

**Feedback on A Framework to Foster Diversity at Penn State: 2010–15 and  
2014–15 through 2018–19 Diversity Initiatives**  
Fall 2014  
**Finance & Business**

The 2014–15 through 2018–19 strategic plan provided by Finance & Business (F&B) helps the unit to take another step towards its goals for diversity and inclusion. The unit is commended on its detailed report on six of the seven 2010–15 *Framework* Challenges in Appendix F (i.e., progress made, efforts planned, strategic indicators to gauge progress, and specific data). Diversity has been a significant part of the unit’s strategic planning process for two decades, and it continues to uphold diversity and inclusion among its core values and strategic priorities. Thus, F&B focuses on proactive recruiting and retention practices, using accountability metrics and fostering a diversity culture through communication. The unit has further strengthened diversity in its Supplier and Contractor Diversity program. It encourages cultural competence and has seen improvement in the climate for diversity and inclusion.

F&B outlines a broad definition of diversity in its strategic plan, which includes veterans, women, LGBT, the disabled, and other diversity groups; however, these groups (mentioned on page 102) would benefit from an in-depth focus on how initiatives in the plan offer them support. One diversity group that F&B has put some positive effort into addressing is racial/ethnic diversity of its employees. The review team recognizes the challenges that F&B faces, given the fact that, compared to other administrative areas, the unit is highly diverse in terms of economic and educational backgrounds and skills. F&B has exercised flexibility and high functionality in meeting the operational needs of such a diverse spectrum. F&B can build on such strengths to continue progressing not only with respect to racial/ethnic diversity but also with respect to other diversity categories. ***RESPONSE: For this time period, F&B is focusing on racial/ethnic recruitment and retention as it is the most stagnant of our employee demographics. F&B is fully committed to the entire spectrum of diversity throughout the organization and will continue to respond to the needs of all of our diverse employees and stakeholders. Educational and celebratory programs are offered throughout the year in support of this commitment. Employee Resource Groups (through the Office of Diversity & Inclusion) exist for all those referenced in our definition of diversity and inclusion so that they have a means to voice their concerns and to participate in our strategic efforts. Additionally, the 2014-15 to 2018-19 Strategic Plan Priority Team for Advancing Diversity & Inclusion maintains members that represent all demographics in the F&B workforce.*** The Office of Human Resource (OHR) has been tasked with leading the effort to create, implement, and measure an equitable process to recruit and retain a diverse workforce across the University, and plays a critical role in promoting the university’s vision on diversity and inclusion.

F&B is a complex unit containing many departments charged with direct diversity initiatives, so it is important for the unit to integrate the various streams of diversity activities into the overall strategic plan. Internally, F&B has identified Advancing Diversity & Inclusion as one of its five strategic priorities, using seven guiding principles for operational success and eight core values in an effort to improve on the quality of the products they offer. This thoughtful and deliberate approach to infusing diversity throughout the unit’s operations can be considered a best practice. Measurable goals (see page 36) and appropriate assessment and implementation plans for these goals augment support for diversity and reflect ongoing impact. The review team agrees that advancement of diversity can be a roadmap to positive change and improvement in climate for the unit as a whole. Tracked action items, like the climate survey, should lead to improved methods over time to help individuals better understand and value diversity and subsequently embrace practices that will sustain progress. Such diversity metrics have the potential to structure objective and measurable change. One laudable initiative is the establishment of the Office of Diversity & Inclusion with a director who reports directly to the senior vice president for Finance & Business. The review team suggests the director receive a dedicated *permanent* budget.

The review team values F&B’s potential diversity impact and scope and its ability to leverage its expansive constituencies to support the University’s diversity goals. With this much influence and power, a thoughtful and collaborative approach to diversity could have enormous positive implications for the University. To that end, the

review team suggests that F&B work collaboratively with the Offices of Educational Equity and Planning and Institutional Assessment to create a data driven approach to its diversity imperatives. **RESPONSE: We will continue our collaborations with these offices as well as with the Office of Affirmative Action.**

### **Campus Climate and Intergroup Relations**

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

- A broad definition of diversity is presented. To keep it carefully aligned with current plans and programs it is renewed regularly.
- Leadership also thoughtfully reviews and signs a diversity and inclusion statement annually.
- F&B's creation of an Office of Diversity and Inclusion in 2011 centralizes its diversity efforts; this is commendable.

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

- The development and deployment of an employee Finance & Business Diversity & Inclusion Climate Survey conducted on a regular basis is laudable.
- Progress made in identifying more military veterans among the unit's workforce allows the unit to better serve this population's specific needs; this action could positively influence climate.
- Creating a cultural and heritage fair open to all Finance & Business employees, shows promise.
- Increasing the number of diversity-focused employee resource groups has potential.

### **Representation (Access and Success)**

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

- The review team appreciates the information provided on student employees and finds their student-centered approach to be exemplary.

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

- Data is provided that show a decreased number of employees from diverse racial/ethnic groups during the 2010–13 time-frame. The review team supports the plan to enrich the racial/ethnic makeup through pro-active recruitment measures.
- While the number of military veterans also decreased during this period, according to the self-identification process in the Human Resource (H. R.) database, the new outreach efforts from F&B reflect otherwise. The overhaul of the H. R. Information System and the H. R. Transformation process could be helpful if concerted efforts are put in place to accurately track specific populations and their needs.
- It is unclear if the unit is focusing efforts on recruitment in other areas. **RESPONSE: For this time period, F&B is focusing on racial/ethnic recruitment and retention as it is the most stagnant of our employee demographics. A new hiring protocol for opened positions is being developed within F&B to assist search teams in their efforts to broadly seek diverse applicants and interview candidates from all demographics pools.**

### **Education and Scholarship**

#### ***Challenge 5: Developing a Curriculum That Fosters U.S. and International Cultural Competencies***

### **Institutional Viability and Vitality**

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

- Increased diversity in leadership positions across the unit has impact.
- Exploring career pathways to leadership for diverse employees is encouraging.

- Best practice: Support for participation in Leadership Centre County by sponsoring diverse candidates.

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

- Potential best practices: nurtured diversity efforts in sub-units like Auxiliary & Business Services and OPP, and adoption of the Cultural Competence Continuum.
- Best practices: establishing the Office of Diversity & Inclusion and appointing a director who has oversight to coordinate and develop diversity efforts across the unit, providing the director a straight reporting line to the senior vice president for F&B in addition to being part of the leadership team.