Diversity, Equity and Inclusion Strategic Plan
Five-Year Strategic Objectives, Measures and FY18 Actions

I. Diversity, Equity and Inclusion Strategic Plan: Overview

"A key part of realizing our full potential when it comes to excellence is creating a campus climate that allows diversity to flourish – in all of its forms."

Goals: Diversity, Equity and Inclusion:

Diversity: We commit to increasing diversity, which is expressed in myriad forms, including race and ethnicity, gender and gender identity, sexual orientation, socio-economic status, language, culture, national origin, religious commitments, age, (dis)ability status, and political perspective.

Equity: We commit to working actively to challenge and respond to bias, harassment, and discrimination. We are committed to a policy of equal opportunity for all persons and do not discriminate on the basis of race, color, national origin, age, marital status, sex, sexual orientation, gender identity, gender expression, disability, religion, height, weight, or veteran status.

Inclusion: We commit to pursuing deliberate efforts to ensure that our campus is a place where differences are welcomed, different perspectives are respectfully heard and where every individual feels a sense of belonging and inclusion. We know that by building a critical mass of diverse groups on campus and creating a vibrant climate of inclusiveness, we can more effectively leverage the resources of diversity to advance our collective capabilities.

Rationale: Mission, Vision, Values

The Office of Budget and Planning (OBP) is a service unit which reports to the Office of the Provost and Executive Vice President for Academic Affairs. OBP has two primary roles:

- To support the budget preparation and implementation process, and
- To serve as a key resource for decision support for leadership by analyzing and researching the faculty, staff, students and operations of the U-M Ann Arbor campus.

OBP’s staff is composed of budget analysts and institutional researchers who work collaboratively. OBP primarily serves the Provost, but also serves as a resource to Regents, senior administrators, deans, directors, and budget administrators across campus. OBP works closely with other data providers across campus, including Human Resources Information Service, Financial Operations, Financial Aid, the Office of Undergraduate Admissions, and the Registrar, to gather, analyze, and disseminate data that informs the larger UM community, peer institutions, state and national government, current and prospective students, media and the general public.
OBP is committed to enhancing the overall knowledge and understanding of faculty, staff, students, budget, finance, and other important activities of the University of Michigan-Ann Arbor through data gathering, research, analysis and reporting.

OBP provides research and analysis support in the areas of diversity in student enrollment, graduation & retention statistics, gender salary equity via annual reports and responses to ad hoc questions. This information establishes trends over time that demonstrate the university’s commitment to diversity and opportunities for further development.

OBP’s experience and knowledge regarding university and other complementary external data suggest that the office can assist in the needs of campus-wide Diversity, Equity & Inclusion (DE&I) initiatives. We currently assist campus administrators and leadership to identify and support their DE&I needs. One example is our statistical reports on diversity of students, staff, and faculty for the schools/colleges and other units.

II. Planning Process Used

During the fall of 2015, OBP underwent several staffing and leadership changes. As part of the New Leader Accelerator program, the Executive Director and staff participated in an open and candid communication process to discuss the transition and identify areas of concerns, expectations and hopes in our work. At the annual office retreat in the summer 2016, we revisited the outcomes of the fall 2015 group exercises: whether areas of concerns had been addressed and whether the expectations and hopes for the work of the office had been realized. We also explored how we can increase diversity, equity and inclusion within OBP and how we improve DE&I research through efficient and effective delivery of information. All the inputs from staff were saved in electronic format and stored on the OBP shared server. The file location was communicated to staff.

The Institutional Research team continues to assess the inventory of current efforts— a variety of institutional reports, data analyses, on-line resources managed by the team. We prioritized our commitment to DE&I by identifying areas for improvement/expansion and data gaps around DE&I issues. We also added appropriate new reports and analyses into our inventory, established a reporting standard for race/ethnicity and shared practices with other campus partners. We have also partnered with campus units to produce ad-hoc reports investigating how students of various identities differ in their U-M undergraduate experience.

OBP has leveraged staff meetings to provide consistent opportunities for dialogue, training and activities. DE&I is a standing agenda item at our monthly staff meeting, with time set aside to communicate DE&I related events and activities. Since OBP is a small office, the lead can easily seek staff input into the entire implementation process through informal check-in, lunch hour conversation, or email. Continued inclusion of staff perspectives in implementation and assessment is an essential part of this critical initiative. Two OBP internal surveys were administered to gather staff input on (1) DE&I training courses and (2) DE&I topics for guest speaker series. Based on the survey results, two DE&I conversations and one training session took place in spring 2017. Another DE&I training course is scheduled in September 2017. We will continue this group activity to enhance understanding and awareness around DE&I.

As part of efforts to assess the Year One implementation and update the plan for Year Two, a progress tracking template was created to help each staff member monitor progress on each action item in the Year One plan and propose new actions or change the action items for FY18. In addition, the unit lead conducted one on one interviews with every staff member,
including the leadership team to evaluate every action proposed for FY17 and discuss the implications and recommendation for FY18.

In conducting this planning work for Year Two, OBP staff reviewed past and current work that supports the goals identified in the plan by consulting several sources listed below:

- Staff feedback data from OBP retreat exercises (Summer 2016)
- DE&I Learning Course Survey results (Fall 2016)
- DE&I guest speaker series Survey results (Winter 2017)
- Existing reports and data on OBP website
- Usage data about the OBP website (from September 2016 to July 2017)
- Existing documents and reports stored on OBP server
- OBP’s task management tracking system
- Staff members professional development and learning opportunities
- Staff members participations in DE&I activities
- Staff members goal statements from performance evaluations
- Progress Tracking template
- Interviews with:
  - OBP Leadership Team
  - IR Team Members
  - Budget Team Members

### III. Data and Analysis: Key Findings

1) Recruitment, Retention and Development

During Year One Implementation, OBP developed an open position posting policy that explains actions to be taken to attract a diverse staff in hiring processes. In accordance with UM Central Human Resources Diversity Recruitment Initiative, our policy focuses on targeted marketing by networking open positions internally to the groups that may include people with diverse backgrounds. We also developed an office policy on staff professional development and learning opportunities. These policies are saved on OBP shared server, ensuring that all staff members can view them. Over the past year, we had two open positions in Summer 2016 and Winter 2017. The hiring committee took actions as described in this policy but our effort did not result in significantly increasing diversity in the candidate pool. Despite the challenge we face in attracting diverse candidates, our commitment to achieve this goal will continue.

2) Education and Scholarship

DE&I events and activities, either internal or external, the university programs, resources, articles and research around DE&I are publicized through emails, staff meetings and informal channels (e.g. lunch hour or casual conversations). Campus resources, opportunities and research are also catalogued in electronic format on OBP shared server, ensuring consistent and systematic educational opportunities for staff.

The following are engagement activities conducted by OBP to enhance knowledge and understanding about the DE&I issues.

- Two DE&I lunch sessions with guest speakers
  - International population at UM by Judith Pennywell in March 2017
Since fall 2016, OBP staff participated in an average of eight DE&I activities. Most staff members mentioned that they had rarely participated in DE&I events prior to this campus-wide DE&I initiative. Staff high participation is ample evidence on our enhanced awareness and interest on DE&I issues.

3) Equitable and Inclusive Climate

Ninety-one percent of OBP staff participated in the all-staff climate survey in Spring 2017. This high response rate indicates our support and commitment to improving the campus climate. A progress tracking template has been developed for staff to evaluate progress on action items proposed for Year One. Staff were asked to record and update their participations in all engagement activities around DE&I. Through one on one interviews with the unit lead, staff assessed each action item and discussed progress on the plan implementation, actual or potential challenges that impacted the process, and lessons they learned over the entire implementation process. All inputs were gathered and utilized to refine/re-prioritize actions and generate new ideas for Year Two.

In addition, the lead promoted the availability of university programs and resources to help resolve concerns or challenges staff members have or anticipate around diversity, equity and inclusion. OBP developed an internal protocol for staff to voice their concerns or challenges they have related to DE&I. All relevant information is available in a designated location of OBP shared server for staff members to easily retrieve.

4) Service

As a DE&I research unit, we are committed to providing data support and analyses for the university community and increasing awareness through our delivery of data and information related to DE&I. Over the past year, we have established a reporting standard for race/ethnicity including the definition of Under-Represented Minority (URM) and parameters to consider when reporting a trend for the university, which we have shared with other campus partners. In
collaboration with Information Quest-ITS, we have developed the University Metrics, Michigan
Metrics (metrics.umich.edu) and other on-line resources. We ensure these university resources
contain DE&I messages through meaningful subgroup analyses and help us track progress on
demographic diversity within the university. We are also participating in the U-M DE&I metrics
working group convened by the Office of Diversity, Equity and Inclusion (ODEI). Through our
participation, we promote the availability of our diversity data and coordinate efforts with other
key offices (e.g. OEM and HRIS) to define/refine the DE&I metrics for tracking and develop the
data delivery process/system.

Many OBP reports permit constituents to see the differences across subgroups that may
help them address diversity issues. However, we also identified analyses that did not contain
diversity information, which has been updated over the past year, if such data would be useful.
For instance, prior to Fall 2016, undergraduate time-to-degree data did not include race/ethnicity,
gender or first generation status. After data cleaning and manipulation process, we merged nine
years of graduate cohorts with demographic diversity information. Part of the analysis using the
merged data was presented at the DE&I lead group meeting in November 2016. We are also
being more intentional about using our student survey data to help answer research questions
related to DE&I.

The OBP website provides a variety of reports useful to both internal and external users.
A key component of our website is the new page we have added under “Facts and Figures”,
entitled “Diversity, Equity & Inclusion Data Resources.” This provides a listing of OBP-
maintained reports and analyses that provide DE&I data. This page also links to the Diversity
chapter of the Michigan Almanac and to the Ann Arbor Campus Snapshot Infographic, which we
first produced in Fall 2016. From September 2016 to July 2017, our Diversity page
(http://obp.umich.edu/root/facts-figures/diversity/) was viewed 922 times by 739 individuals. Our
DE&I Strategic plan was downloaded 86 times and DE&I related reports were downloaded 441
times during this period of time. This statistic will be used as the baseline information on the
utilization of our online resources. We will continue to measure the number of page visits or
downloads of DE&I-related web pages and reports to track how widely our DE&I resources are
used.

In spring 2016, OBP websites were evaluated and discussed improvements to the ADA
compliant sites. The website and online resources as currently configured provide good
accessibility, and some additional improvements were recommended. We have since
implemented improvements per recommendations.

IV. Strategic Objectives, Measures of Success and Action Plans*

The Office of Budget and Planning strategic objectives, planned activities, and measures
of success have been aggregated into the University’s four domains. Each of these strategic
objectives is accompanied by success measures that will be tracked over time. For additional
detail on assignments and accountabilities, see Section VI.

A. Recruitment, Retention and Development

As of July 2017, the OBP staff of twelve is 17% minority (one African American, one
Asian American, and ten White Americans) and 58% women (seven women and five men).
OBP staff FTE has been stable over the past decade. When a vacancy occurs, attention will be
given to attract a diverse candidate pool as our job posting policy suggests.

In spring 2016, the Institutional Research (IR) team hired a graduate student research
intern, with assistance of the Center for the Study of Higher and Postsecondary Education
(CSHPE) Internship Program. This internship opportunity had been posted to the entire admitted/first-year students in the CSHPE Master’s Program. We assume our participation in this internship program to be another opportunity to bring diversity to the staff. This intern worked closely with IR team in various projects including DE&I related tasks and assignments.

In addition, OBP strives to provide a working environment that promotes equity and inclusion for incumbent staff. As part of this endeavor, OBP recognizes that staff need professional development opportunities to keep current with the changing work environment.

Five-Year Strategic Objective 1.
Attract a diverse staff in accordance with U-M Central Human Resources Diversity Recruitment Initiative.

Measures of Success:
Makeup of the applicant/candidate pool(s) for future position(s) (i.e. # minority applicants/candidates).

FY18 Actions

1. Working in cooperation with central HR, we will assure our future open positions are posted with groups that represent diverse population.
2. Include messaging on the importance of DE&I in open position posting.
3. Our job description for internship position highlights our mission and commitment in delivering DE&I related information, research and analysis to the University community. We also stress that this intern will assist in DE&I-related projects.

Primary DE & I Goal: Diversity
Other applicable domain: Promoting an equitable and inclusive community.

Five-Year Strategic Objective 2.
Commit to supporting high quality professional development and learning opportunities to enhance performance and career growth of staff.

Measures of Success:
1. Staff participation in training programs or professional development opportunities on campus or outside the university.
2. Professional development plans for each staff member.

FY18 Actions
A. Conduct a review of professional development opportunities and learning opportunities that staff have participated in over the past year, and check to make sure that participation and opportunities have been equitable.
B. Communicate OBP office policy on professional development and learning opportunities to staff
C. Establish professional development plans for each staff member.

Primary DE & I Goal: Equity
B. Education and Scholarship

Five-Year Strategic Objective 1
Create systematic educational opportunities for staff regarding DE&I concerns in the workplace and within the university community at large.

Measures of Success
1. Enhanced knowledge and understanding about DE&I issues.
2. The generation and implementation of new ideas for supporting DE&I through discussion at staff meetings.
3. Staff participation in any DE&I related events or engagement activities.

FY18 Actions
A. Catalog campus resources, articles and research
B. Identify, post and encourage staff participation in campus-wide opportunities (i.e. MLK day event, cultural/arts appreciation day, story-time, discussion forum) designed to cultivate diversity-related skills.
C. Invite (a) guest speaker(s) to discuss DE&I issues or arrange a DE&I training session.
D. Use of staff meetings to provide consistent opportunities for dialogue, training and activities.

Primary DE&I Goal: Diversity, Equity & Inclusion
Other applicable domain: Promoting an equitable and inclusive community.

C. Promoting an Equitable and Inclusive Community

Five-Year Strategic Objective 1
Continue and deepen staff’s engagement with regard to refining, evaluating and prioritizing actions and strategies for OBP DE&I plans.

Measures of Success
1. Number of ideas/suggestions for plan updates and revision for FY19 onward

FY18 Actions
A. Develop processes and mechanisms to engage staff in the planning process.

Primary DE&I Goal: Equity & Inclusion
Other applicable domain: Education

Five-Year Strategic Objective 2
Commit to fostering a more inclusive and equitable environment in OBP

Measures of Success
1. Ideas shared with staff on how to include activities in their normal work that promote an equitable and inclusive community.
2. Evidence of protocol for staff members to voice their concerns or challenges they have or anticipate related to DE&I.
3. Documented procedures and resources to help resolve concerns from staff members.

FY18 Actions
A. Facilitate an informal/ or formal channel for staff members to express areas of concerns or challenges that they are having or anticipate.
B. Ensure that everyone knows administrative processes that can be used to request help around diversity, equity & inclusion within OBP and beyond.
C. Every staff member in OBP will have a DE&I goal and actions in his/her goal statement.
D. Share the OBP Climate Survey result with staff, identify areas that can be improved, and discuss actions that can be taken to improve the areas.

Primary DE&I Goal: Equity & Inclusion
Other applicable domain: Education

D. Service

As evidenced in the Data and Analysis part of this planning document, OBP generates many reports and studies that may benefit the assessment process of units across campus.

In 2016, OBP piloted an express version of the Survey of Freshman Admits (SOFA), a research project the University undertakes every five years to better understand how incoming freshmen experience the college recruitment process. We produced several reports specifically investigating the admissions experience of low-income and URM admits. Based on our survey results, we also decided to administer the standard version of the Survey of Freshman Admits (SOFA) in the summer of 2017. Our office worked closely with the Office of Enrollment Management (OEM) to add several items gauging students’ perceptions of our campus climate. We expect to produce similar reports this year to help OEM better understand the unique experiences of URM and low-income students.

We also conducted the University of Michigan Asks You (UMAY) survey in FY17. We partnered with campus units to add new items to the survey. This project helps to broaden our understanding of the U-M undergraduate experience. Our office is partnering with several campus units on pilot projects that will use UMAY results to strengthen their assessment efforts. DE&I related items continue to be included in our analyses and reports. Our hope is that campus units will continue to use UMAY results to inform their work.

Five-Year Strategic Objective 1.

Expand the OBP inventory of reports/analyses related to DE&I issues that meet the needs of the University community

Measures of Success
1. Number of data inquiries, reports and analyses.

FY18 Actions.
A. Invest in statistical software or analytical tools that enable us to examine meaningful subgroup differences effectively and efficiently.

B. Ensure that everyone enters “Diversity”, “Equity” or “Inclusion” in a Keyword field within the OBP task management tracker when a request or task has a DE&I component, to help with tracking.

C. Regularly review DE&I related requests, and discuss issues such as whether to add the report to the website, start producing the report on a regular basis, share best practices with other units, do a breakdown by other DE&I categories, etc.

D. Explore ways that promote the availability of the data made available by the Institutional Research team.

E. Use staff participation at AAUDE (Association of American Universities Data Exchanges), AIR (Association of Institutional Research) and MI-AIR (Michigan Association for Institutional Research) conferences to glean ideas about other DE&I-related research on peer campuses. Catalog DE&I-related research and analysis presented at the conferences.

Primary DE&I Goal: Diversity, Equity and Inclusion
Other applicable domain: Education

Five-Year Strategic Objective 2
Improve accessibility of online resources

Measures of Success
1. Number of page visits or downloads of DE&I-related web pages and reports
2. Issues identified in the ADA review addressed

FY18 Actions
A. Conduct an accessibility (ADA) review of its website.
B. Explore ways that the OBP website can best provide DE&I related data, and how OBP can support the University website.
C. Add any appropriate new reports and analyses to the resources listed under “Diversity, Equity & Inclusion Resources” on our website.

Primary DE&I Goal: Diversity, Equity and Inclusion
Other applicable domain: Promoting an equitable and inclusive community

V. Goal-related Metrics – unit measures tracked over time

Diversity
- Makeup of applicant/candidate pool(s).

Equity
- Number of participants in learning and professional development opportunities.
- Professional development plans for each staff member.
- ADA compliant sites

Inclusion
- Ideas/suggestions for plan updates & revision for FY18 onward.
Diversity, Equity & Inclusion
- Ideas shared on how to include activities in their normal work that promote a diverse/equitable/inclusive community.
- Staff Participations in Diversity, Equity, and Inclusion events and activities.
- DE&I-related data inquiries, reports and analyses.
- Page visits and downloads of DE&I-related information from the OBP website.

### VI. Action Planning Tables with Details and Accountabilities

#### A. Recruitment, Retention and Development

<table>
<thead>
<tr>
<th>Key Constituency</th>
<th>Strategic Objectives</th>
<th>Measures of Success</th>
<th>Detailed Actions Planned (measurable, specific)</th>
<th>Group/ persons accountable</th>
<th>Resources needed (if applicable)</th>
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</thead>
<tbody>
<tr>
<td>Staff in OBP</td>
<td>Attract a diverse staff</td>
<td>Makeup of applicant/candidate pool(s) for future position(s)</td>
<td>Working in cooperation with central HR, we will assure our future open positions are posted with groups that represent diverse population. Include messaging on the importance of DE&amp;I in open position posting. Job description for future intern will highlight our mission and commitment as DE&amp;I research unit, and stress that this intern will work closely with DE&amp;I related projects.</td>
<td>Director &amp; Associate Directors</td>
<td>N/A</td>
</tr>
<tr>
<td>Support learning/professional development opportunities</td>
<td>Staff participation in professional development &amp; learning opportunities</td>
<td>Review professional/learning opportunities that staff have participated over the past year. Communicate OBP policy on professional development to staff</td>
<td>Director &amp; Associate Directors</td>
<td>N/A</td>
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<td></td>
<td>Establish a professional development plan for each staff member</td>
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## B. Education and Scholarship

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</thead>
<tbody>
<tr>
<td>Staff in OBP</td>
<td>Create systematic educational opportunities for staff.</td>
<td>Enhanced knowledge and understanding about the DE&amp;I issues</td>
<td>Catalog campus resources, articles &amp; research.</td>
<td>Unit Lead</td>
<td>N/A</td>
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<td>Invite (a) guest speaker(s) to discuss DE&amp;I.</td>
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<td></td>
<td>New ideas for supporting DE&amp;I from discussion at staff meetings, which are then put into practice.</td>
<td>Director &amp; Associate Directors</td>
<td>N/A</td>
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<tr>
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<td>Use staff meetings for dialogue, training and activities</td>
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<td>Staff participation in DE&amp;I activities</td>
<td>Unit Lead</td>
<td>N/A</td>
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<td></td>
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<td></td>
<td>Identify, post and encourage staff participation in campus-wide opportunities (i.e. MLK event).</td>
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## C. Promoting an Equitable and Inclusive Community

<table>
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</thead>
<tbody>
<tr>
<td>Staff in OBP</td>
<td>Foster a more inclusive and equitable climate in OBP</td>
<td>Documented procedures/resources to help resolve concerns</td>
<td>Ensure that everyone knows administrative process that can be used to request help around diversity, equity &amp; inclusion within OBP and beyond.</td>
<td>Director &amp; Associate Directors</td>
<td>N/A</td>
</tr>
<tr>
<td></td>
<td>Protocol for staff members to voice their concerns or challenges they have or anticipate related to DE&amp;I.</td>
<td>Facilitate an informal/ or formal channel for staff members to express areas of concerns or challenges that they are having or anticipate.</td>
<td>Ideas shared with staff on how to include activities in their normal work that promote an equitable/inclusive community.</td>
<td>Every staff member in OBP will have a DE&amp;I goal and actions in his or her goal statement.</td>
<td>N/A</td>
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<tr>
<td></td>
<td>Ideas shared with staff on how to include activities in their normal work that promote an equitable/inclusive community.</td>
<td>Share the OBP Climate Survey result with staff, identify areas that can be improved, and discuss actions that can be taken to improve the areas.</td>
<td>Deepen staff engagement with regard to refining, evaluating &amp; prioritizing DE&amp;I actions and strategies.</td>
<td>Develop processes and mechanisms to engage staff in the planning process.</td>
<td>Unit Lead</td>
</tr>
<tr>
<td></td>
<td>Deepen staff engagement with regard to refining, evaluating &amp; prioritizing DE&amp;I actions and strategies.</td>
<td># ideas/suggestions for plan updates &amp; revision for FY19 onward.</td>
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<td></td>
<td>N/A</td>
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<tr>
<td>University community</td>
<td>Expand inventory of DEI reports and analyses.</td>
<td># data inquiries, reports &amp; analyses</td>
<td>Invest in statistical software or analytical tools that enable us to examine meaningful difference across subgroups. Ensure that everyone enters “Diversity”, “Equity” or “Inclusion” in a Keyword field within the OBP task management tracker when a request or task has a DE&amp;I component, to help with tracking. Regularly review DE&amp;I related requests, and discuss issues such as whether to add the report to the website, start producing the report on a regular basis, share best practices with other units, do a breakdown by other DE&amp;I categories, etc. Explore ways that promote the availability of the data made available by the IR team. Use our participation at conferences to glean ideas about other DE&amp;I related research on peer campuses, and discuss the feasibility of adapting them for our campus.</td>
<td>Associate Directors</td>
<td>N/A</td>
</tr>
<tr>
<td>Increase web accessibility</td>
<td># issues found in ADA review.</td>
<td>Conduct ADA review of our website.</td>
<td>Add any appropriate new reports and analyses to the resources listed under “Diversity, Equity &amp; Inclusion Resources” on our website.</td>
<td>Lee Katterman</td>
<td>N/A</td>
</tr>
</tbody>
</table>
VII. Plans for Supporting, Tracking and Updating the Strategic Plan

Sooyeon Kim (ksooyeon@umich.edu) is the key contact for stewardship of the OBP Diversity, Equity and Inclusion Strategic Plan in FY18. She will be assisted by the OBP Executive Director, Associate Director for University Budget, and Associate Director for Institutional Research in tracking and supporting the plan implementation.

This group will conduct a review of the plan in Fall 2017 and gather feedback and additional ideas to be implemented throughout the year. A midyear progress report will be presented to the OBP staff in Spring 2018, and a final evaluation of Year Two success measures, accomplishments against the plan as well as Year Three recommendations will be presented to OBP beginning in Summer 2018.