services to hire staff [2/3/2006 GG]; Establish DDAR internship and continue program annually.	DDAR, OHR Reps(monitoring); Executive Directors of Development and the PSAA (implementation)	Rod Kirsch Lisa Temple Peter Weiler Roger Williams	2006-07

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Challenge 4

Goal	Initiative	Initiative	Update on Progress	Responsible	Contact	Years of
				Office	Person	Focus
1	I	Explore the feasibility of advertising Executive, Administrative, and Managerial positions to broader audiences to attract candidates from national advancement pool (Pittsburgh, Philadelphia, and New York newspapers; Chronicles of Philanthropy or Higher Education).	On-going efforts to advertise in appropriate media and working with OHR on recruiting efforts.	Executive Directors of University Development and the Penn State Alumni Association	Dave Lieb Roger Williams	
	J	Offer internship and work-study opportunities to underrepresented students (race, ethnicity, national origin, gender, sexual orientation, socio-economic status, age, life circumstances, physical abilities, religious beliefs, political beliefs, or other ideologies).	Rod Kirsch has agreed to provide matching funds for two paid internships annually. Also, staff will be encouraged to consult the Multicultural Internship Program (MIP) when advertising positions. Internship program will be launched in the 06-07 year.	Associate VP for DDAR; Exec. Dir. of Development; Exec. Dir. Of PSAA	Peter Weiler Dave Lieb Roger Williams	2006-07
	K	Develop leadership programs to introduce students, particularly Lion Ambassadors and Blue & White Society members, into the advancement profession, especially targeting diverse (race, ethnicity, national origin, gender, sexual orientation, socio-economic status, age, life circumstances, physical abilities, religious beliefs, political beliefs, or other ideologies) students.	No action taken to date.	DDAR and OHR Reps.	Rod Kirsch Lisa Temple	2005-06
	L	Reinstitute Division involvement with the Administrative Fellow Program. Have at least three fellows over the next five years.	Rod Kirsch got an Administrative Fellow in the 2006-07 fiscal year. Joyce Matthews shared Administrative Fellows program info with Division staff; and she has posted DDAR job openings in Fellows listserv. Article posted in Launchpad.	VP of DDAR	Rod Kirsch	2005-06
2	A	Educate managers to become aware and hold them accountable for their role in their unit's attrition rate. A) Annually measure retention rates in individual units (on September 30 of each year). B) Use measure as a basis for conversation in annual performance review. C) Consider process of evaluating managers using peer and direct report input. D) Encourage staff to participate in existing mentorship programs. E) Benchmark with existing University programs to develop mentorship or other programs targeted specifically to women and m	No action taken to date.	DDAR, OHR Reps., PSAA Exec. Dir., Development Exec. Dir.	Rod Kirsch Lisa Temple Peter Weiler Roger Williams	2005-06

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	B	Refine current exit interview system to incorporate questions that address climate and ensure that all employees who are leaving the Division have an opportunity to participate.	Currently collecting current exit interview questions and reviewing/making recommendations. June 8, 2005: Joyce contacted Peter with a list of questions to add to exit interviews regarding work environment. Peter and Roger accepted the question updates and interviews all departing employees.	Assoc. VP of DDAR w/ DDAR, OHR Reps.(monitoring) and dept.heads within Development and PSAA (implementation)	Peter Weiler Rod Kirsch Lisa Temple	2005-06
	C	Analyze the results of the University-wide employee survey paying particular attention to organizational culture issues. Publicize results to staff and use as a springboard for discussion and planning among managers.	No action taken to date.	VP of DDAR	Rod Kirsch	2005-06

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Challenge 4

Goal	Initiative	Initiative	Update on Progress	Responsible	Contact	Years of
				Office	Person	Focus
3	A	Collect all employment data on September 30 of each year to coordinate with Affirmative Action data collection.	We no longer need to consider this as an initiative. We now get all the information from OHR.	DDAR, OHR Reps w/ Office of Affirmative Action	Rod Kirsch Lisa Temple	
	B	Collect all employment data from official database.	No action on initiative to date.	DDAR, OHR Reps w/ Office of Affirmative Action	Rod Kirsch Lisa Temple	
	C	Find a way to collect and disseminate applicant data for women and minorities in the same grade categories we measure presently to ensure that we are achieving adequate numbers of applicants from these groups.	No action taken to date.	DDAR, OHR Reps w/ Office of Affirmative Action	Rod Kirsch Lisa Temple	
	D	Find a way to collect and disseminate data regarding retention of women and minorities in the same grade categories we measure presently to ensure that we are adequately retaining these groups.	No action taken to date.	DDAR, OHR Reps w/ Office of Affirmative Action	Rod Kirsch Lisa Temple	
	E	Explore ways to capture data on the full range of diversity within the Division (race, ethnicity, national origin, gender, sexual orientation, socio-economic status, age, life circumstances, physical abilities, religious beliefs, political beliefs, or other ideologies).	Eligible information is available through OHR and the Affirmative Action Office.			

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Challenge 6

Goal	Initiative	Initiative	Update on Progress	Responsible	Contact	Years of
				Office	Person	Focus
1	A	During the Grand Destiny campaign, volunteers on campaign committees were 24.7 % female & .6 %minority. While volunteer committees for the period leading up to the University's next major campaign are still being formed, as of 1/04, volunteers are 28.7 percent female and 1.9 percent minority. Our goal: 35 % female & 5 % minority by 12/09.	Joyce and Becky have brought this to the attention of the Central Management Group. Dave Lieb discussed this topic with Development Directors at a Spring 2006 meeting. Key initiative for the 2006-2007 year we now have a unique opportunity to help shape the membership of the next campaign committee.	VP of DDAR	Rod Kirsch Peter Weiler	2005-06
	B	As of 7/1/04 the PSAA's governing body, the Alumni Council, is 15.2 %minority & 40 % female. Alumni Council believes that, to be effective, it needs to "look" like the student body. In terms of minority representation, the Alumni Council now exceeds the student body (15.2 % vs. 12%), but it falls behind in terms of female representation. Continue to ensure that diverse alumni are appointed and represented on the ballot.	As of 10/10/06 the 2006-2007 composition of council includes approximately 16% alumni of color, and 57% of council members are male and 43% of council members are female. The 2006-2007 executive board of council is 38% alumni of color (7 of 18).	Office of Alumni Volunteer Services	Kevin Barron	2005-06
	C	Identify staff from underrepresented groups who have administrative aspirations & potential and assist them in developing leadership and management skills. This would include, but not be limited to the Division's Mentor Program; the University's HRDC classes in Leadership, Management and Supervision; and the Administrative Fellows Program.	No formal action to be taken.	The Ass. VP for DDAR & Exec. Dir. of PSAA will bi-annually report to the VP for DDAR on the progress of this initiative	Peter Weiler Roger Williams Rod Kirsch Elaine Rhodes	2005-06
	D	Look at the Administrative Fellow Alumni pool for all leadership positions and identify qualified candidates who should be formally invited to apply. Each time an administrative or leadership position becomes open, the search committee will be asked to review the list of Administrative Fellow Alumni, looking for those with related expertise and experience. These individuals, who may not be aware of the opening, should receive an invitation from the search committee to learn more about the opportunity and consider applying.	Joyce Matthews will work with current DDAR Administrative Fellow Maria Russoniello to e-mail all Administrative Fellows informing them of employment opportunities in our division.	DDAR and OHR Reps.	Rod Kirsch Lisa Temple	2005-06
	E	Continue supporting the professional development of all Division administrators and leaders. Participation in existing programs, including but not limited to Mastering Supervision; The Penn State Leader; and Excellence in Leadership Management will be encouraged. Directors and managers will be nominated and encouraged to complete at least one of these programs during this planning period.	Ongoing for new and current managers by encouraging participation in existing programs.	VP of DDAR	Rod Kirsch	2005-06

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2	A	Query job candidates on their own commitment to diversity. As part of the interview process, a couple standard questions would be asked. Possible examples include: When you hear the word "diversity" what comes to mind? Could you describe any experiences you have had working with people from different backgrounds or cultures? Could you share experiences you have had managing issues of diversity in your workplace?	The 67 Sample Behavioral-Based Questions for Competencies of the new Hire Power training effort includes two questions regarding Support of Diversity - (1) Tell me about a time when you adapted your style in order to work effectively with those who were different from you. (2) Tell me about a time when you took action to make someone feel comfortable in an environment that was obviously uncomfortable with his or her presence. Make sure managers know about these questions and are actively using them in the interview process.	DDAR and OHR Reps.	Rod Kirsch Temple Weiler Williams	Lisa Peter Roger	2005-06
	B	Reference check would include one or two questions about the candidate's demonstrated skills in managing issues of diversity.	Currently evaluating interview and reference check forms to make recommendations and forward to CORED [2/3/2006 GG]. OHR will be posting a new version of the Reference Checking format for use in checking references. This should continue this year.	DDAR and OHR Reps.	Rod Kirsch Lisa Temple		2005-06

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Challenge 7

Goal	Initiative	Initiative	Update on Progress as of 6/05	Responsible	Contact	Years of
				Office	Person	Focus
1	A	Define mission and objectives of the Diversity Committee. A) Creating a business strategic plan to put these objectives, strategies, and measures in writing. B) communicating measurements to appropriate offices. C) assessing the progress of offices on a regular basis; D) creating an annual report on outcomes. E) awarding Diversity Incentive Fund monies to appropriate programs.	A) Done. B) Done. C) Posting updates to Launchpad. D) We are using the updated grid as our way to track outcomes. All of these actions take place annually.	VP of DDAR w/ the Ass.VP of DDAR, and Exec. Directors of Development and PSAA	Rod Kirsch Peter Weiler Dave Lieb Roger Williams	
	B	Appoint staff members to the DDAR Diversity Committee. Members should include: Division leader(s); Training coordinator(s); Communications professional(s); Human resources professional(s); Alumni Association programmer(s); Office of University Development fundraiser(s); and Staff assistant(s).	Done annually as terms end or members leave the Division.	VP of DDAR w/ the Ass.VP of DDAR, and Exec. Directors of Development and PSAA	Rod Kirsch Peter Weiler Dave Lieb Roger Williams	
	C	Define special charges for the Diversity Committee. Responsible Office. These charges may include: A) Consider whether or not a volunteer chair role should be created within the Executive Committee of the National Council on Penn State Philanthropy to coordinate diversity-related fundraising initiatives. B) Consider the possibility of creating a joint task force of volunteers from the Alumni Council's Diversity Committee and the Office of University Development's volunteer leaders. C) Consider whether the current mission statements and strategic plans for the Office of University Development and the Penn State Alumni Association appropriately reflect the University's strategic emphasis on diversity. Ensure that goals, strategies, and actionable steps toward achieving diversity are in both plans. D) Articulate a business case for diversifying leadership and demonstrate active steps to increase minority representation in leadership positions throughout the Division. E) Submit a mid-point progress report for the 2004-2009 Framework describing the impact of the Committee's efforts. F) Contact Hershey to determine how their Dean's Diversity Council G) Develop method for Division or University contacts to request fu	Process underway within subcommittees. The grid will be used as a tool to describe and track annual initiatives.	VP of DDAR w/ the Ass.VP of DDAR, and Exec. Directors of Development and PSAA	Rod Kirsch Peter Weiler Dave Lieb Roger Williams	
2	A	Allocate resources for model diversity initiatives. The Vice President of Development and Alumni Relations will establish a \$50,000 Diversity Incentive Fund that will be available through 2009. This funding will be used to augment existing initiatives already supported by the PSAA and Development. The Division's diversity committee will establish guidelines for the use of these funds and make recommendations for the VP's approval on the expenditure of these funds. This \$50,000 fund will be allocated over the five-year period of 2004-2009.	Recommendations for budget allocation have been given to Rod Kirsch and are on-going. He has approved money for internships for the coming year. Developed guidelines and wrote article for Launchpad to publicize 2/3/2006.	VP of DDAR	Rod Kirsch	2005-06
						2005-06

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	B	The Office of University Development will include diversity initiative discussions in each unit's fundraising goal setting meetings to keep diversity on the radar screen for development.	This initiative will be handled by Dave Lieb.	Exec. Dir. Of Development	Dave Lieb	
	C	Identify underrepresented friends and alumni—by race/ethnicity—in our database wherever possible so that development offices and volunteer coordinators can focus efforts on engaging these alumni and friends.	This information is self reported in the student system. When the student record is turned into an alumni record, it is pulled into the system if available. Other efforts for identification include using various codes like AIGs, Greek organizations, etc.	Information Systems	Tom Moore	
3	A	Work collaboratively to achieve these efforts. The Alumni Association and Office of University Development should contribute equally to the implementation of these plans.	Ongoing through Diversity Committee and Division Quarterly as well as through Lanch Pad and other information channels.	VP of DDAR w/ the Ass.VP of DDAR, and Exec. Directors of Development and PSAA	Rod Kirsch Peter Weiler Dave Lieb Roger Williams	
	B	Look toward other offices throughout the University to develop strategic partnerships to promote diversity.	This is our number two initiative for this year. Currently planning brown bag lunches at Hintz Family Alumni Center with Diversity Committees from other units. Teresa Hilgren is planning another brown bag lunch in September 2006 with Ken Lehrman as our guest.	VP of DDAR w/ the Ass.VP of DDAR, and Exec. Directors of Development and PSAA	Rod Kirsch Peter Weiler Dave Lieb Roger Williams	2005-06
	C	Identify and solicit support from underrepresented communities to implement diversity initiatives.	PSAA partners with annual Pow-Wow, MLK Day of Service and hosts luncheons for diverse students with members of the council. Development has a number of scholarship and program funding initiatives with a diversity focus. Work with muticultural coordinators on diversity internship candidates.	VP of DDAR w/ the Ass.VP of DDAR, and Exec. Directors of Development and PSAA	Rod Kirsch Peter Weiler Dave Lieb Roger Williams	2005-06

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Challenge 7

Goal	Initiative	Initiative	Update on Progress	Responsible	Contact	Years of
				Office	Person	Focus
4	A	Over the next five years, it is critical that the DDAR Reps take on an enhanced leadership role in collecting and disseminating data on the workforce regarding recruitment of diverse employees, retention of diverse employees, and minority applicant data for all positions.	Lisa Temple has expansive databases with information on ethnicity and gender for our employees. However, diversity is defined as being more than ethnicity and gender differences and we must continue to be inclusive in our definition of diversity to not limit our information and efforts.	VP of DDAR	Peter Weiler Roger Williams	
	B	The DDAR OHR Reps. is well positioned to enhance diversity-training opportunities for all employees and monitor our progress in attendance. This office is uniquely positioned to contribute in this meaningful way.	This is our number three initiative for this year. DDAR HR has requested a link to the HRDC page with a Launch Pad article to follow on the many diversity trainings that are available. Plan a brown bag lunch with diversity speaker.	VP of DDAR	Peter Weiler Roger Williams	2005-06