

**Diversity, Equity & Inclusion**  
**Strategic Plan**

Five-Year Strategic Objectives, Measures and FY 2021 Actions



July 24, 2020

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## I. Diversity, Equity and Inclusion Strategic Plan: Overview

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*“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.”*

- President Mark S. Schlissel

### **Goals: Diversity, Equity & 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 an administrative unit that 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 the Board of Regents, senior administrators, deans, directors, and budget administrators across campus. OBP works closely with other data providers across campus, including Human Resource Records and Information Services, 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 and 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 (DEI) initiatives. The office currently assists campus administrators and leadership to identify and support their DEI needs, such as through statistical reports on diversity of students, staff, and faculty.

## **II. Planning Process Used**

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Planning Lead(s): Madison Smith

Planning Team: Office of Budget and Planning

Planning Process Summary:

- collect data from several sources (e.g. Institutional data, forums, town halls, focus groups, interviews, surveys, committee reports)
- analyze data with an eye toward serving OBP goals and objectives
- generate engagement activity ideas
- present ideas to leadership and staff members for feedback and decisions

Several sources of input are tapped to plan future engagement. OBP staff activities in Year Four included the following:

- Organizational Development group reflection exercises
- Trotter Multicultural Center Tour
- Kelsey Museum of Archaeology Tour by Director Wilfong
- Supported Food Gatherers during the holiday season
- MLK Symposium OBP Viewing Party
- DE&I Virtual Engagement Activity Parts 1 and 2
- Cultivating a Culture of Respect training

In Year Four, the Planning Lead created an OBP DEI Resource Guide following requests from staff members to provide a wider range of opportunities that make it easier for participation given busy schedules. Staff members were provided a list of DE&I resources (e.g. webinars, LinkedIn Learning, podcasts, Ted Talks, reading materials, etc.) that included links to DEI resource lists across campus. OBP Staff continue to contribute to the guide by adding new opportunities. Additionally, we created an OBP Book Recommendations List on topics related to diversity, equity and inclusion.

During and after these activities, the OBP Planning Lead collected opinions and suggestions to use as potential future activities. In addition, OBP tracks the participation of individual staff members in DE&I activities and professional development offered by internal and external units in a spreadsheet.

OBP staff members report DEI participation and professional development activities annually as part of the performance review process. Each year, staff members include a DEI-related professional development goal and actions in their plan. These topics are discussed with supervisors during the annual review and goal-setting process meetings.

### **III. Data and Analysis: Key Findings**

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#### **A. Recruitment, Retention and Development**

In the previous fiscal year, the Office of Budget and Planning filled two vacant positions on the Institutional Research team. Per unit policy, the job postings included previously revised DEI language and were posted in areas where OBP and Human Resources believed would represent diverse populations with the objective of attracting qualified candidates from diverse backgrounds. Similar to prior experiences, this effort appeared to have a small effect on the diversity of our applicant/candidate pools for these positions. The Office of Budget and Planning remains committed to pursuing greater diversity in applicants and candidates.

As of July 2020, the Office of Budget and Planning is fully staffed with 12 team members. In the last five years, OBP has continued to employ 11-12 staff members that consisted of 50.0% to 58.3% women.

OBP strives to provide a working environment that promotes equity and inclusion for all staff members. As part of this endeavor, OBP leadership (Executive Director and Associate Directors) recognizes that professional development opportunities are essential for staff members to stay up to date with the changing work environment and individual job requirements. Furthermore, all annual reviews include inquiries about professional development and any hurdles or challenges faced that may have affected these opportunities.

During Year 4, OBP dealt with the uncertainty surrounding the COVID-19 pandemic. Most DEI events and professional development opportunities were cancelled, while the remaining were postponed or provided in a virtual setting. As a unit, OBP elected to postpone a few of our spring activities and in their place we offered a two-part virtual activity to engage staff members.

#### **B. Education and Scholarship**

The OBP Planning Lead takes responsibility for sharing updates on DEI-related events, resources, news articles, and research reports, which are primarily shared through email, at all

staff meetings or on the OBP DEI Resource Guide. All of these opportunities are cataloged on the unit's shared server for continuing reference. The Planning Lead also promotes DEI opportunities through information channels, such as lunch conversations or casual check-ins.

Participation in DEI activities and events by OBP staff members are recorded in a tracking spreadsheet. This spreadsheet is a useful reference tool for staff members and leadership during annual performance reviews. Over the past year, OBP staff members participated in over one dozen different DEI activities, both internal and external to the University of Michigan. Overall, staff members have provided positive commentary about their involvement and feel that their participation in events and activities have increased their awareness, interest, and understanding of DEI issues on campus.

As noted above, staff members have expressed concern that their work schedules are a hurdle to attend campus activities and events. As alternatives, OBP staff members sought out evening events, as well as online resources that could be pursued when time permitted. During Year 4, the Planning Lead created the OBP DEI Resource Guide to offer more individual and/or group DEI opportunities to OBP staff members with greater scheduling flexibility.

### **C. Promoting an Equitable and Inclusive Community**

The Office of Budget and Planning leadership team drafted and has shared a protocol for OBP staff to request DEI-related assistance. In a related effort, the Planning Lead has published, to the unit's server, a catalog of existing University resources available to staff in the event of an unlawful bias incident. At the beginning of FY20, the Compliance Hotline posters in office common areas were replaced with the newly designed Ethics, Integrity & Compliance posters. Additionally, notices for campus-wide programs, such as Consultation and Mediation Services for Faculty and Staff, have been posted for all staff to see.

During the summer of 2018, OBP leadership reviewed the findings of the unit's staff climate survey. In October 2018, the Executive Director and Planning Lead shared a presentation on the findings to all staff and discussed the implications of the survey results, which led to a discussion on possible actions the unit may undertake in the future.

### **D. Service**

The Office of Budget and Planning is in a position to provide data support and analyses for the University community and in this way can assist with DEI understanding and awareness. Many OBP reports permit constituents to see the differences across subgroups that may be enlightening. In addition, OBP has been able to provide data to answer specific questions from ODEI and other units.

The Office of Budget and Planning website has two diversity pages: "[DEI @ OBP](#)" and "[Diversity, Equity & Inclusion Data Resources](#)". OBP posts many reports useful to both internal and external users with DEI-related interests. "DEI & OBP" describes the Office of Budget and

Planning’s commitment to continuously improve diversity, equity and inclusion within our unit and to support campus DEI efforts in any way possible. The “Diversity, Equity & Inclusion Data Resources” page provides links to standard reports prepared by OBP with DEI data. The table below lists statistics for the number of page views and/or report downloads for the following: OBP Diversity page views, DEI-related report downloads, OBP DEI Strategic Plan downloads, and links clicked to other U-M DEI-related pages.

	FY 2017	FY 2018	FY 2019	FY 2020	Total
OBP Diversity Page Views	922	622	1,083	2,583	5,210
DEI-Related Report Downloads	441	463	555	N/A	1,459*
OBP DEI Strategic Plan Downloads	86	88	87	N/A	183*
Links clicked to other U-M DEI-related pages	-	30	59	N/A	89*

*\*Data not available in FY20 due to change in download tracking.*

Another data resource of value to the university is a collection of dashboards – University Metrics and Michigan Metrics – developed and maintained in a collaboration between OBP and Information Quest (IQ) of ITS. Over the past two years, OBP was involved in developing a dashboard specifically for the Office of Diversity, Equity & Inclusion’s needs. The project was completed, and a process has been established for updating the dashboard on a regular basis.

The OBP website was redesigned during the second half of FY19. As part of the redesign, the site design followed ADA compliance in order to continue to meet accessibility standards.

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

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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.

*\*All strategic objectives and related actions will be pursued in accordance with the State and Federal law and University policy.*

##### **A. Recruitment, Retention and Development**

###### 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. the number of minority applicants/candidates).

FY21 Actions:

- Working in cooperation with central HR, we will assure that all open positions are posted widely
- Include language stressing the important of DEI in open position posts

Primary DEI 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:

- Staff participation in training programs or professional development opportunities on campus or outside the university
- Professional development plan established for each staff member

FY21 Actions:

- 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 as appropriate
- Communicate and/or update as needed the OBP policy on professional development and learning opportunities to staff
- Establish a professional development plan for each staff member

Primary DEI Goal: Equity

Other applicable domain: Promoting an Equitable and Inclusive Community

## **B. Education and Scholarship**

### Five-Year Strategic Objective #1

Create systematic educational opportunities for staff regarding DEI concerns in the workplace and within the university community at large.

Measures of Success:

- Enhanced knowledge and understanding about DEI issues, with special attention to sexual harassment and misconduct prevention

- The generation and implementation of new ideas for supporting DEI
- Staff participation in any DEI-related events or engagement activities

FY21 Actions:

- Continue to populate the catalog of campus resources, articles and research for OBP staff members
- 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
- Invite guest speakers to discuss DEI issues (including sexual harassment and misconduct prevention), arrange for DEI training sessions, or organize opportunities for OBP staff members to watch DEI video presentations as a group
- Use staff meetings to provide consistent opportunities for dialogue, training and activities
- Connect with other small units for joint trainings and events, sharing resources and mutual support

Primary DEI Goal: Diversity, Equity & Inclusion

Other applicable domain: Promoting an Equitable and Inclusive Community

Five-Year Strategic Objective #2

Educate our community on sexual and gender-based misconduct prevention in an effort to promote a safe and supportive environment for all members to work, learn, and thrive.

Measures of Success:

- Staff participation in trainings and resources developed around the “umbrella policy”

FY21 Actions:

- Support central efforts to educate faculty, staff, and students on the forthcoming University of Michigan Policy on Sexual and Gender-Based Misconduct Prevention (“umbrella policy”)
- Develop and socialize unit-specific value statements that align and reinforce the forthcoming university level values that promote culture and climate change consistent with both the Diversity, Equity & Inclusion, and Sexual and Gender-Based Misconduct Prevention work that is already underway

Primary DEI Goal: Equity

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 DEI plans.

Measures of Success:

- Contributions from OBP staff members of ideas and suggestions for unit plan updates

FY21 Actions:

- Offer ways to engage staff members in the planning process

Primary DEI Goal: Equity and Inclusion

Other applicable domain: Education and Scholarship

### Five-Year Strategic Objective #2

Commit to fostering a more inclusive and equitable environment in OBP.

Measures of Success:

- Ideas shared with staff on how to include activities in their normal work that promote an equitable and inclusive community
- Evidence of protocol for staff members to voice their concerns or challenges they have or anticipate related to DEI
- Documented procedures and resources to help resolve concerns from staff members

FY21 Actions:

- Remind staff members about the administrative processes that can be used to request help around diversity, equity and inclusion within OBP and other settings. Facilitate an informal channel for staff (i.e. confidential conversation with supervisor) within OBP to express areas of concerns or challenges that they are having or anticipate
- Every staff member in OBP has a DEI goal and actions in his/her goal statement

Primary DEI Goal: Equity and Inclusion

Other applicable domain: Education and Scholarship

## **D. Service**

### Five-Year Strategic Objective #1

Expand the OBP inventory of reports/analyses related to DEI issues that meet the needs of the University community.

Measures of Success:

- Number of data inquiries, reports and analyses

FY21 Actions:

- Review the need for additional statistical software or analytical tools that would enable OBP staff to examine meaningful subgroup differences effectively and efficiently
- Remind staff members to add “Diversity”, “Equity” or “Inclusion” in the keyword field of the OBP task management system when a request or task has a DEI component to facilitate the unit’s evaluation of DEI-related work
- Periodically review DEI-related requests and discuss whether new reports can be added to the diversity section of the OBP website, whether there are data practices OBP can coordinate with other units, develop standards/common definitions to help guide campus DEI-related analyses, etc.
- Identify ways to promote the availability of the data made available by the Institutional Research team
- Use staff participation at AAUDE (Association of American Universities Data Exchanges), AIR (Association of Institutional Research) or MI-AIR (Michigan Association for Institutional Research) conference to glean ideas about other DEI-related research on peer campuses. Catalog DEI-related research and analysis presented at the conferences

Primary DEI Goal: Diversity, Equity & Inclusion

Other applicable domain: Education and Scholarship

### Five-Year Strategic Objective #2

Improve availability and accessibility of online resources.

Measures of Success:

- Include ADA review of any new resources added to OBP website

FY21 Actions:

- Conduct ADA review of our website
- Explore ways that the OBP website can best provide DEI-related data, and how OBP can support the University website
- Add new reports and analyses or/and update current inventory under “[Diversity, Equity & Inclusion Data Resources](#)” on the OBP website

Primary DEI Goal: Diversity, Equity & Inclusion

Other applicable domain: Promoting an Equitable and Inclusive Community

## V. Goal-related Metrics

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### Diversity:

- Makeup of applicant/candidate pool(s)
- Demographic Composition:
  - o Headcount
  - o Race/ethnicity
  - o Sex
  - o Age (generation cohort)

### 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 and revision for FY21 onward

### Climate Survey Indicators (tracked centrally)

- Satisfaction with unit climate/environment in work unit
- Assessment of semantic aspects of the general climate in work unit
- Assessment of semantic aspects of the DEI climate in work unit
- Feeling valued in work unit
- Feeling of belongingness in work unit
- Assessment of work unit commitment to diversity, equity, and inclusion
- Perceptions of equal opportunity for success in work unit
- Feeling able to perform up to full potential in work unit
- Feelings of professional growth in work unit
- Feelings of discrimination in past 12 months in work unit

### Diversity, Equity & Inclusion

- Ideas shared on how to include activities in their normal work that promote a diverse/equitable/inclusive community
- Staff participation in Diversity, Equity, and Inclusion events and activities
- DEI-related data inquiries, reports and analyses
- Page visits and downloads of DEI-related information from the OBP website

## VI. Action Planning Tables with Details and Accountabilities

### A. Recruitment, Retention and Development

Key Constituency	Strategic Objectives	Measures of Success	Detailed Actions Planned (measurable, specific)	Group/Persons Accountable	Resources Needed (if applicable)
OBP Staff Members	Attract a diverse staff	Makeup of applicant/candidate pool(s) for future position(s)	<ul style="list-style-type: none"> <li>Working in cooperation with central HR, we will assure our future open positions are posted widely</li> <li>Include messaging on the importance of DEI in open position posting</li> </ul>	<ul style="list-style-type: none"> <li>Executive Director</li> <li>Associate Directors</li> </ul>	N/A
	Support professional development/learning opportunities	Staff participation in professional development and learning opportunities	<ul style="list-style-type: none"> <li>Review professional/learning opportunities that staff have participated in over the past year.</li> <li>Communicate as needed the OBP policy on professional development and learning opportunities</li> </ul>	<ul style="list-style-type: none"> <li>Executive Director</li> <li>Associate Directors</li> </ul>	N/A
		Professional development plan for each staff member	<ul style="list-style-type: none"> <li>Establish a professional development plan for each staff member</li> </ul>	<ul style="list-style-type: none"> <li>Executive Director</li> <li>Associate Directors</li> </ul>	N/A

B. Education and Scholarship

Key Constituency	Strategic Objectives	Measures of Success	Detailed Actions Planned (measurable, specific)	Group/Persons Accountable	Resources Needed (if applicable)
OBP Staff Members	Create systematic educational opportunities for staff	Enhanced knowledge and understanding about the DEI issues	<ul style="list-style-type: none"> <li>Catalog campus resources, articles and research on DEI</li> <li>Guest speaker(s), training session(s), or video presentation(s)</li> </ul>	<ul style="list-style-type: none"> <li>Unit Lead</li> </ul>	N/A
		New ideas for supporting DEI	<ul style="list-style-type: none"> <li>Use staff meetings for DEI dialogue, training and activities</li> </ul>	<ul style="list-style-type: none"> <li>Executive Director</li> <li>Associate Directors</li> </ul>	N/A
		Staff participation in DEI events / activities	<ul style="list-style-type: none"> <li>Identify, post and encourage staff participation in campus-wide opportunities (i.e. MLK event)</li> <li>Connect with other small units for joint training / events, sharing resources and mutual support</li> </ul>	<ul style="list-style-type: none"> <li>Unit Lead</li> </ul>	N/A
OBP Staff Members	Educate our community on sexual and gender-based misconduct prevention in an effort to promote a safe and supportive environment for all members to work, learn, and thrive	Staff participation in trainings and resources developed around the “umbrella policy”	<ul style="list-style-type: none"> <li>Support central efforts to educate faculty, staff, and students on the forthcoming University of Michigan Policy on Sexual and Gender-Based Misconduct prevention (“umbrella policy”)</li> </ul>	<ul style="list-style-type: none"> <li>All OBP Staff</li> </ul>	N/A
			<ul style="list-style-type: none"> <li>Develop and socialize unit-specific value statements that align and reinforce the forthcoming university level values that promote culture and climate change consistent with both the Diversity, Equity &amp; Inclusion, and Sexual and Gender-Based Misconduct Prevention work that is already underway</li> </ul>	<ul style="list-style-type: none"> <li>Executive Director</li> <li>Associate Directors</li> </ul>	N/A

C. Promoting an Equitable and Inclusive Community

Key Constituency	Strategic Objectives	Measures of Success	Detailed Actions Planned (measurable, specific)	Group/Persons Accountable	Resources Needed (if applicable)
OBP Staff Members	Foster a more inclusive and equitable climate in OBP	Documented procedures and resources to help resolve concerns	<ul style="list-style-type: none"> <li>Ensure that everyone knows administrative processes that can be used to request help around DEI within OBP and beyond</li> </ul>	<ul style="list-style-type: none"> <li>Executive Director</li> <li>Associate Directors</li> </ul>	N/A
		Protocol for staff members to voice their concerns or challenges they have or anticipate related to DEI	<ul style="list-style-type: none"> <li>Facilitate an informal channel for staff members to express areas of concerns or challenges that they are having or anticipate</li> </ul>		
		Ideas shared with staff on how to include activities in their normal work that promotes an equitable/inclusive community	<ul style="list-style-type: none"> <li>Every staff member in OBP will have a DEI goal and actions in his or her goal statement</li> </ul>	<ul style="list-style-type: none"> <li>Executive Director</li> <li>Associate Directors</li> </ul>	
	Deepen staff engagement with regard to refining, evaluating and prioritizing DEI actions and strategies	Number of ideas / suggestions for plan updates and revision for FY21 onward	<ul style="list-style-type: none"> <li>Develop processes and mechanisms to engage staff in the planning process</li> </ul>	<ul style="list-style-type: none"> <li>Unit Lead</li> </ul>	N/A

D. Service

Key Constituency	Strategic Objectives	Measures of Success	Detailed Actions Planned (measurable, specific)	Group/Persons Accountable	Resources Needed (if applicable)
University Community	Expand inventory of DEI reports and analyses	Counts of data inquiries, reports, and analyses	<ul style="list-style-type: none"> <li>Invest in statistical software or analytical tools that enable us to examine meaningful differences across subgroups</li> </ul>	<ul style="list-style-type: none"> <li>Executive Director</li> </ul>	Analytical Tools / Statistical Software
			<ul style="list-style-type: none"> <li>Ensure that everyone enters “Diversity”, “Equity” or “Inclusion” in a keyword fields within the OBP task management tracker when a request or task has a DEI component to help with tracking</li> </ul>	<ul style="list-style-type: none"> <li>Associate Directors</li> </ul>	N/A
			<ul style="list-style-type: none"> <li>Periodically review DEI-related requests, and discuss issues such as whether to add the report to the website, start producing the report, share best practices with other units, do a breakdown by other DEI categories, etc.</li> <li>Identify ways that promote the availability of the data made available by the IR team</li> <li>Use participation at conferences to glean ideas about other DEI-related research on peer campuses and discuss the feasibility of adapting them for our campus</li> </ul>	<ul style="list-style-type: none"> <li>Associate Director for Institutional Research</li> </ul>	N/A

D. Service (continued)

Key Constituency	Strategic Objectives	Measures of Success	Detailed Actions Planned (measurable, specific)	Group/Persons Accountable	Resources Needed (if applicable)
University Community	Improve availability and accessibility of online resources	Counts of issues identified in ADA review	<ul style="list-style-type: none"> <li>• Conduct ADA review of our website</li> </ul>	<ul style="list-style-type: none"> <li>• Lee Katterman</li> </ul>	N/A
		Counts of page visits and downloads	<ul style="list-style-type: none"> <li>• Explore ways that the OBP website can best provide DEI-related data and how OBP can support the University website</li> <li>• Add any appropriate new reports and analyses or update current inventory under “Diversity, Equity &amp; Inclusion Data Resources” on our website</li> </ul>	<ul style="list-style-type: none"> <li>• Associate Director for Institutional Research</li> </ul>	N/A

## **VII. Plans for Supporting, Tracking and Updating the Strategic Plan**

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Madison Smith ([msmithk@umich.edu](mailto:msmithk@umich.edu)) is the Unit Lead and key contact for stewardship of the Office of Budget and Planning Diversity, Equity & Inclusion Strategic Plan in FY21. She will be assisted by the OBP Executive Director and Associate Directors in supporting the plan tracking and implementation.

This group will conduct a review of the plan in fall 2020 and gather feedback and additional ideas to be implemented throughout the year. A mid-year progress report will be presented to the OBP staff in spring 2021, and a final evaluation of Year Five success measures, accomplishments against the plan as well as future recommendations will be presented to OBP Leadership beginning in summer 2021.