

Report on Diversity Efforts in Financial Management

Valuing diversity is a core value of Financial Management. Financial Management uses a very broad definition of diversity. In addition to the categories identified by the steering committee (race, gender, disability, class, sexual identity/orientation, religion, age, ethnicity, culture, region/geography and indigenous status), Financial Management also values variety in work styles, personality types and education levels.

Approximately one third of the Financial Management (FM) staff members are immigrants and non-native English speakers. Specific efforts are made to address issues of diversity within the division in order to maximize employee performance and customer satisfaction. Our diversity initiative complements other work being done on campus to support the UW's mission of creating a comfortable educational environment that will attract and retain the best and the brightest from all backgrounds.

Current Financial Management efforts in the interest of diversity:

- Biennial employee surveys to gauge satisfaction in the workplace and answer specific questions about diversity
- Measure on the Operational Performance Dashboard that gauges “% of staff who agree that making FM more diverse will make the organization better overall (top two ratings on the 7 point scale). Current measure is 72%; target is 90%.
- Formal on-going diversity initiative
- Two teams focus specifically on diversity; one has created a mentoring program with an emphasis on diversity, and the other helps to educate and make the division more aware and appreciative of diversity
- Development and presentation of mandatory diversity training
- Additional training for supervisors and managers
- Ongoing program for diversity-related presentations
- A diversity calendar on the web
- A roster of internal interpreters
- A roster of conversation coaches for improving English skills
- A set of measurements that reflect the importance of cultural competence
- Accountability to cultural competence
- An ongoing English Skills in the Workplace program for non-native speakers, offered through UW English Skills Programs
- Educational outreach program to students, parents, prospective students and campus staff, many of which are in partnership with or by request from Office of Minority Affairs
- Employee development plans for all staff that include financial support and release time for training and other developmental activities

Beginning in the spring 2001, an ongoing diversity initiative was launched as a part of the quality improvement approach used in Financial Management. The initiative was stimulated by findings in the biennial employee survey that indicated the working climate could be more inclusive and welcoming for all staff, and by the concern that the senior

leadership team is all Caucasian. Leaders at other levels more appropriately reflect the staff composition, but they haven't reached the highest levels and Financial Management senior leaders wanted to begin addressing that issue directly. MOSAIC was hired to conduct a diversity audit. The audit was completed at the end of the summer 2001. In the autumn of the same year, 6 focus groups were held to better understand the results of the audit. Results of the focus groups' work were presented to all of Financial Management in winter 2001.

As a result of the information gathered, two teams were chartered: 1) promotions and recognition and 2) organizational climate and communications.

The promotion/recognition team (called DREAM) developed a mentoring program, which pairs volunteer leaders/mentors and self-identified mentorees. Great diversity is reflected among the active participants in the program, and it has proven to be a tool for development for both mentors and mentorees. 17 pairs are currently matched and have been working since May 2003; another cohort will begin in April.

The second team was charged with developing and offering mandatory diversity training for all 200 employees, and an additional training for those who supervise or manage a diverse work force. Phoenix Consulting was hired to partner with an internal trainer to create and deliver division-wide training. The internal consultant conducted the supervisory/management sessions. All the training was completed in the spring 2003.

In addition, the communication/climate team coordinates a series of diversity-related events, has designed a diversity calendar, and has identified a group of multilingual employees willing to serve as interpreters in customer service situations; a list of native English speakers willing to partner with ESL employees to practice conversational English on an informal basis. A culture fair is being planned for the summer 2004.

FM is in the process of transforming the way work is done. We are moving away from transaction-based work to knowledge-based work. It is imperative that we make the most of the resources represented in our staff. It is also essential that we are able to convey and hold people accountable to new expectations. One of the most interesting outcomes of our diversity initiative is the growing awareness that there are cultural differences in the way people interpret concepts like "initiative," "collaboration" and other skills or qualities highly valued by Financial Management. A goal is to share the most concrete examples of abstract concepts without undervaluing the unique characteristics of the individual.

Other activities include review of hiring and promotion practices, identifying skills needed to work in a diverse environment, learning more skills for resolving conflict, and methods for enhancing inclusiveness and consensus building.

FM contracted with the English Language Program (part of Extension) to provide classes for those employees who wanted to improve their English skills. The classes are offered during work time. Classes have been offered now for 7 quarters. Custodial Services,

Computing and Communications, and the Business School have joined with us in this program.

Employees are encouraged to participate in planning for their personal and professional development by writing individual Employee Development Plans, which serve as a tool for discussing future goals and skills development for each employee. Financial Management strongly encourages and funds education and training for employees.

An Outreach unit was recently formed within Student Fiscal Services (SFS) to educate students, advisers, potential students and parents about money management (Money 101) and navigating the maze of bureaucracy at the UW. Many classes have been offered at the request of Office of Minority Affairs staff. SFS offered two years of instruction for the Gear Up Program on Leadership Skills for life, and has continued with Gear Up the last two years by offering Money 101. The Money 101 program has been translated into Spanish, with future plans for translations in Vietnamese and Chinese.

In conclusion, for Financial Management to be most effective, staff members need to be culturally competent. We are working now on defining that for Financial Management and then will set performance measures and resulting accountability.

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