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

**Year Three Strategic Objectives, Measures**

**and FY19 Actions**

**I. Diversity, Equity & Inclusion Strategic Plan: Overview**

*Selected text from President’s Diversity 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.*

**Core Values of Academic Innovation (AI)** –

*To shape the future of****learning****and redefine****public residential education****at a 21st century research university by unlocking new opportunities and enabling* ***personalized, engaged, and lifelong learning****for the U-M community and learners around the world.*

*We intend to help create a climate of diversity, equity, and inclusion in order to improve organizational culture, recruitment/retention, and to advance our mission.*

*We strive to be an organization that not only celebrates diversity, but one that fosters success for students of all ages, academic, ethnic, and social backgrounds.*

*We know that with our outreach across campus, the community, and the world, we have the opportunity to change lives in significant ways by:*

* *Attracting diverse global learners to U-M through platform-based courses and offerings and, in so doing, advance diversity of U-M residential community. Increasing active participation of those who have been traditionally underserved and underrepresented in higher education. Increasing engagement with global learners representing the widest possible range of global perspectives.*
* *Leveraging experimentation with digital pedagogy and learning analytics to create more inclusive and universally accessible learning environments for the U-M community and global learners around the world.*
* *Increasing access to high quality educational opportunities and resources to the broadest possible range of learners.*
* *Attracting diverse faculty innovators to partner in the design and creation of new academic innovation initiatives.*
* *Partnering with external agencies and organizations to advance research and personalized learning experimentation that leads to improved learner preparation and increased participation, with particular attention to individuals from groups that have been traditionally underrepresented and underserved in higher education, including women, members of racial and ethnic groups, persons with disabilities, and persons with low socio-economic status.*

**II. Implementation Highlights and Planning Process Used**

Planning Lead(s) - Kathleen Bauer, Amy Homkes-Hayes, Reggie Plahta, and Camille Ulrich

*Note: The FY19 planning team for AI is Rachel Niemer\*, Cy Abdelnour, Robin Heitzman, Amy Homkes-Hayes, and Keesa Johnson Muhammad.* ***(\*****Lead)*

Planning Team – All AI staff

Planning Process Summary

* We held an all-staff meeting to review our climate survey and to brainstorm ideas to work on in FY19.
* The list of projects for FY19 was sent to staff with a request that each individual volunteer for one (or more) to work on.
* Each project group met, discussed goals, and set measures for success.

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

We again reviewed the most recent Human Capital Report (Employee Profile by Career Family) for our unit (attached) to compare to the last three reports. In addition, other measures were taken as below:

* We have learners from 195 UN recognized countries that have enrolled in our MOOCs
* 46,752 of our survey respondents perceive themselves as being below the median socio-economic level of society
* 15,401 survey respondents taking our courses are unemployed and looking for work
* 35,328 respondents expect to that the courses they’re taking will help them change jobs
* We have over 6,713,045 all time enrollments across our courses
* 1.04% survey respondents identify as alumni of U-M
* Average age of our learners is 31.6, with responses from 7-93 years old
* 15,283 respondents expect to perform better at work

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

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

**OVERVIEW**

As mentioned before, we believe AI has the opportunity to become an international leader in the areas of diversity, equity, & inclusion (DE&I) as it relates to educational opportunity and openness. With our worldwide reach, we can create materials that will put UM solidly in the forefront of change. (We are already leading the way with accessibility to our materials.) We imagine that other higher educational institutions will reach out to us asking to use our materials and we welcome the chance to share our knowledge.

Years one and two were spent hiring a number of new staff. New staff members are brought up-to-speed on DE&I as quickly as possible. We believe that we will have a proper footing after 2-3 years of operation to do another, unit-based, climate survey and will include that in our plan for this year.

We will follow UM's guidelines as stated in Standard Practice Guide 201.08 "Grievance Procedure and Dispute Resolution," if there are issues that need resolution.

**V. Goal-Related Metrics**

We will continue to collect data (metrics) on the composition of our staff, various climate survey indicators, as well as the analytics associated with our MOOC learners (see Section III above). In particular, the demographics we will track include

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

Key climate perception variables we will track include

* 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 work unit

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

See the Attached Appendix.

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

The Unit DE&I Lead(s) will:

* Hold regular check-in meetings with volunteers for the various tasks.
* Provide DE&I updates at all AI staff meetings.
* Gather data measures annually (see Section III above).
* Continue to update/adjust this report as needed, but no less than annually.
* Report on our successes and continue to work to improve our challenges.

Appendix

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| **DOMAIN** | **STRATEGIC OBJECTIVE/PROJECT** | **ACTION ITEMS** | **MEASURE(S) OF SUCCESS** | **TEAM/ACCOUNTABILITY** |
|  |  |  |  |  |
| Inclusive & Equitable Climate | Create a customized follow-up climate survey to collect updated data and to parse existing data more deeply. | Review climate survey as a team and identify potential areas for follow-up. Determine with AI senior leadership whether or not we can/want to partner with the proprietary survey company to re-administer the survey (Sound Rocket). Determine with AI senior leadership whether or not we should follow up on specific items that we identified in the previous survey as requiring further investigation. | Prepare draft recommendations for AI senior leadership and consult with AI senior leadership regarding appropriate next steps. Follow through on recommendations, if AI senior leadership agrees.  | Rebecca Quintana, Noni Korf, Amy Homkes-Hayes |
| Inclusive & Equitable Climate | Hold monthly community building efforts. | Plan, publish, and execute monthly community building events. | Publish a calendar of all events to raise awareness, plan ahead. | Jen Vetter, Kati Bauer, Michael Skib, Evan Straub, Trevor Parnell, Amy Homkes-Hayes, Carly Thanhouser, David Lawrence-Lupton |
| Meet quarterly to ensure next three months are planned. |
| Hold service events both internal and external to UM. |
| Inclusive & Equitable Climate | All In! (AI REM Week). | Promote an equitable and inclusive community environment within AI by ensuring that teams have time to focus on professional development, team building, and retooling/cleaning. | REM = Reflect, Energize, and Move-forward. Work with each AI team to determine the best time(s) and cadence for REM weeks. Communicate REM week structure and expectations to team. | Dave Malicke, Lauren Atkins, Camille Ulrich, Jen Vetter, Noni Korf, Alex Hancook, Elyse Aurbach |
| Develop best practices for AI REM weeks so that we can continue to run and improve the program. | Draft, discuss, and finalize a best practices document. |
| Establish boundaries/expectations about how much time should be devoted to team building and professional development versus how much time should be protected for individual work time. |
| Create a list of professional development opportunities that staff can consider. |
| Hold REM week(s). Refine. Repeat. |
| Inclusive & Equitable Climate | Create a framework to report inclusive/equitable climate issues at AI. | Provide anonymous and named mechanisms for people to report issues they feel or observe. | Research existing UM resources for this sort of reporting and create an inventory. | James Park, Mike Daniel, Tim O'Brien |
| Communicate these resources to staff. |
| Inclusive & Equitable Climate | Make our workplace(s) wheelchair accessible. | Evaluate and recommend improvements to accessibility of AI Office spaces. | Audit AI spaces for physical accessibility and identify potential adjustments needed. Outline solutions for adjustments including cost, available resources, etc. | Molly Maher, Michael Skib, Rachel Niemer |
| Increase disability awareness and comfort among staff so we create welcoming environments in our office and events for people with different abilities or needs. | Hold disability training session with UM ADA coordinator. |
| Collaborate with UM ADA coordinator to draft standard language and map resources that best enable people with different needs to feel welcome in our spaces. |
| Draft standard language and map resources. Include them in event materials, on AI website, and during interview sessions. |
| Create plan for emergency evacuation for staff/guests with disabilities. |
| Inclusive & Equitable Climate | Mental Health Initiative | Raise staff awareness of mental health for the benefit of each staff member, the office as a whole, the students we serve, and our portfolio of products/services. | Arrange for speakers/workshops to raise AI staff awareness of mental health and well-being for our students, staff, and users. Co-host well-being events for AI staff with the DE&I celebrations group. | Carly Thanhouser, Molly Maher, Holly Derry, Cait Holman, Elyse Aurbach, Trevor Parnell, Kati Bauer, Amy Homkes-Hayes |
| Consider ways items in our portfolio do or could relate to mental health. | Audit our tool design and content to ensure we are supporting student/learner well-being. Brainstorm ways our current tools or OLX could integrate mental health or could support further understanding of mental health (e.g. how can we interpret our data to learn about well-being, how can we bring in well-being where it doesn't currently exist?) |
| Inclusive & Equitable Climate | Celebrations Group | Make AI a better place to work (even though it’s already awesome) by celebrating various events and acknowledging performance in a semi-formal way. | Budget for team arranged. | Cait Holman, Trevor Parnell, Carly Thanhouser, Marissa Reid, Kati Bauer, Camille Ulrich, Dave Malicke, Jeffrey Bennett, Holly Derry, Lauren Budde |
| Print compliment cards for use by staff. |
| Create a card box with a variety of cards for events like: birthdays, weddings, new babies, sympathy, graduations, etc. that staff can use as needed. |
| Survey teammates and create word clouds for individuals celebrating work-aversaries at AI. |
| Track and celebrate special launches or releases of products/courses. |
| Celebrate reaching goal of 7,000,000 learners! |
| Innovative & Inclusive Scholarship/Teaching | Include DEI principles when guiding faculty during course or project design (continued from year 2). Evaluate how our current portfolio of MOOCs addresses DE&I topics, brainstorm ideas on how to create additional MOOCs with topics related to DE&I. Document when/where faculty are introduced to DE&I principles in the MOOC process. | Lead a team effort/workshop to review MOOCs according to rubric (i.e. topics addressed, diversity assessment examples). | Lead workshop. | Noni Korf, Keesa Johnson Muhammad, Rebecca Quintana, Dave Malicke, Benjamin Morse |
| Review personas in each course (aspirational and actual, how do they playout during the design process?) | Ensure learner personas used are aspirational and determine how they playout during designing. |
| Add Teach-Outs - we have more agency in choosing topics. | Choose at least 1 DE&I related Teach-Out in FY19. |
| Create an accessibility tag/disclaimer (be more transparent about which courses are accessible and which are not). | Create and begin to use the accessibility tag. |
| Draft a guidance checklist for faculty. Ask faculty to reflect on final course versus what DE&I goals were included in proposal. | Ensure faculty are sticking to their proposals with regard to DE&I. |
| Implement use of checklist for faculty. |
| Add MOOC survey question(s) about inclusion. | Add one or more questions to our MOOC survey in FY19. |
| Review courses for learner criticisms related to DE&I. | Review criticisms determine if corrections are feasible. |
| Create a visual representation of who our learners are (from all over the world). | Representation created and distributed. |
| Innovative & Inclusive Scholarship/Teaching | Be intentional about the communities we reach out to, including teachers and pre-college learners (continued from year 2). | Create a plan to intentionally reach out to defined communities. | Reach out to former committee members and determine the current status of prior work. | Benjamin Morse, Keesa Johnson, Monica Miklosovic,  |
| Identify a subset and prioritize efforts for measurable outcomes. | Define what we mean by "communities" and "intentional outreach". |
| Create a mechanism for documenting all forms of communication and interaction we have with our defined communities. | Create a plan for reaching out. |
| Brainstorm ideas/actions, develop measurable outcomes. | Mechanism defined and implemented in FY19. |
| Innovation & Inclusive Scholarship/Teaching | Showcase our staff members' professional and technical skills. | Complete a "staff skill survey", including skills not related to work. | Survey completed by mid-September. | Jeff Bennett, Trevor Parnell, Evan Straub |
| Identify organizations for outreach (check for overlap with other DE&I groups). Continue to explore existing opportunities. | Create list of organizations (be sure to include Girls who Code, Wolverine Pathways). |
| Hold first event, partnering with an existing event, if possible. | Identify partner group and hold event in December. |
| Hold second event. | Draft script, present draft to organizations, share with the recognizing service group. Complete the outreach, using the script, by May 2019. |
| Innovation & Inclusive Scholarship/Teaching | Share AI's impact throughout Michigan. | Identify what initiatives or projects are intentionally engaging the State of Michigan. | Gather stories. | Eric Joyce, Cait Holman |
| Develop a broader communications plan to demonstrate AI's impact throughout the State of Michigan. | Develop a visual understanding of how MOOC participants in Michigan are using our content. |
| Explore opportunities to engage with other institutions of higher education in Michigan. | Recruit team members from other institutions? |
| Recruitment & Retention | Provide recommendations to supervisors to have more regular check-ins with staff on overall development, wellness, and growth. | Research models for giving feedback and the benefits on receiving feedback. Investigate best practices for giving and receiving feedback. | Research the following topics: psychological safety, communication mechanisms, conflict styles, what makes good supervisors. | Michael Skib, Carly Thanhouser, Tim O'Brien, Amy Homkes-Hayes |
| Make recommendations for supervisors to provide feedback at regular intervals. | Gather feedback from AI staff and draft recommendations. |
| Work towards creating a "culture of communication and openness" in service of AI's values. | Request that one staff member (with a background in providing feedback) do a teach-back on this topic, with participants providing anonymous examples of giving and receiving feedback in AI. |
| Recruitment & Retention | Add DE&I process to onboarding and integrate DE&I-related questions into exit interviews. Create mechanisms for acculturating new staff to AI while finding ways for new staff to join our diversity efforts. | Ensure that new team members are informed of our DE&I initiative, understand how AI is involved, current efforts in AI, and how they can personally get involved (by joining an existing team or creating a new one). | By mid-September, have all three action items reached and ready to implement across AI. | Mike Daniel, Kati Bauer, Camille Ulrich |
| Review the exit interview questions and determine ow we would like to incorporate DE&I questions into the process. | Communicate updates to AI via OPS announcements. |
| Determine a process and cadence for gathering DE&I data from the exit interviews and sharing findings with the team using a method that retains the anonymity of the former employee. |
| Recruitment & Retention | Improve Office of Academic Innovation inclusive recruitment practices (in consultation with the Office of the General Counsel) with specific attention to women in technical roles, people of color, and/or those with disabilities (continued from year 2). | Continue to identify and implement additional recruitment practices. | The diversity of the AI staff will continue to grow with increased percentages of women and people of color applying to AI jobs. | Amy Homkes-Hayes, David Lawrence-Lupton, Ollie Saunders,  |
| Recruitment & Retention | Design personalized professional development opportunities for AI staff responsive to individual goals and in alignment with AI DE&I goals. Realize more continuity between professional development plans (continued from year 2). | Brainstorm and implement professional development opportunities for staff (trainings, workshops, etc.). Determine ways to share PD resources within AI intranet. Train supervisors on how to help their staff find and implement PD. Work with supervisors on ways to support and evaluate progress on PD goals including career progression within and beyond AI.  | The AI staff will have access to PD fostered by the AI community and responsive to staff wants and needs. AI supervisors will have the tools they need to help foster professional and career development amongst their staff.  | Amy Homkes-Hayes, Lauren Budde, David Lawrence-Lupton |
| Recruitment & Retention | Respond to "whole person" retention strategies finding ways to increase the flexibility and responsiveness of AI to staff differences and promotion structures (continued from year 2). | Create job pathways and collect job descriptions for each job within AI so that staff know what their next career steps are to move up the path. | All job descriptions for staff are collected and made centrally available. | Mike Daniel, Dave Malicke, Camille Ulrich |
| Respond to "whole person" retention strategies finding ways to increase the flexibility and responsiveness of AI to staff differences and promotion structures (continued from year 2). | Investigate promotion structures and ways for AI staff to remain in AI in different roles. Explore ways to help build a network any or all AI staff may take advantage of for promotion and new positions (in or outside of UM). | Complete investigation and make draft suggestions to accomplish this action item. | Amy Homkes-Hayes, Robin Heitzman, Lauren Budde |
| Examine work-life integration methods and practices that support wellness. | Include some of these methods in monthly DE&I sessions. |
| Use results from AI climate survey to determine interventions to improve climate, influencing retention. | Staff is more satisfied and remains at AI for longer periods. |
| Determine ways to help AI staff build and stay connected to UM (e.g. visiting other places on UM campus). | Set up monthly or quarterly "trips" to explore other areas of campus. |
| Promote and fulfill flexible workplace practices responsive to the diversity of AI staff while not mitigating the quality and quantity of AI work. | New practices are initiated and are determined to be of value. |
| Service | Raise awareness about current accessibility efforts and opportunities within AI initiatives. Report on progress that the Office of Academic Innovation (AI) has made in the areas of accessibility efforts and staff service (continued from year 2). | - Expand the focus of our accessibility work to include a wider range of projects at AI, such as online tools and applications.- Expand our current approaches (e.g., Alt Text Writing Jams) to include more diverse participants (e.g., inviting residential students to participate) and more focused topic areas (e.g., data science).- Develop a new accessibility-focused workshop (e.g., making our social media posts accessible).- Share our accessibility efforts within AI and beyond using the AI blog and VP Comm communications channels. | - Two new AI blog posts that report on our expanded focus of online tools and applications.- Additional press coverage of accessibility efforts directed by AI in support of massive open online courses, digital tools, etc.- Two new Alt Text Writing Jams that involve a wider range of participants and focus on a specific topic (e.g., data science).- Create a new workshop and present it to internal/external audiences (e.g., making our social media posts accessible as a Teach Back and as an Enriching Scholarship session). | Rebecca Quintana, Eric Joyce, Yuanru Tan |
| Hold internal knowledge sharing events related to accessibility. |
| Service | Create AI staff "office hours" so that students with ed tech ideas can engage with us more easily. | Create an inclusive and engaging environment for our students by ensuring they receive substantial time with the FTEs who have dedicated resources to mentor and provide feedback to ed tech questions. Also, provide guidance to students who have technical ideas to improve the educational experience. | Survey staff for available office hours times. Request that AI FTEs sign up for slots on the calendar. Advertise available dates/hours/topics to students.  | Marissa Reid, Evan Straub |
| Encourage students to display their work during these sessions to receive professional feedback. | Survey students to see what they'd like to learn and how often they'd like to have office hours available. |
| Service | Recognizing Service and Volunteer Work at AI | Clarify the current annual performance evaluation process and propose a solution for recognizing service in conjunction with formal annual reviews. | Contact staff in OBP to see what it would take to change the review format. | Jen Vetter, Molly Maher, Elyse Aurbach, David Lawrence-Lupton, Trevor Parnell |
| Work with AI staff to define service/volunteer opportunities with AI, within the University, within the community. | Create a list of possible service activities. |
| Lead activity at all-hands meeting to gather feedback on proposal.  | Edit the proposal based on feedback and finalize plan. |
| Explore the possibility of Including service as a component of the position description refresh | Work with Operations staff to create a boilerplate. |