

## Office of Budget & Planning

Diversity, Equity and Inclusion Strategic Plan | FY 2025

### Strategic Plan Overview

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#### Selected text from President's Diversity, Equity & Inclusion Charge:

*"At the University of Michigan, our dedication to academic excellence for the public good is inseparable from our commitment to diversity, equity, and inclusion. It is central to our mission as an educational institution to ensure that each member of our community has full opportunity to thrive in our environment, for we believe that diversity is key to individual flourishing, educational excellence and the advancement of knowledge."*

- Excerpt from the President's Charge

#### 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 of the Office of Budget & Planning]:**

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. The OBP staff is composed of budget analysts, business intelligence analysts, institutional researchers and support staff.

OBP provides high-quality and comprehensive support for the informed decision-making, policy creation, and planning necessary for effective allocation of campus resources. As the University's central planning and institutional research unit, OBP actively partners with campus leadership in guiding strategic resource allocation and development, fostering new initiatives, and supporting dynamic decision-making.

OBP is committed to enhancing the knowledge and understanding of activity on our campus through data gathering, research, analysis and reporting. 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.

### **Our Responsibilities:**

- Reports to the Office of the Provost serving as primary manager of the University Budget Model, budget preparation process, and budget allocations to Ann Arbor campus units.
- Provides analyses to support and enhance university decision-making, planning, and policy formation.
- Develops analytical reports and dashboards that track important trends for the university and its schools and colleges.
- Provides information about the university to internal and external audiences in a consistent and timely manner.
- Collaborates with campus partners and participates in data governance in order to build and document a common understanding of data used in decision-making.
- Manages the university approval process for academic programs (which includes coordination with other Michigan institutions through the Michigan Association of State Universities, or MASU) and student fees for the Office of the Provost.
- Produces mandated State and Federal reports.

### **Our Values:**

- Support and implement the goals set forth by the Board of Regents, President, and Provost.
- Research, acquire, analyze, and share knowledge.

- Ethically manage financial, student, and human resource data entrusted to the university.
- Foster an environment where growth, renewal, and appropriate risk-taking are supported.
- Maintain grace and professionalism in relationships with campus and external partners.

### **Key Strategies & Constituencies\*:**

The Office of Budget and Planning staff members are the main constituency of this plan. Except where specified, the plan pertains to all OBP staff. Our unit has identified strategic objectives and corresponding action items in three distal objectives as determined by the university: people, process and products. These distal objectives will guide our plan as we further support university-wide goals for DEI. All objectives and action items contain a set of metrics to track over time to determine completion status.

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

## **Planning Process Used**

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**Planning Lead(s):** Renee Reiff-Schramm and Madison Smith

**Planning Team:** Office of Budget and Planning

### **Implementation Highlights**

OBP staff activities in the past year included, but are not limited to:

- OBP All Staff Meetings: DEI is a standing agenda item during our monthly all staff meetings. Some of the topics from the year included, but are not limited to:
  - Campus-wide Events (Ex. DEI Summit and MLK Symposium)
  - Current Events (ex. Harvard/UNC Supreme Court Ruling)
  - Organizational Learning Culture Change Initiative
  - Organizational Learning DEI Courses
  - DEI 2.0 Plan (university- and unit- specific)
  - Advertised DEI Alive Events hosted by the Provost's Office
- PEAR Training: OBP staff engaged with Kaaren Williamsen at our retreat. She spoke about the following:
  - Overview of PEAR and what they offer
  - Creating a Culture Resistant to Sexual Harassment
  - Bystander Training
- Higher Education Research Lunch and Learn opportunities for OBP staff created and hosted by an OBP staff member: Topics often include a DEI component

- Launch of the OBP DEI newsletter for staff: Topics covered include events on campus, books, podcasts, articles (research or other), upcoming holidays and observances, etc.
- Various DEI-focused activities and professional development opportunities offered throughout the year on campus

### **Planning Process Summary:**

- Collect data from many sources including, but not limited to, institutional data, forums, town halls, focus groups, reports, surveys, interviews
- Create new ideas for engagement activities
- Present ideas to leadership and staff members for feedback and decisions
- Future engagement is planned through many sources.

OBP staff members report DEI-related professional development goals and participation in DEI-related events and activities along with their other professional development goals and activities annually as part of everyone's performance review process.

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

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### **Summary of Data, Key Findings, Themes and Recommendations:**

#### **A. People**

As of July 1, 2024, the Office of Budget and Planning's regular staff included 15 team members, of whom 67% are female and 33% are male. Prior to our recent increase in headcount, we regularly employed 11-12 staff members with the addition of a student employee in various years. In our most recent hires, we worked with the Talent Acquisition Team to have a greater effect on the diversity of our applicant pool. We will continue to use their expertise as we remain committed to pursuing greater diversity in applicants and candidates.

We strive 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) recognize that professional development opportunities are essential for staff members to stay up to date with the evolving work environment and individual job requirements. Furthermore, all annual reviews include inquiries about DEI opportunities, professional development and any hurdles or challenges faced that may have affected these opportunities.

## B. Process

We strive to educate our staff to create a more inclusive and equitable climate. To accomplish this, we hosted a summer DEI retreat to discuss future planning for DEI 2.0. The retreat included a presentation on the following:

- Review of DEI Climate Survey Findings
- Summary of DEI 1.0 Activity
- Review of DEI 2.0 Planning Year Timeline
- DEI 2.0 Brainstorming Activity
- Office Goals and Priorities for the Year

We continue to collect data that has and will guide the past, present and future plans.

In addition, the DEI Leads take responsibility for sharing updates and resources, primarily through email and staff meetings, to encourage further participation and ideas for educational opportunities.

## C. Products

We strive to enhance the overall knowledge of faculty, staff, students, regarding budget, finance, student success and other important activities of the University of Michigan-Ann Arbor. We work 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 U-M community, peer institutions, state and national government, current and prospective students, media and the general public.

Throughout the annual budget process, we work with all academic and central units to allocate financial and human resources to support and enhance diversity, equity and inclusion.

We provide information for decision-making in a variety of ways to reach diverse audiences. Key products are the office website, leadership reports, and through a plethora of Tableau dashboards. As an example, we, the Office of Budget and Planning are responsible for maintaining the Michigan Metrics Dashboards.

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

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### Introduction:

The Office of Budget & Planning plan covers staff. The strategic objectives needed to further the university-wide goals of diversity, equity and inclusion have been aggregated into three distal objectives determined by the University. Each of these strategic objectives is accompanied by metrics that will be tracked over time, as well as descriptions of single and multiple year actions we will take to accomplish those objectives. For additional detail on assignments, timelines and accountabilities, see the Action Planning Table.

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

## PEOPLE (Recruit, Retain & Develop a Diverse Community)

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Strategies and action items for **People** are designed to bolster and extend the work of all units by introducing effective programs and procedures aimed at recruiting, retaining, and supporting a diverse campus community. DEI-related recruitment and retention efforts across campus reflect the varied needs and goals of specific units and groups.

### STAFF

#### Strategic Objective 1:

Evaluate and improve practices to attract, train and retain a broadly diverse staff in accordance with U-M Central Human Resources Diversity Recruitment Initiative.

**Constituencies:** Staff

#### Metrics:

- Makeup of the applicant/candidate pool(s) for future position(s) (e.g. the number of minority applicants/candidates)
- Number of total applicants
- Number of hiring committee members who took training prior to interviews and resume screening
- Initial score of job postings submitted to Datapeople
- Onboarding policy reviewed and updated for future hires

**Actions:**

- Engage with the Talent Acquisition Team and utilize additional resources to eliminate any job posting bias
- Continue to pilot a process to eliminate applicant identifiers in the first review of applicants
- Continue to incorporate interview questions surrounding applicant's DEI experience both professionally and in the context of volunteer service or community engagement
- Review and update the current onboarding policy to promote equity and retention
- Require all new staff, as part of the onboarding policy, attend one or more DEI trainings provided by the University and/or LinkedIn Learning within the first six months of employment

**Primary DEI Goal(s):** Diversity and Equity

**Strategic Objective 2:**

Promote high-quality professional development and learning opportunities to enhance performance, support career growth and encourage community building.

**Constituencies:** Staff

**Metrics:**

- Professional development plan established for each staff member
- Number of OBP DEI newsletters sent to staff members
- Number of hours spent on professional development activities
- Number of professional development opportunities attended
- Number of all staff gatherings held to promote community building
- Percentage of completion rate of activities

**Actions:**

- Continue to update and communicate the OBP policy on professional development and learning opportunities to staff as needed
- Enhance ongoing communications to staff regarding professional development opportunities
- Establish a professional development plan for each staff member by way of the formalized template in the performance evaluation system
- Review professional development 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

- Facilitate internal group learning opportunities to engage and strengthen our community

**Primary DEI Goal(s):** Equity and Inclusion

## **PROCESS (Create an Equitable and Inclusive Campus Climate)**

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Strategies and action items for **Process** are designed to support and strengthen the development of policies, procedures, and practices that create an inclusive and equitable campus climate and encourage a culture of belonging in which every member of our community can grow and thrive.

### **STAFF**

#### **Strategic Objective 1:**

Continue to provide opportunities to educate staff and work toward equitable solutions regarding DEI concerns in the workplace and within the university community at large.

**Constituencies:** Staff, All

#### **Metrics:**

- Enhanced knowledge and understanding about DEI concerns
- Staff participation in any DEI-related engagement activities
- Number of OBP DEI newsletters sent to staff members
- Evidence of protocol for staff members to voice their concerns or challenges
- Documented procedures and resources to help resolve concerns/issues brought forward by staff members

#### **Actions:**

- Continue to distribute a unit DEI newsletter to notify staff of opportunities and provide educational awareness where appropriate
- Promote new DEI topics in monthly all staff meetings
- Utilize available university resources to promote on-going DEI initiatives
- Interact with campus partners to educate staff on diversity, equity and inclusion research
- Remind staff members about the administrative processes that can be used to request help within OBP and other settings. Facilitate an informal channel for staff within OBP to use, when appropriate, to express areas of concerns or challenges that they are having or anticipate

**Primary DEI Goal(s):** Equity and Inclusion

**Strategic Objective 2:**

Continue to work toward a more inclusive and equitable climate in OBP where all staff flourish and feel welcome to contribute to the strategic vision.

**Constituencies:** Staff

**Metrics:**

- Generation and implementation of new ideas for supporting DEI in OBP and the university community
- Ideas communicated with staff on how to include activities in their normal work that promote an equitable and inclusive community
- Number of trainings held to promote inclusivity and belonging

**Actions:**

- Encourage new opportunities and ideas from all staff members
- Facilitate training with prompts to highlight how we can change behavior to incorporate DEI principles where they do not already exist
- Promote opportunities to enhance team bonding, inclusivity and belonging
- Foster an environment where growth, renewal, and appropriate risk-taking are supported
- Recognize, respect, and celebrate individual and collective differences and strengths

**Primary DEI Goal(s):** Equity and Inclusion

**PRODUCTS (Support Innovative and Inclusive Teaching, Research, and Service)**

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Strategies and action items for **Products** are designed to integrate DEI solutions into our educational program offerings and teaching methodology, and to ensure scholarly research on diversity, equity and inclusion, and the scholars who produce it, are valued and supported.

**STAFF**

**Strategic Objective 1:**

Expand and enhance accessibility of data for reporting, leadership analysis and equitable decision-making, and the needs of the university community.

**Constituencies:** All

**Metrics:**

- Number of data inquiries, reports and analyses
- Number of campus partners we collaborate with for data reporting

**Actions:**

- Partner with campus leadership in guiding strategic resource allocation to further DEI goals, fostering new initiatives, and supporting dynamic decision-making
- Research, acquire, analyze, and share knowledge to meet the needs of our constituents
- Continue to collaborate with campus partners to build and document a common understanding of data used in decision-making

**Primary DEI Goal(s):** Diversity, Equity and Inclusion

**Strategic Objective 2:**

Socialize and promote OBP data for reporting, leadership analysis and equitable decision-making, and the needs of the university community.

**Metrics:**

- Number of views on Michigan Metrics and Student Success dashboards
- Number of views on the Office of Budget and Planning website

**Constituencies:** All

**Actions:**

- Explore ways that we can enhance access to DEI-related data through our website, and how OBP can support data needs of the University community
- Continue to socialize Michigan Metrics and Student Success dashboards to campus partners
- Continue to promote the data made available by the Institutional Research team

**Primary DEI Goal(s):** Diversity, Equity and Inclusion

## Goal-related Metrics – Measures Tracked Over Time

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### Demographic Composition:

- Headcount
- Race/ethnicity
- Sex
- Age (Generation cohort)

### Climate Survey Indicators (sample indicators listed below):

- 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 on 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 work unit

### Additional Goal-related Metrics

- Makeup of the applicant/candidate pool(s) for future position(s) (e.g., the number of minority applicants/candidates)
- Number of total applicants
- Number of hiring committee members who took training prior to interviews and resume screening
- Initial score of job postings submitted to Datapeople
- Onboarding policy reviewed and updated for future hires
- Professional development plan established for each staff member
- Number of OBP DEI newsletters sent to staff members
- Number of hours spent on professional development activities
- Number of professional development opportunities attended
- Number of all staff gatherings held to promote community building
- Percentage of completion rate of activities
- Enhanced knowledge and understanding about DEI concerns
- Staff participation in any DEI-related engagement activities
- Evidence of protocol for staff members to voice their concerns or challenges

- Documented procedures and resources to help resolve concerns/issues brought forward by staff members
- Generation and implementation of new ideas for supporting DEI in OBP and the university community
- Ideas communicated with staff on how to include activities in their normal work that promote an equitable and inclusive community
- Number of trainings held to promote inclusivity and belonging
- Number of data inquiries, reports and analyses
- Number of campus partners we collaborate with for data reporting
- Number of views on Michigan Metrics and Student Success dashboards
- Number of views on the Office of Budget and Planning website

## Action Planning Tables with Details and Accountabilities

Fill in the tables with additional details about actions, including deliverables and assignments.

### PEOPLE (Recruitment, Retention & Development)

Key Constituency	Strategic Objective	Associated Metrics	Detailed Actions Plan (measurable, specific)	Group/person accountable
OBP Staff Members	Evaluate and improve practices to attract, train and retain a broadly diverse staff in accordance with U-M Central Human Resources Diversity Recruitment Initiative.	<p>Makeup of applicant / candidate pool(s) for future position(s) (e.g. the number of minority applicants / candidates)</p> <p>Number of total applicants</p> <p>Number of hiring committee members who took training prior to interviews and resume screening</p> <p>Initial score of job postings submitted to Datapeople</p> <p>Onboarding policy reviewed and updated for future hires</p>	<p>Engage with the Talent Acquisition Team and utilize additional resources to eliminate job posting bias</p> <p>Continue to pilot a process to eliminate applicant identifiers in the first review of applicants</p> <p>Continue to incorporate interview questions surrounding applicant's DEI experience both professionally and in the context of volunteer service or community engagement</p> <p>Review and update the current onboarding policy to promote equity and retention</p> <p>Require all new staff, as part of the onboarding policy, attend one or more DEI trainings provided by the University and/or LinkedIn Learning within the first six months of employment</p>	<p>Director</p> <p>Assoc. Directors</p> <p>Supervisor</p> <p>DEI Leads</p> <p>All OBP Staff</p>

**PEOPLE** *(Recruitment, Retention & Development) continued*

Key Constituency	Strategic Objective	Associated Metrics	Detailed Actions Plan (measurable, specific)	Group/person accountable
OBP Staff Members	Promote high-quality professional development and learning opportunities to enhance performance, support career growth and encourage community building.	<p>Professional development plan established for each staff member</p> <p>Number of OBP DEI newsletters sent to staff members</p> <p>Number of hours spent on professional development activities</p> <p>Number of professional development opportunities attended</p> <p>Number of all staff gatherings held to promote community building</p> <p>Percentage of completion rate of activities</p>	<p>Continue to update and communicate the OBP policy on professional development and learning opportunities to staff as needed</p> <p>Enhance ongoing communications to staff regarding professional development opportunities</p> <p>Establish a professional development plan for each staff member by way of the formalized template in the performance evaluation system</p> <p>Review professional development 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</p> <p>Facilitate internal group learning opportunities to engage and strengthen our community</p>	<p>Director</p> <p>Assoc. Directors</p> <p>Supervisor</p> <p>DEI Leads</p> <p>All OBP Staff</p>

**PROCESS** (*Promoting & Equitable & Inclusive Community*)

Key Constituency	Strategic Objective	Associated Metrics	Detailed Actions Plan (measurable, specific)	Group/person accountable
OBP Staff Members	Continue to provide opportunities to educate staff and work toward equitable solutions regarding DEI concerns in the workplace and within the university community at large.	<p>Enhanced knowledge and understanding about DEI concerns</p> <p>Staff participation in any DEI-related engagement activities</p> <p>Number of OBP DEI newsletters sent to staff members</p> <p>Evidence of protocol for staff members to voice their concerns or challenges</p> <p>Documented procedures and resources to help resolve concerns/issues brought forward by staff members</p>	<p>Continue to distribute a unit DEI newsletter to notify staff of opportunities and provide educational awareness where appropriate</p> <p>Promote new DEI topics in monthly all staff meetings</p> <p>Utilize available university resources to promote on-going DEI initiatives</p> <p>Interact with campus partners to educate staff on diversity, equity and inclusion research</p> <p>Remind staff members about the administrative processes that can be used to request help within OBP and other settings. Facilitate an informal channel for staff within OBP to use, when appropriate, to express areas of concerns or challenges that they are having or anticipate</p>	<p>Director</p> <p>Assoc. Directors</p> <p>Supervisor</p> <p>DEI Leads</p> <p>All OBP Staff</p>

**PROCESS** *(Promoting & Equitable & Inclusive Community) continued*

Key Constituency	Strategic Objective	Associated Metrics	Detailed Actions Plan (measurable, specific)	Group/person accountable
OBP Staff Members	Continue to work toward a more inclusive and equitable climate in OBP where all staff flourish and feel welcome to contribute to the strategic vision.	<p>Generation and implementation of new ideas for supporting DEI in OBP and the university community</p> <p>Ideas communicated with staff on how to include activities in their normal work that promote an equitable and inclusive community</p> <p>Number of trainings held to promote inclusivity and belonging</p>	<p>Encourage new opportunities and ideas from all staff members</p> <p>Facilitate training with prompts to highlight how we can change behavior to incorporate DEI principles where they do not already exist</p> <p>Promote opportunities to enhance team bonding, inclusivity and belonging</p> <p>Foster an environment where growth, renewal, and appropriate risk-taking are supported</p> <p>Recognize, respect, and celebrate individual and collective differences and strengths</p>	<p>Director</p> <p>Assoc. Directors</p> <p>DEI Leads</p>

**PRODUCTS** (*Education, Scholarship & Service*)

Key Constituency	Strategic Objective	Associated Metrics	Detailed Actions Plan (measurable, specific)	Group/person accountable
<p>OBP Staff Members</p> <p>Campus Partners</p>	<p>Expand and enhance accessibility of data for reporting, leadership analysis and equitable decision-making, and the needs of the university community.</p>	<p>Number of data inquiries, reports and analyses</p> <p>Number of campus partners we collaborated with for data reporting</p>	<p>Partner with campus leadership in guiding strategic resource allocation to further DEI goals, fostering new initiatives, and supporting dynamic decision-making</p> <p>Research, acquire, analyze, and share knowledge to meet the needs of our constituents</p> <p>Continue to collaborate with campus partners to build and document a common understanding of data used in decision-making</p>	<p>Director</p> <p>Assoc. Directors</p> <p>DEI Leads</p> <p>All OBP Staff</p>
<p>University Staff</p>	<p>Socialize and promote OBP data for reporting, leadership analysis and equitable decision-making, and the needs of the university community.</p>	<p>Number of views on Michigan Metrics and Student Success dashboards</p> <p>Number of views on the Office of Budget and Planning website</p>	<p>Explore ways that we can enhance access to DEI-related data through our website, and how OBP can support data needs of the University community</p> <p>Continue to socialize Michigan Metrics and Student Success dashboards to campus partners</p> <p>Continue to promote the data made available by the Institutional Research team</p>	<p>Director</p> <p>Assoc. Directors</p> <p>DEI Leads</p> <p>All OBP Staff</p>

## Plans for Supporting, Tracking and Updating the Strategic Plan

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Renee Reiff-Schramm and Madison Smith are the Unit Leads and key contacts for stewardship of the Office of Budget and Planning Diversity, Equity & Inclusion Strategic Plan in FY25. They will be assisted by the OBP Executive Director and Associate Directors in tracking and supporting the plan implementation.

This group will conduct a review of the plan in fall 2024 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 winter 2024/2025, and a final evaluation of success and accomplishments against the plan, as well as future recommendations will be presented to OBP Leadership beginning in spring 2025.