

# UVAFinance's Inclusive Excellence Plan

## Introduction

From the August 2019 adoption of the University's strategic plan, [Great and Good: The 2030 Plan](#) to the August 2020 adoption of the Racial Equity Task Force report, [Audacious Future: Commitment Required](#), UVAFinance has been evaluating how we could take an intentional approach to the development of our Inclusive Excellence Plan.

As a first step, in Summer 2020, we updated our core values and adopted a statement that "we value diversity, equity, inclusivity and respect. We strive to create a culture where every team member feels included and valued, and where different backgrounds, perspectives, and ideas are celebrated." But we knew that this was not enough.

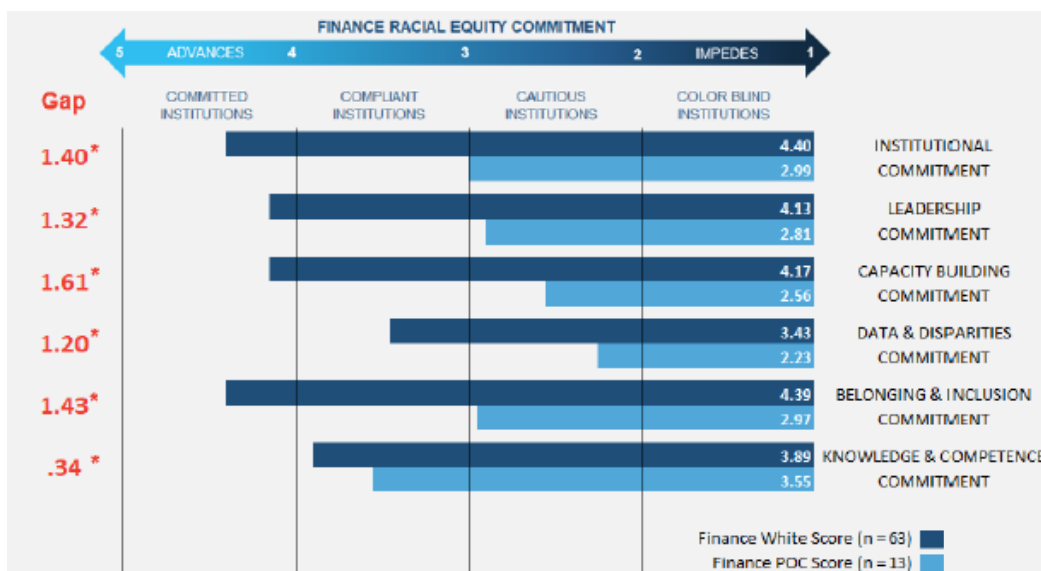
We began to get to know ourselves better, introducing optional "Sprint Discussions." The first Sprint Conversation, centered around one episode of Emmanuel Acho's *Uncomfortable Conversations with a Black Man*, lasted for two hours and began to dig into complex topics related to racial equity. UVAFinance quickly realized that we would benefit from a defined approach and external guidance. As a result, we engaged the [Racial Equity Group](#) (REG), beginning early in 2021.

Under the expert leadership of REG's CEO, Bird Guess, our extended leadership group received extensive training on racial equity. REG conducted a UVAFinance staff survey (Racial Equity Audit Assessment) and helped our leadership team to evaluate the results. We then received coaching on how to utilize the results to identify needed areas of emphasis and to develop measures and scorecards to evaluate our progress. With the completion of this work, we are now well-positioned to develop a strategic Inclusive Excellence plan for the UVAFinance team

## Self-Assessment

The UVAFinance Racial Equity Audit Assessment, conducted in April/May 2021 has provided clear direction on UVAFinance's current strengths, challenges, opportunities, and needs as related to equity, inclusion, and diversity issues. The survey was sent to 210 UVAFinance (including Student Financial Services, at the time), with 128 valid responses (61% response).

With the survey, we sought to measure our baseline racial equity commitment on a scale of color blind to committed institution across several leadership characteristics. We also evaluated responses by self-identified racial group to identify gaps between white staff and staff of color.



The chart below demonstrates specific areas of low, medium, and high commitment, as identified by UVAFinance staff:

|              |                          |                    |                                |          |
|--------------|--------------------------|--------------------|--------------------------------|----------|
| Introduction | <b>Executive Summary</b> | Road to Commitment | Recommendations and Next Steps | Appendix |
|--------------|--------------------------|--------------------|--------------------------------|----------|

## How Strong is Racial Equity Commitment in each Competency?

| INSTITUTIONAL COMMITMENT  | LEADERSHIP COMMITMENT  | CAPACITY BUILDING COMMITMENT   | DATA & DISPARITIES COMMITMENT   | BELONGING & INCLUSION COMMITMENT   | KNOWLEDGE & COMPETENCE COMMITMENT   |
|---|--|--|---|--|---|
| 4.16<br>UVA Finance/SFS has a written public declaration clearly stating our commitment to Racial Equity.   | 3.95<br>Department managers and leaders demonstrate a commitment to advancing Racial Equity.   | 3.21<br>UVAFinance/SFS often meets with communities of color to discuss the impact of our services, decisions, projects and programs.                                | 3.27<br>My department routinely analyzes data on race/ethnicity to measure equitable contracting and procurement.                     | 4.40<br>In my department I am treated like I belong.   | 4.55<br>I understand why it's important for my employer to focus on Racial Equity.  |
| 4.35<br>A functioning Racial Equity Taskforce or Committee exists inside UVAFinance/SFS.  | 4.26<br>My immediate supervisor is committed to advancing Racial Equity.   | 3.77<br>UVAFinance/SFS partners with other institutions and/or community organizations to advance Racial Equity.   | 2.72<br>My department evaluates data by race/ethnicity to ensure equitable service delivery to all stakeholders.                      | 3.89<br>I do not need to conform to the dominant culture or downplay or hide how I am different to be treated like I belong. | 3.52<br>I can identify examples of racial biases during interactions with colleagues who are racially and culturally different from me.   |
| 4.72<br>The University has a Chief Diversity, Equity and Inclusion Officer.   | 4.02<br>Leadership in my department encourages staff to participate in Racial Equity educational opportunities.  | 3.73<br>UVAFinance/SFS actively seeks representatives from communities of color to serve on boards, committees and commissions.                                      | 2.76<br>My department routinely uses race/ethnicity data to monitor equitable practices for performance evaluations and promotions.   | 3.86<br>I feel comfortable expressing my natural/cultural identity at work.  | 3.50<br>I feel comfortable talking about race and equity within my workplace setting.   |
| 4.18<br>Training and development opportunities intended to build skills for implementing Racial Equity are made available to all levels of staff. | 3.66<br>Practices exist inside my department to ensure decision-making on policies, services, budgets and programs is done with Racial Equity in mind.   | 3.61<br>Racially diverse stakeholders are actively solicited to provide input during divisional and unit planning, decision-making on services and project delivery. | 2.73<br>During budget and resource allocation planning, my department routinely analyzes race/ethnicity data to ensure Racial Equity. | 4.07<br>I am able to influence decisions that affect my work, projects and program service areas.                            | 4.07<br>I understand what racial inequity looks like in daily operations, service delivery, policies, practices, procedures and programs. |
| 2.90<br>Performance evaluations for managers and senior leadership include clear Racial Equity expectations and goals.                            | 3.88<br>Regardless of race, all employees have equal opportunity to advance, including receiving good job assignments, promotions, and salary increases. |  | 3.20<br>My department routinely analyzes data on race/ethnicity to measure equitable practices for recruitment and hiring.            | 3.97<br>I am often invited to voice my opinion in meetings where important decisions are made.                               | 3.87<br>I have a clear understanding of what it means to advance Racial Equity in UVAFinance/SFS.   |
| 2.63<br>All departments within UVAFinance/SFS have established Racial Equity scorecards and indicators of performance and progress.               | 3.31<br>Department leaders are held accountable for improving Racial Equity.   |  |   | 3.96<br>Mentoring and coaching are available to me.  | 3.37<br>I understand how my role, tasks and projects are aligned to Racial Equity goals.  |



The darker blue boxes, on page 2, indicate the areas identified as the lowest commitment and emphasizes the need for adopting performance expectations and collecting and reporting on key data related to racial equity. These areas will be emphasized in our IE plan.

UVAFinance's IE approach, including the work with the REG, translates well to the University's IE framework dimensions:

- **Access & Success:** with a focus updating UVAFinance human resource practices, including expanding and diversifying employee recruitment, hiring, promotion, and mentorship activities.
- **Climate & Intergroup Relations:** with a focus on cross functional "Equity Action Teams" to increase interactions and conversations within the group, such as employee on-boarding and continuing Sprint Conversations and Book Discussions (such as this summer's discussion of *Caste* by Isabel Wilkerson).
- **Training & Development:** with a focus on training UVAFinance staff (LinkedIn Learning plus two sessions with REG (*Bigger Than Racism* and *Allies for Racial Equity*))
- **Infrastructure & Toolkit:** with a focus on establishing DEI-related performance measures, and periodically surveying UVAFinance staff, using the REG audit assessment process.
- **Community & Partnerships:** with a focus on improving our understanding of racial equity, particularly in the local community, creating meaningful internships for students in the local schools, and expanding UVAFinance's spend with local, small, woman-owned, and minority-owned firms.

UVAFinance's IE plan, including goals, actions, and implementation plan for the period through December 2023, begins on the following page.

Goals, Actions, Measures, and Implementation Plan, Through December 2023

| 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/Metrics)  | Timeframes               | Responsible Office/Position                                | Funding/Resource Allocation |
| 1. Implement and standardize HR practices/processes across UVAFinance (Recruiting, Interviewing, Selection, Internal Promotion, Performance Management, Compensation)  | a) Use standard language for job postings, including the core value of "Diverse and Inclusive Teams". Add to toolkit*   | 100% of job postings will include shared language on DEI core value.   | Spring 2021 and ongoing  | Hiring Managers  | N/A                         |
|  | b) Widen recruitment efforts to include HBCUs, PVCC, Community Job Fairs.   | Increase diversity** of candidate pools with targeted advertising.   | January 2022 and ongoing | Hiring Managers; HR Business Partner (HRBP) HR Recruitment | TBD                         |
|  | c) Develop internal process to communicate and solicit recommendations/ referrals for open positions; consider adding incentives for referring underrepresented candidates. | Increase diversity** of candidate pools, measured by # of diverse candidates in pool relative to labor market availability and % moved to interview process. | January 2022 and ongoing | Extended Leadership Team; Hiring Managers; HRBP            | TBD                         |
|  | d) Develop and post a "Hiring Manager's Toolkit." Toolkit will include resources identified with an asterisk (*) below.   |  | January 2022             | Bus Serv Group Dir; IE Team; Communications Manager        | N/A                         |
|  | e) Ask DEI questions in all interviews. Sample questions for individual performer and manager roles   | 100% of interviews will include a DEI-related question to assess understanding and   | Spring 2021 and ongoing  | Hiring Managers  | N/A                         |
|  |   |  |                          |  |                             |

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|  | included in toolkit.*  | commitment to DEI.  |                                   |   |     |
|  | f) Utilize diverse search committees for all positions for which we utilize a search committee. Guidelines included in toolkit.*                 | 100% of search committees will be diverse (women, men, POC,etc).                                      | Effective immediately and ongoing | Hiring Managers; HRBP                               | N/A |
|  | g) Provide search process orientation bi-annually for all employees and annually for search committee members. Orientation included in toolkit.* | 75% participation in orientation (100% of those participating in searches).                           | January 2022 and ongoing          | Business Services Group Director; Training Director | N/A |
|  | h) Review application and interview process annually.  | Improved processes; equity in application and interview process.                                      | January 2022 and ongoing          | Extended Leadership Team                            | N/A |
|  | i) Develop a process to identify high potential internal (both UVA Finance and UVA) candidates for promotion.                                    | More diversity** in candidate pools; promotion opportunities.   | Implement by fall 2022            | Extended Leadership Team; HRBP                      | N/A |
|  | j) Implement required internal promotion procedures. Procedures included in toolkit.*  | 100% of vacancies will be open to qualified internal candidates.                                      | Spring 2021 and ongoing           | HRBP; Hiring Managers                               | N/A |
|  | k) Add DEI-related goal to each team members' performance plan; manager DEI-related goal will emphasis managerial responsibilities.              | All team members will be evaluated on their contributions to an inclusive and respectful environment. |                                   | HRBP; Extended Leadership Team and Managers         | N/A |

|   |  |  |                        |                                     |     |
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|   | Example goals included in toolkit.*  |  |                        |                                     |     |
|   | l) Offer a workshop to all hiring officials on how to better develop and evaluate job qualifications to eliminate bias. Tips included in toolkit.* | All managers participate in workshop.    | Spring 2022            | HRBP, VPDEI staff; Hiring Officials | N/A |
|   | m) Evaluate compensation practices for equity.   | TBD                                      | TBD                    | HRBP and Leadership Team            | TBD |
| 2. Offer Career Development Opportunities | a) Develop and implement a mentoring program within UVAFinance.  | Will be determined by level of interest. | Implement by Fall 2022 | IE Team; Extended Leadership Team   | N/A |



| 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 |
| 3. Operationalize Inclusive Excellence within UVAFinance  | a) Create cross-functional UVAFinance "Equity Action Team" – consisting of representatives from each unit. Post list of team members in toolkit. *                      | At least 1 member from each unit; ensure standardization/ consistency of processes and procedures.                 | Begin January 2022      | Senior Leadership Team; Current IE Team          | N/A                         |
| 4. Promote Personal Development and Multicultural fluency for all UVAFinance team members   | a) Continue Sprint discussions and book discussions; strive to include more people in planning/facilitating and participating; post discussion topics/resources online* | Bi-weekly discussions; 20 per year; increase knowledge and awareness of DEI issues; promote inclusivity.           | Summer 2020 and ongoing | Extended Leadership Team; Current/Future IE Team | N/A                         |
|   | b) Ensure multicultural inclusion in existing and future events, including but not limited to holiday party, spring/fall fling, website, blog posts, social media, etc. | Evaluate communications around all activities and events to remove unintentional bias and ensure active inclusion. | Summer 2020 and ongoing | Communications Manager                           | N/A                         |
| 5. Create a culture of inclusivity across UVAFinance  | a) Routinely assess team member engagement across utilizing the REG Audit Assessment, as a baseline.  | Annual assessment  | Spring 2021 and ongoing | Current/Future IE Team                           | TBD                         |
|   | b) Publish a blog article about the official assessment from REG; post and send by email.   | Awareness of REG audit assessment among UVAFinance and others.   | October 2021            | Current IE Team; Communications Manager          | N/A                         |

|  |   |  |             |                                |     |
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|  | c) Evaluate process around exit interviews (should they be required?) and include questions about culture/engagement/inclusion. | 100% of exit interviews will include engagement/inclusion questions. | Spring 2022 | HRBP; Extended Leadership Team | N/A |
|--|---|--|-------------|--------------------------------|-----|

**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 |
|--|---|---|--------------------|---|-----------------------------|
| 6. Offer Professional Development Opportunities to expand DEI knowledge and skills | a) Develop and implement annual DEI training. (IE grant)  | Increase percentage of employees trained each year (from ~85% in 2021, with goal of 100%. | TBD                | Training Director; Managers                           | TBD                         |
|  | b) Pursue opportunities to share our experiences in conferences and other venues.   | TBD   | TBD                | Extended Leadership Team; Training Director           | TBD                         |
|  | c) Ensure employees of color have equal opportunities to participate in professional/leadership development programs, projects, workgroups, and committees. | Will add professional development opportunities to Toolkit.*                              | TBD                | Extended Leadership Team; Managers; Training Director | TBD                         |
|  | d) Develop and implement training for UVA employees involved with purchasing.   | 100% purchasing end-users will complete training.   | Spring/Summer 2023 | PSDS; Training  | TBD                         |

**Infrastructure + Investment** **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.**

| Goals/Objectives | Actions | Outcomes (Data/Metric) | Timeframe(s) | Responsible Office/Position | Funding/Resource Allocation |
|------------------|---------|------------------------|--------------|-----------------------------|-----------------------------|
|------------------|---------|------------------------|--------------|-----------------------------|-----------------------------|



|   |   |   |                             |  |     |
|---|---|---|-----------------------------|--|-----|
| 7. Make data measurable and available to UVAFinance team members    | a) Create and publish a DEI dashboard tracking progress toward our DEI goals and actions items.                                 | Awareness of DEI goals and progress toward actions among UVAFinance and others. | TBD                         | AVP Finance Strategy; Communications Manager | N/A |
|   | b) Create DEI section on UVAFinance website and keep updated; include a timeline of actions.                                    | Awareness of DEI goals and progress toward actions among UVAFinance and others. | October 2021                | AVP Finance Strategy; Communications Manager | N/A |
|   | c) Share updates in UVAFinance Blog digest.   | Awareness of DEI goals and progress toward actions among UVAFinance and others. | Summer 2020 and ongoing     | Communications Manager                       | N/A |
| 8. Allocate resources for DEI through UVAFinance budget development | a) Develop and allocate resources to support IE effort, training needs, recruitment, internships, annual audit assessment, etc. | Line item in annual UVAFinance budget established.                              | Fall 2021 for FY2023 budget | VP Finance/ AVP Fin Strategy                 | TBD |

| <b>Community + Partnership</b>   |   |                               |                     |  |                                    |
|--|---|-------------------------------|---------------------|--|------------------------------------|
| <i>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.</i> |   |                               |                     |  |                                    |
| <b>Goals/Objectives</b>  | <b>Actions</b>  | <b>Outcomes (Data/Metric)</b> | <b>Timeframe(s)</b> | <b>Responsible Office/Position</b>           | <b>Funding/Resource Allocation</b> |
| 9. Increase UVAFinance's spend with local, small, woman-owned and minority-owned vendors.  | a) Seek ways to utilize local, small, women-owned, and minority-owned business and firms engaged by UVAFinance, including but not limited to catering, supplies, consulting firms, and other. | TBD                           | 3 years-by FY 2025  | Business Services Group and other purchasers | TBD.                               |
|  | b) Champion supplier diversity goals and initiatives, as  | TBD                           | TBD                 | Leadership Team                              | TBD                                |

|   |  |                    |                          |  |     |
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|   | identified in the Supplier Diversity strategic roadmap.  |                    |                          |  |     |
| 10. Increase opportunities for local students | a) Create meaningful internship opportunities open to students at Virginia HBCUs, PVCC, and local high schools, targeting POC and with a focus on accounting, finance, business, training or other relevant field. | 2 interns per year | Implement by Summer 2023 | Extended Leadership Team; Managers; Work with HR | TBD |
|   | b) Consider opportunities to help local youth identify a path to finance careers (for example Junior Achievement).   | TBD                | TBD                      | TBD  | TBD |
| 11. Expand firms focused on diversity efforts | Develop RFP to solicit and get under contract consultants, educators, search firms, contingent workforce groups, and other diversity-focused firms.  | TBD                | TBD                      | FinOps/PSDS                                      | TBD |

\*Included on UVAFinance website

\*With regard to recruitment/hiring effort, the diversity of candidate pools is based on available demographic data and labor market availability.

### Communication Plan

Inclusive Excellence has been a [tagged category of content](#) on the [UVAFinance blog](#) (our main channel through which we communicate with stakeholders and team members) since UVA rolled out its IE plans. We provide regular updates in the blog and its bi-weekly digest, [UVAFinance Twitter](#), direct email to our team, the [UVAFinance website](#), and internal signage at Carruthers Hall, on the activities of the Inclusive Excellence Committee within UVAFinance and other DEI initiatives and learning opportunities as detailed here:

- **IE goals and progress toward goals:** We hold ourselves accountable for the goals we have set, sharing the goal, the target date of completion, and our progress toward that goal.

- **IE activities, such as Sprint Discussions, resources, etc.:** We promote these activities, encourage them to be shared and others invited, and recap resources shared during the sessions.
- **Required and optional IE training from the IE committee:** Attendance is tracked, offerings are promoted multiple times. We provide multiple opportunities for team members to attend the trainings and ask them to participate fully in the session.
- **Programs offered by UVA DEI**

We also tackle broader DEI concepts in the UVAFinance flagship podcast, [Finance Matters](#). These discussions often feature guests from UVA and serve to deepen and broaden conversations we've had in Sprints or in DEI classes. We have had and will continue to have these discussions.

The IE team regularly shares updates in meetings such as the Extended UVAFinance Leadership Team, as well. We are deeply involved with the leadership team and afford our members opportunities to interact with leadership and further UVAFinance's IE goals.

**UVAFinance's Inclusive Excellence Team:**

|                      |                     |
|----------------------|---------------------|
| Patty Marbury, Chair | ToShun Campbell     |
| Mohammed AlKaisy     | Anne Marie Cumiskey |
| James Cobb           | Raegan Harouff      |
| Brandi Van Ormer     |                     |

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**Honorary UVAFinance team members contributing to this report:**

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