

# **Engagement, Inclusion and Diversity Plan**

*[2014 Update]*

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**Division of Business Services**

December 1, 2014

## **PART ONE: THE CONTEXT OF THE PLAN**

### **INTRODUCTION**

This plan describes the Division of Business Services' commitment to employee engagement, inclusion and diversity (EID), and describes the division's past and current efforts to focus on these values. It also outlines actions the division will take to move towards its desired state.

After review of the 2014 EID survey results, the division has identified a number of key themes and issues to address to improve employee engagement, inclusion and diversity, including the need to further develop leadership and management skills, and provide for better career paths and training opportunities for staff.

The division has also recently formed an EID Committee comprised of representatives from each department and employees from various employment categories including managers and non-managers. A charter has been drafted and the Committee is expected to discuss best practices within the division, recommend additional key actions, and advise division leadership on ways to improve engagement, inclusion and diversity.

Because the work of engagement, inclusion and diversity is never complete, this plan is considered a "living document" and will be revised and updated as the division continues on the path to an engaged, inclusive and diverse workplace.

### **DIVISION MISSION, VISION AND RELATIONSHIP TO STRATEGIC PLAN**

The mission of the Division of Business Services is to support UW-Madison's institutional responsibilities of higher education and research. The division accomplishes its mission through the delivery of essential business services to campus in the areas of accounting, purchasing, materials distribution and surplus, internal audit, risk management, and student account, payment and loan services. The division's primary strategic priorities are as follows:

- Cultivate a Quality Workforce
- Serve as an Effective Campus Partner
- Ensure the Financial Integrity and Preservation of Campus Assets
- Promote Strategic Sourcing and Demand Management
- Enrich the Student Experience

### **BACKGROUND AND HISTORY OF BUSINESS SERVICES**

The division is currently comprised of 170 employees, classified as follows:

<b>Employee Class</b>	<b>Number</b>
Academic Staff	4
Limited Appointment	4
Classified Permanent	106
Classified Project	6
Classified LTE	10
Student Hourly	40
<b>Total</b>	<b>170</b>

Data as of November 2014

The division is organized into five major functional units described below. In addition, the division has a team of **Information Technology** professionals that provides support to the information systems and databases for the five major functional units.

**Accounting Services** is responsible for University-wide controllership and management of campus accounting functions. It influences, develops and implements financial policies and procedures for university-wide business processes for compliance with tax laws and other Federal and State regulations.

The **Bursar's Office** provides student account, cashiering and student loan services to customers while adhering to regulations of governing agencies and implementing financial procedures. The Bursar's Office is also responsible for maintaining the Student Financial Module of the Integrated Student Information System (ISIS) which manages student accounts, electronic billings, financial aid distribution, third party tuition and fee deferrals, and collection services for UW-Madison.

**Internal Audit** conducts independent appraisals of operations involving financial internal controls, operating efficiencies, and compliance. Internal Audit develops and maintains an internal auditing program for evaluating areas of identified institutional risk, and provides special audits upon request of the Chancellor's Office or its representatives.

**Purchasing Services** provides expert purchasing knowledge for specific commodities and contracting techniques, performs the buying functions for campus, develops written policies and procedures, educates and trains customers and delegated agents, promotes vendor/university relationships, and maintains centralized contracting and inventory records to provide control over the procurement cycle.

Materials Distribution Services (MDS) and Surplus With a Purpose (SWAP) are units within Purchasing Services. MDS provides e-commerce ordering for purchasing contracts, storage and delivery services. It is a one-stop web source for office and work materials at the overall lowest cost for UW-Madison, other UW-System campuses, and municipalities. SWAP promotes the sale, reuse, and environmentally-friendly disposal of the State's surplus property.

**Risk Management** manages UW-Madison's participation in the State of Wisconsin's self-funded Workers Compensation, Property and Liability insurance programs. Additionally, the Office identifies, evaluates and controls loss exposure faced by the University. Recently, the position of International Safety and Security Director was hired to help ensure the safety and security for faculty, staff and students at UW-Madison who travel internationally.

Like other organizations, the Division of Business Services faces challenges with respect to increasing engagement, inclusion and diversity, but it continues to approach these challenges as opportunities. The division is continuing to work on creating initiatives and activities to strengthen employee engagement, understand and appreciate the value of inclusion and diversity, and determine how to best incorporate these principles into daily work.

## **SUMMARY OF GOALS**

A fundamental philosophy of the Assistant Vice Chancellor for Business Services (AVCBS) is that people are an organization's most important asset. Numerous studies have shown that the values of engagement, inclusion and diversity are linked to organizational success and productivity, and organizations that instill those values attract and retain the brightest and best employees.

Business Services continues to weave a philosophy of engagement, inclusion and diversity into its culture. As these values are seen and used more strategically over the next year, they will be evident in division policies and procedures, employee performance standards and evaluations, and will be tied to division performance indicators and measures.

While separate goals for engagement, inclusion and diversity are described later in this plan, all share a common denominator and can be summarized into a singular goal as follows:

*The goal of the Division of Business Services is to cultivate a cohesive a quality workforce such that a world-class research institution of the caliber of UW-Madison receives the essential business services it needs and deserves.*

## **PART TWO: THE CONTENT OF THE PLAN**

### **SECTION I: INCREASING REPRESENTATION AND RECRUITMENT**

#### **GOALS**

According to the VCFA Implementation Resource Guide, diversity is a range of human qualities that impact and influence how people are perceived and how they behave. These qualities include, but are not limited to: age, gender, race, ethnicity, color, physical and mental attributes, sexual orientation, marital status, geography, location, spirituality, education, values and beliefs.

Understanding and appreciating the value of human differences will only help get the work of the division done. Towards that end, the goals of the Division of Business Services are to:

- Draw from a more diverse pool of qualified applicants when recruiting for positions.
- Demonstrate an increase of currently under-represented populations in its workforce.

#### **CURRENT STATE**

The following tables provide a summary of the Gender and Heritage Data Profile for Business Services, as of October 2014:

<b>By Gender</b>	<b>Female</b>	<b>Male</b>	<b>Unknown</b>
All Staff	53.28%	46.72%	0.00%
Executive/Managerial	42.86%	54.14%	0.00%
FLSA Non-Exempt Staff	60.00%	40.00%	0.00%
FLSA Exempt Staff	47.37%	52.63%	0.00%
Supervisor, primarily FLSA Non-Exempt Staff	50.00%	50.00%	0.00%
Supervisor, primarily FLSA Exempt Staff	25.00%	75.00%	0.00%

<b>By Heritage</b>	<b>Non-White</b>	<b>White</b>	<b>Unknown</b>
All Staff	11.47%	85.25%	3.28%
Executive/Managerial	0.00%	100.00%	0.00%
FLSA Non-Exempt Staff	12.31%	86.15%	1.54%
FLSA Exempt Staff	10.53%	84.21%	5.26%
Supervisor, primarily FLSA Non-Exempt Staff	12.50%	87.50%	0.00%
Supervisor, primarily FLSA Exempt Staff	25.00%	50.00%	25.00%

By comparison, the following tables provide a summary of the Gender and Heritage Data Profile for the division from October 2012:

<b>By Gender</b>	<b>Female</b>	<b>Male</b>	<b>Unknown</b>
All Staff	58.00%	42.00%	0.00%
Academic Staff and Classified Career Executives	54.50%	45.50%	0.00%
FLSA Non-Exempt Staff	56.70%	43.30%	0.00%
FLSA Exempt Staff	61.10%	38.90%	0.00%
Supervisor, primarily FLSA Non-Exempt Staff	50.00%	50.00%	0.00%
Supervisor, primarily FLSA Exempt Staff	62.50%	37.50%	0.00%

<b>By Heritage</b>	<b>Non-White</b>	<b>White</b>	<b>Unknown</b>
All Staff	10.10%	88.20%	1.70%
Academic Staff and Classified Career Executives	9.10%	90.90%	0.00%
FLSA Non-Exempt Staff	8.30%	90.00%	1.70%
FLSA Exempt Staff	11.10%	86.10%	2.80%
Supervisor, primarily FLSA Non-Exempt Staff	25.00%	75.00%	0.00%
Supervisor, primarily FLSA Exempt Staff	12.50%	87.50%	0.00%

The 2014 EID Survey data suggest that, according to respondents, the division continues to be generally welcoming to employees from diverse backgrounds. Some responses of interest from the diversity and inclusion portion of the 2014 Survey are:

- 76% of responses favorably thought their work unit is welcoming to employees of color.
- 81% of responses favorably thought their work unit is welcoming to all people regardless of gender.
- 74% of responses favorably thought their work unit is welcoming to all people regardless of sexual orientation.
- 68% of responses favorably thought their co-workers are open and welcoming to others who are different from them.

By comparison, following are the responses to the same questions from the 2012 Survey results:

- 78% of responses favorably thought their work unit is welcoming to employees of color.
- 79% of responses favorably thought their work unit is welcoming to all people regardless of gender.
- 74% of responses favorably thought their work unit is welcoming to all people regardless of sexual orientation.
- 71% of responses favorably thought their co-workers are open and welcoming to others who are different from them.

### **DESIRED STATE**

The Division of Business Services will be an organization that values, attracts and retains a broad-based workforce comprised of a diverse range of human qualities and unique perspectives.

### **KEY ACTIONS**

Following are key actions that the Division of Business Services plans to implement in the upcoming year. As the division's EID plan continues to mature, employees from various work areas and employee types will be identified to help coordinate these actions.

#### **Conscientious Recruitments**

- Prior to beginning a recruitment, hiring supervisors will work with their director and the Assistant Vice Chancellor for Business Services (AVCBS) to consider the needs of the unit and the division, the skills required of the position and how they can create a broad, diverse and qualified applicant pool.
- Balanced and diverse interview panels and search/screen committees will be promoted and training provided to such panels and committees regarding bias literacy and interview parameters (e.g., WISELI Guide and Training for Search Committees on Excellence & Diversity).

#### **External Recruitments**

- Hiring supervisors continue to look at internal candidates to fill vacant or new positions, but are also conducting more external recruitments to attract a more diverse pool of applicants.
- The division will continue to research and use recruitment and networking resources that provide access to a broad, diverse and highly qualified applicant pool. Options include the Centro Hispano, the Urban League, Latino Support Network and the Madison Network of Black Professionals.

- The division will explore utilizing career networking tools, such as LinkedIn, to identify qualified active, as well as passive, job seekers.

#### **Student Employment Initiatives**

- The division will continue to collaborate with the Recruitment Initiative for Student Employees (RISE) and participate in the annual RISE job fairs.
- The division will continue its representation on the VCFA's Student Employment Initiative to enhance the student employment experience.
- The division will explore partnerships with other schools, colleges and student organizations to identify a new pool of student talent to draw from.

#### **Campus Diversity Involvement**

- The division currently has an employee representative on the VCFA EID Council, who will serve as a valuable liaison between other VCFA units and the division.
- The division also has two employees who were elected to the Classified Staff Congress.

#### **Training and Performance Expectations**

- According to the 2014 EID Survey, employees would like their supervisors and managers to show greater leadership abilities. The division will research and provide educational and training opportunities for supervisors and managers related to leadership and how to leverage the diverse talents that currently exist within the division.
- EID competencies will be incorporated into the performance standards for all managers and supervisors.

### **KEY MEASURES**

The Division of Business Services will focus on the following measurements to track key actions regarding representation and recruitment:

- 1) The number and percentage of division employees from under-represented populations as identified in the Gender and Heritage Profile for the division. This measurement will help the division determine how successful its actions may be in creating a diverse workforce.

## ***SECTION II: INCREASING ENGAGEMENT***

### **GOALS**

According to the VCFA Implementation Resource Guide, engagement is defined as being fully involved in, and enthusiastic about, work. Engaged employees have a heightened connection to their work, the organization, its mission and their co-workers. Engaged employees find personal meaning in their work and are more likely to go beyond the minimum and expend discretionary effort.

Research indicates that engaged employees are also more productive and more likely to be accepting of organizational change. Furthermore, there is a strong correlation between employee engagement and desirable business outcomes including customer service and financial performance. The goal of the Division of Business Services is to:

- Build a collaborative and inclusive work environment that enhances employees' engagement with their position and the university.

## **CURRENT STATE**

Business Services produced an overall response rate of 84% for the 2014 EID Survey, compared to a response rate of 68% for the 2012 EID Survey. The higher response rate may itself be an indicator of increased engagement in the division, however, the increase could also be due to better division-wide communication and coordination of the 2014 Survey.

A summary of the 2014 EID Survey data indicates that 36% of division employees are engaged, 40% are somewhat engaged and 24% are not engaged. Some responses of interest from the engagement portion of the 2014 Survey are:

- 57% indicate they have the resources to do job well.
- 48% feel recognition is based on performance in their work unit.
- 51% are satisfied with the recognition they receive for their work.
- 64% feel their job makes good use of their skills and abilities.

By comparison, following are the responses to the same questions from the 2012 Survey results:

- 59% indicate they have the resources to do job well.
- 26% feel recognition is based on performance in their work unit.
- 32% are satisfied with the recognition they receive for their work.
- 68% feel their job makes good use of their skills and abilities.

This past year, the division initiated or completed several efforts designed to encourage employee engagement, including:

### **Launch of Division Intranet Site**

In July 2014, the Division of Business Services launched its own intranet site. The purpose of the intranet is to share division successes with employees through a shared portal. The intranet is also used for disseminating campus news, information and updates with division staff.

Employees are encouraged to share relevant information and photos to make the intranet an engaging, inclusive, and useful tool for staff. The intranet site has a separate page for EID information and activities and, most recently, a Student Resources page was added to increase engagement for the division's student employees.

### **Employee-Involved Performance Appraisal Process Review**

In the past year, the division rolled out a new employee evaluation process and appraisal document. This was a result of a review conducted by a division work-group comprised of both managers and non-managers charged with developing recommendations to improve the process. All division employees were informed of this initiative and provided an opportunity to provide feedback in a variety of ways such as small group meetings, department staff meetings, individual discussions and anonymous surveys. As a result of this effort, the process and appraisal document includes not only an evaluation of employees based on technical competencies but also competencies related to interpersonal skills, collaboration, communication and respectfulness.

## **DESIRED STATE**

The Division of Business Services will be an organization in which employees take ownership and pride in the mission and accomplishments of the division.



## **KEY ACTIONS**

Following are key actions that the Division of Business Services plans to implement throughout the next year. As the division's EID plan continues to mature, employees from various work areas will be identified to help coordinate these actions.

### **Division EID Committee**

- The division has recently formed an EID Committee comprised of representatives from each department and employees from various employment categories including managers and non-managers. A charter has been drafted and the Committee is expected to discuss best practices within the division, recommend additional key actions, and advise division leadership on methods to improve engagement, inclusion and diversity.

### **Additional Training and Support for Managers and Supervisors**

- According to the feedback from the 2014 EID Survey, employees indicated that supervisors and managers needed to improve their leadership and communication skills. Working with the EID Committee and OHRD, the division will explore additional training opportunities and facilitated discussions for managers and supervisors to come together and discuss ideas, receive feedback, and enhance management/leadership skills.

### **Utilize Intranet as an Information Resource**

- The Intranet will be an important tool to provide division staff with information on EID training opportunities and resource materials. Working with the division's EID Committee and OHRD, various mechanisms will be explored such as approved videos and webinars that focus on the subjects of leadership, diversity and engagement that staff can access via the intranet.

### **Appreciate Accomplishments in Relation to the Campus Community**

- The division is in a unique position to work with employees from across campus and in relation to many large and exciting campus projects and initiatives. Employees will be given the opportunity to see and celebrate the outcome of their hard work and their relationship to the campus community. This could take the form of touring campus facilities or learning about campus projects and initiatives.

## **KEY MEASURES**

The Division Business Services will focus on the following measurements to track key actions regarding engagement:

- 1) The division is currently exploring options to track employee usage of the division's intranet site. Since the intranet site is intended to increase a sense of engagement, measuring how often and to what extent division employees utilize the site will help determine how connected employees feel to the division, their co-workers and their work.
- 2) The division will also continue to measure response rates to subsequent EID surveys, as an increase in the number of employees who respond to the survey may be one indicator of a sense of engagement and that their opinion matters.

## **SECTION III: INCREASING INCLUSION**

## GOALS

According to the VCFA Implementation Resource Guide, inclusion refers to a sense of belonging, feeling respected, valued, seen for who you are, and valued as a contributing member of the team, work group, or organization. An inclusive culture is one in which barriers to contributions are eliminated, biases are eliminated, and people are respected and able to give their personal best.

Research has demonstrated that, even if an organization has diversity in its midst, employees may not perceive that they are welcome or appreciated. The goal of the Division of Business Services is to:

- Build a work environment so that all employees are supported, included and connected.

## CURRENT STATE

The 2014 EID Survey data suggest that, according to respondents, the division needs to improve and increase efforts that foster a sense of inclusion, respect and value among division employees. Some responses of interest from the inclusion portion of the 2014 Survey are:

- 66% of responses indicate that employees feel they are treated with respect at work.
- 69% feel their supervisor respects and values their work.
- 62% feel that their unit co-workers value and respect each other.
- 65% feel comfortable providing feedback to their work unit on work issues.

By comparison, following are the responses to the same questions from the 2012 Survey results:

- 73% of responses indicate that employees feel they are treated with respect at work.
- 74% feel their supervisor respects and values their work.
- 72% feel that their unit co-workers value and respect each other.
- 71% feel comfortable providing feedback to their work unit on work issues.

At the same time, other survey indicators regarding inclusion seem to suggest that some progress has been made towards building a work environment where employees feel supported, included and connected:

According to the 2014 Survey:

- 62% of responses indicate that employees would recommend their unit as a good place to work.
- 70% feel that their work unit is comfortable to them.
- 57% have felt the “silent treatment” from someone at work.
- 60% feel policies are applied fairly in their work unit.

By comparison, responses to the same questions from the 2012 Survey results were:

- 60% of responses indicate that employees would recommend their unit as a good place to work.
- 71% feel that their work unit is comfortable to them.
- 66% have felt the “silent treatment” from someone at work.
- 57% feel policies are applied fairly in their work unit.

Nonetheless, all of the indicators above suggest that the division still needs to improve and increase efforts aimed at building an inclusive work environment and further advance on the “Path to Inclusion.”

## **DESIRED STATE**

The Division of Business Services will be an organization that supports its employees and treats them equitably and respectfully.

## **KEY ACTIONS**

Following are key actions that the Division of Business Services plans to implement throughout the next year. As the division's EID plan continues to mature, employees from various work areas will be identified to help coordinate these actions.

### **Distribution and Discussion of 2014 EID Survey Results**

- The division has already broadly disseminated the results of the 2014 EID Survey to all employees, as well as the major themes from the verbatim comments.
- The division will schedule facilitated discussions for supervisors, managers and staff to discuss the survey and ways to foster a sense of inclusion within the division.

### **Celebrate Differences**

- The division will provide information to employees via the intranet about campus events that provide opportunities for employees to understand and learn to appreciate other cultures, and connect with other employees to share experiences.
- The division will also sponsor events that provide opportunities for employees to connect, understand and appreciate differences.

### **Employee Onboarding**

- The division's current on-boarding efforts continue to vary across work units. Efforts will be heightened to develop a more comprehensive and consistent approach that goes beyond a checklist of tasks to complete and includes ways for new employees to feel connected to the division, co-workers and campus.

### **Additional Support and Training**

- Additional support and training opportunities will be provided to all employees to promote respectful behavior and cultural understanding.

## **KEY MEASURES**

The Division Business Services will focus on the following measurements to track key actions regarding inclusion:

- 1) The number of employees who participate in training and engagement opportunities provided to appreciate and celebrate differences. The amount of employee participation is one indicator of the level of support for an inclusive environment.
- 2) By comparing past, current and subsequent EID survey indicators that most closely relate to inclusion (i.e., Q1e, Qd4, Q5j, and Q20).