

University Advancement Inclusive Excellence Plan

Introduction

University Advancement's work toward becoming more diverse, equitable, and inclusive has been ongoing for several years. University Advancement first formed a Diversity & Inclusion committee in 2018. This committee undertook a year-long effort to gather information on diversity and inclusion within University Advancement including performing research on diversity statistics, benchmarking with similar institutions, investigating resources, and exploring University Advancement's workplace culture. The findings of the committee were then shared with University Advancement senior leadership in the fall of 2019.

The efforts of the Diversity & Inclusion committee laid the groundwork for a new working group, formally the Diversity, Equity, and Inclusion (DEI) working group, formed in 2020. This new committee was co-chaired by two members of the senior leadership team and comprised of staff from all levels of the organization. The committee focused specifically on building University Advancement's plan for Inclusive Excellence. The goals and objectives provided herein are the result of extensive research and self-assessment by the DEI working group and its four subcommittees which focused on making recommendations for goals and objectives in the areas of Access + Success, Climate + Intergroup Relations, Community + Partnership, and Education + Scholarship.

Self-Assessment

Access + Success

The Access + Success subcommittee worked in close conjunction with HR representatives to review and discuss University Advancement's current application, recruitment, and hiring processes. They performed a thorough review of all education requirements for 35 University Advancement positions, looking for any areas that could be updated or revised, and discussed appropriate education and degree requirements with UVA HR. The group also discovered a need for and researched opportunities for informal mentoring that could be implemented in University Advancement.

Climate + Intergroup Relations

The Climate + Intergroup Relations subcommittee reviewed the 2018 Diversity & Inclusion committee's research which included focus groups, surveys, and small format conversations, as well as the former committee's recommendations to University Advancement leadership. They looked at the demographics of the University Advancement community and researched DEI practices across UVA and at other institutions, including several practices that could be adapted for use in University Advancement. The group helped formulate a workplace climate survey modeled after the Harvard Pulse survey example provided by the Office for Diversity, Equity, and Inclusion (ODEI). Alongside other members of the DEI working group as a whole, the group modified the pulse survey example to gauge specific areas of concern within University Advancement and worked in partnership with the ODEI to administer the survey for all University Advancement staff. Once the results were received from the ODEI, the group reviewed and discussed the results and incorporated the key findings of the survey into their

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recommendations below, particularly related to needs of staff in the areas of psychological safety and authentic participation. In order to be as transparent as possible, the results of the climate survey were also shared with all Advancement staff.

Community + Partnership

The Community + Partnership subcommittee began by exploring the IE Framework and by defining “community” as broadly as possible. UVA’s community encompasses the University (students, staff, faculty), the Charlottesville community, the surrounding region, and, as Virginia’s flagship university, the entire commonwealth. The group included any alumni around the country and globe to be within Advancement’s overall “community”. For the purposes of serving the community and being a good neighbor, the group decided to focus on prioritizing individuals and populations in the greatest need of UVA’s resources and engaging our broader community in serving them by partnering with the Office for Diversity, Equity, and Inclusion and leveraging resources available in University Advancement to support their efforts.

In the area of “partnership”, the group focused on defining Advancement’s strengths. Recognizing that Advancement cannot solve every diversity, equity, and inclusion issue at UVA, the group identified several areas of strength including our power to convene, our skills in communications, our ability to build meaningful relationships, our knack for “translating” academic programs and priorities into lay language, and our talent in engaging the broader UVA community, among others.

The group also focused on areas of improvement pointed out in the results from the workplace climate survey, specifically the need to provide University Advancement staff with opportunities for collaborative, community-based service. These statements from the survey indicated areas for improvement: “Survey respondents also did not indicate overall agreement with the statement that University Advancement manages diversity effectively (Average score = 3.7, the lowest for any concept measured). Similarly, survey respondents did not indicate agreement with the statement that they received support for working with diverse groups and in cross-cultural situations (Average score = 3.9).”

Education + Scholarship

The Education + Scholarship subcommittee worked to identify gaps in awareness and cultural competency amongst University Advancement staff. In October of 2020, the group launched a resources page for the entire Advancement community to provide a place for updates on the DEI working group’s progress with the Inclusive Excellence plan and also a means for the Advancement community to interact and engage with DEI resources and stories. Through this resources page, the group was able to identify gaps in training and resources available to University Advancement staff and the full Advancement community.

Plan Goals

Access + Success					
2030 Vision: Recruit and support exceptionally talented, diverse, and service-oriented students. Recruit, support, and retain excellent and diverse faculty and staff.					
Goals/Objectives	Actions	Outcomes (Data/Metric)	Timeframe(s)	Responsible Office/Position	Funding/Resource Allocation
Increase diversity across all positions within University Advancement in order to more closely reflect or exceed UVA's overall staff demographics.	<ul style="list-style-type: none"> Evaluate position postings to ensure experience and educational requirements are appropriate to the given position. Include a statement on University Advancement's commitment to diversity on all job posts. Ensure all job descriptions are gender neutral. Reassess recruitment marketing methods, i.e., establish social media best practices and expand advertisement on CASE job central to all positions. Require all hiring managers complete UVA's EOCR's online "Employment Equity" training. Hire recruitment search firm(s) when appropriate. Ask all interview candidates a question related to their experience with DEI. Develop an interview rubric for all searches. 	<ul style="list-style-type: none"> Review University Advancement diversity baseline against UVA general employee population on an annual basis to close gap: University Advancement 14% as of 2019) All UVA 26% as of 2019) diversitydata.virginia.edu) Tangible results in both policies and procedure, perhaps outlined in periodic progress reports Staff has increased trust and skills in the recruitment and hiring process 	<ul style="list-style-type: none"> Training for hiring managers: immediate Recruitment search firms: 6-12 months Develop rubric: 3-15 months Reassess postings and recruitment methods: 6-12 months Create a welcome video: 12-18 months 	<ul style="list-style-type: none"> University Advancement Leadership Hiring managers UVA Human Resources Advancement Communications Ad hoc working groups as needed 	

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	<ul style="list-style-type: none"> • Encourage managers to include a DEI or cultural awareness goal or objective in performance conversations. • Create a Welcome to University Advancement recruitment video. 				
<p>Build and promote a career development process to retain and support current employees.</p>	<ul style="list-style-type: none"> • Reestablish and evaluate the defined job families/ roles within University Advancement and increase awareness of career path available to all employees. • Establish auditing of current roles to ensure current employees have positions in line with their current duties. • Coordinate with UHR to make changes on job families and make recommendations for changes to individual positions as needed. • Communicate career development opportunities. • Establish an informal mentoring / networking program and, upon approval, recruit volunteers to serve as mentors. • Explore development of a formal mentoring program 	<ul style="list-style-type: none"> • Number of positions that have completed audit and percentage of positions with changes. • Staff has tangible knowledge of career paths within University Advancement. • Creation of a peer led mentoring program and annual assessment of satisfaction. 	<ul style="list-style-type: none"> • Career path review: 12-36 months • Mentoring: 12 months 	<ul style="list-style-type: none"> • UVA Human Resources • University Advancement Leadership • University Advancement Managers • Ad hoc working groups as needed 	

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	with the appropriate outcomes and professional staff support, available to all staff with emphasis on managers.				
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Climate + Intergroup Relations					
2030 Vision: <i>Continuously promote and strengthen an inclusive community of trust, a culture of integrity, mutual respect, excellence, collaboration, and innovation.</i>					
Goals/Objectives	Actions	Outcomes (Data/Metric)	Timeframe(s)	Responsible Office/Position	Funding/Resource Allocation
Improve psychological safety and authentic participation for all staff.	<ul style="list-style-type: none"> • Hold small focus group conversations within University Advancement around psychological safety run by a knowledgeable and neutral 3rd party. • Administer annual pulse survey to track progress and give opportunity for feedback. • Create culture for employees to be authentic self by respecting others such as including pronouns in communications. • Increase ways for University Advancement staff to communicate issues and successes they experience around DEI related topics. 	<ul style="list-style-type: none"> • Continued improvement in perceptions of psychological safety and authentic participation amongst staff evidenced by results of annual pulse survey. 	<ul style="list-style-type: none"> • Next 12 months • Ongoing 	<ul style="list-style-type: none"> • University Advancement Leadership • Advancement Community Learning • Partnership with UVA DEI office on annual survey • Ad hoc working groups as needed 	

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	<ul style="list-style-type: none"> • Consider creating an anonymous feedback/suggestion mechanism. • Incorporate University Advancement’s culture around diversity, equity, and inclusion into the Vice President for Advancement’s new hire meetings. 				
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Community + Partnership					
2030 Vision: Be a strong partner with and good neighbor to our region, contributing to economic and social well-being by providing accessible healthcare, innovative education, opportunity, and engaging alumni.					
Goals/Objectives	Actions	Outcomes (Data/Metric)	Timeframe(s)	Responsible Office/Position	Funding/Resource Allocation
Increase engagement of diverse and historically marginalized constituencies, grow diverse volunteer leadership and enhance local community connections.	<ul style="list-style-type: none"> • Create intentional inclusive programming to acquire and retain constituents and donors from historically marginalized backgrounds. • Select event venues that are welcoming to participants. • Increase diversity of Advancement boards through targeted engagement of diverse populations. • Grow partnership with the Office for DEI to include mechanism for 	<ul style="list-style-type: none"> • % of diverse constituents attending events • More diverse board and volunteer leadership reflective of UVA’s alumni and student populations • Ability to meet identified needs from the Office of DEI 	<ul style="list-style-type: none"> • Ongoing (concerted effort over next 12-18 months) 	<ul style="list-style-type: none"> • Event Planning Staff • Ad hoc working groups as needed • Director of Development, DEI • DEI Community of Practice • University Advancement Managers who support and oversee volunteer boards 	

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	receiving feedback from the community regarding Advancement programming and develop services for University Advancement to serve the local community.				
Increase awareness of University Advancement’s commitment to diversity, equity, and inclusion with our constituents and the broader UVA community.	<ul style="list-style-type: none"> • Develop tools and talking points about DEI and integrate into relevant Advancement sites and collateral materials. • Create a page on the Honor the Future campaign site that elevates constituent stories related to diversity, equity, and inclusion in philanthropy. • Ensure marketing materials reflect the demographics of our constituents. • Frequent communication from senior leadership on DEI efforts. • Share progress, reports, and outcomes on the DEI Hub. 	<ul style="list-style-type: none"> • Broader constituent understanding of and engagement with Advancement’s and UVA’s efforts relating to diversity, equity, and inclusion 	<ul style="list-style-type: none"> • Next 12-18 months 	<ul style="list-style-type: none"> • Advancement Communications • Advancement Community Learning • Director of Development, DEI 	

Education + Scholarship					
2030 Vision: Enable faculty, staff, and students to work across traditional boundaries and prepare servant-leaders to shed new light on enduring and profound questions in our diverse community and globally connected world.					
Goals/Objectives	Actions	Outcomes (Data/Metric)	Timeframe(s)	Responsible Office/Position	Funding/Resource Allocation
Develop awareness and cultural competency of all University Advancement staff through interaction with DEI resources on the Advancement Hub and other DEI learning opportunities.	<ul style="list-style-type: none"> • Create central DEI resource page on the Hub and assess effectiveness on a semi-annual basis. • Actively solicit/encourage participation through the “stories/narratives” section on the Hub. • Create a DEI communications plan to feature new and notable contributions to Hub with cross promotion in Take-5 Newsletter on a quarterly basis. • Create a robust quarterly DEI training curriculum for staff. Examples include: <ul style="list-style-type: none"> • Provide standard DEI training for all new hires. • Navigating difficult conversations and differing opinions • Critical response and crisis control framework • Self-awareness, effective 	<ul style="list-style-type: none"> • Staff are prepared to inspire a culture of philanthropy around our diverse community of colleagues, alumni, and friends. • Staff understands priority and commitment to DEI initiatives within in UVA/University Advancement. • Community sense of awareness and involvement in DEI goals. • Employee touchpoints about Hub twice a year to assess gaps that may exist. • Regular submissions received for DEI resources page 	<ul style="list-style-type: none"> • Next 12 months and ongoing • Launch of DEI Hub page – immediately • Touchpoint surveys June and December (EOFY and EOCY) to assess gaps in resources • Quarterly-scheduled communication 	<ul style="list-style-type: none"> • All University Advancement staff • UVA Human Resources • Advancement Community Learning • University Advancement Managers 	

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	<p>communication and developing strategy.</p> <ul style="list-style-type: none"> • Data literacy training for units to understand their historical constituent portrait metrics. • Make implicit bias training available to all staff annually and explore incorporating this into the University-wide mandatory trainings. • Individual units create plans to incorporate DEI into their processes and projects. 				
<p>Encourage every member of the team to participate in improving our DEI efforts.</p>	<ul style="list-style-type: none"> • Examples of involvement could include sitting on a committee, reviewing reports, helping make a video on diversity, leading a session, conducting benchmarking, and sharing resources on the Hub among others. • Educate managers on how to include in performance conversations to gauge 	<ul style="list-style-type: none"> • Staff are more engaged with and feel ownership of diversity, equity, and inclusion efforts within University Advancement. 	<p>Immediately</p>	<ul style="list-style-type: none"> • All University Advancement staff • University Advancement Managers 	

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	how individual employees are working towards a more diverse and inclusive work environment.				
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Infrastructure + Investment		<i>2030 Vision: Be a community that consistently lives its values and ensure that our systems enable our students, faculty, and staff to do their best work.</i>			
Goals/Objectives	Actions	Outcomes (Data/Metric)	Timeframe(s)	Responsible Office/Position	Funding/Resource Allocation
Invest in a position dedicated to serving the entire Advancement community as a convener and coordinator of DEI fundraising efforts and as the leader of fundraising efforts for centralized, pan-University priorities.	<ul style="list-style-type: none"> • Create position and hire Director of Development for Diversity, Equity and Inclusion. 	<ul style="list-style-type: none"> • Increased collaboration and coordination on fundraising for DEI interests across Grounds 	Immediately	<ul style="list-style-type: none"> • AVP for Development 	
Create a Community of Practice for DEI	<ul style="list-style-type: none"> • Secure executive sponsor and co-facilitator from University Advancement and Foundations. • Develop goals and timeline in conjunction with other Advancement Communities of Practice. • Create ad hoc working groups to work on issues and efforts as needed. 	<ul style="list-style-type: none"> • Increased collaboration and awareness across Grounds • Involvement from a diverse group of colleagues 	6 months	<ul style="list-style-type: none"> • University Advancement Leadership • Advancement Community Learning 	

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Communication Plan

The Vice President for Advancement will share the final version of the Inclusive Excellence plan with University Advancement staff as part of a communication on the DEI working group's achievements, including results from the workplace climate survey and plans for future DEI opportunities and initiatives. The Inclusive Excellence plan will also be shared on the DEI resources page on the Advancement Hub. This plan will be shared with AVP to confirm responsible office/position and to make changes as necessary.