



DIVISION OF FINANCE & ADMINISTRATION Inclusive Excellence Action Plan 2022-2027

As of 6/17/24

Background

The Division of Finance & Administration (DFA) is one of the largest and most diverse units on campus with over 500 staff who hail from across the globe and speak 25 languages. Our work varies greatly across units, from frontline staff who keep our campus looking great and running smoothly to finance professionals who may balance budgets and pay bills fully remotely – and everything in between! Learn more about our units in Appendix A.

DFA is strongly committed to diversity, inclusion, and the university's shared values of openness, justice, respect, integrity, innovation, and responsibility. We endeavor to provide a culture and environment that is accessible, inclusive, and supportive of people of varied backgrounds interacting effectively in a climate of mutual respect.

Summary

DFA has taken a three-phase approach to developing a robust Inclusive Excellence Action Plan (IEAP).

Phase 1 - FY23

The first DFA Inclusive Excellence (IE) Committee was formed (membership detailed in Appendix B). They analyzed DFA Campus Climate Survey data (findings detailed in Appendix C) and developed eight overarching goals:

Original overarching goals

Recruitment & Retention	Professional Development	Accessibility
<ul style="list-style-type: none"> Build & maintain an infrastructure that supports diversity & inclusion within the DFA Increase the diversity & overall rates of successful recruitments through effective, deliberate efforts Establish a communication plan to ensure timely, consistent messaging across and within DFA units 	<ul style="list-style-type: none"> Provide a supportive culture, and access to continued professional growth opportunities for our employees Establish an accountable program of cultural competency and inclusive excellence 	<ul style="list-style-type: none"> Work with campus partners to improve the level of support within the DFA for those whose first language is not English Improve level of ADA compliance on our websites and other online content Decrease the physical accessibility barriers in our spaces

Phase 2 - FY24

The next IE Committee ran a robust stakeholder engagement and data-gathering process with surveys and focus groups (Appendix D). DFA staff shared their priorities and ideas for accomplishing the eight

goals. The IE Committee revised the goals and created a 27-point Action Plan based on this input that includes a [Committee Charter](#) to provide a means to achieve our goals.

Phase 3 - FY25

An IE Steering Committee and three Action Committees will be created using the charter developed in Phase 2. They will begin implementation of the Action Plan in July 2024.

Action Plan

The following outlines our 8 goals and the corresponding actions under each of the four themes. Action Committees (AC) will review and prioritize their assigned work and identify measures, resources and timelines for each item. AC chairs will report to the DFA Steering Committee regularly.

Accountability and Success (Steering Committee)

1. Establish a culturally competent, inclusive, and accountable environment within DFA
 - 1.1. DFA Leadership is accountable for attaining the division's IE goals
 - 1.2. Engage all levels of staff in attaining the division's IE goals
 - 1.3. Increase participation in Campus Climate Surveys and other campus-wide data collection efforts

Recruitment & Retention

2. Improve and maintain **equitable recruitment programs** that support diversity and inclusion within the DFA
 - 2.1. Streamline and reduce the time involved in hiring processes, especially for frontline workers
 - 2.2. Require all supervisors and hiring managers to follow EEO recruitment guidelines and to complete annual recruitment diversity training
 - 2.3. Formalize recruitment tracking processes to identify and address patterns and opportunities for improvement
3. Build and maintain **equitable retention programs** that support diversity and inclusion within the DFA
 - 3.1. Develop and budget for meaningful staff recognition programs
 - 3.2. Work with HR to conduct regular market pay/wage reviews (1-3 years)
 - 3.3. Establish a DFA employee referral bonus program for UE positions
 - 3.4. Formalize DFA orientation and onboarding processes
4. Establish a divisionwide **communication plan** to ensure timely and consistent messaging across and within DFA units
 - 4.1. Create communications expectations to ensure staff are aware of updates, opportunities & benefits
 - 4.2. Provide communications through diverse modalities that work best for all populations
 - 4.3. Develop a schedule and multiple formats for regular DFA and/or department-level Town Hall/updates
 - 4.4. Hold regular "Coffee Hours" to facilitate more informal cross-department connections

Professional Development

5. Provide a supportive culture of, and access to, continued **professional growth** opportunities for DFA employees
 - 5.1. Increase DFA participation in professional development, and DEI opportunities
 - 5.2. Redesign ESOL class offerings to better meet our employees' needs
 - 5.3. Create DFA-specific professional development opportunities that match career path development levels
 - 5.4. Improve DFA communications about PD opportunities through UVM and beyond

Accessibility

6. Work with campus & community partners to improve the level of support within the DFA for **English Speakers of Other Languages**
 - 6.1. Partner with the campus and community to identify translation and interpretation technology
 - 6.2. Provide compensation for staff who provide translation/ interpretation services for ESOL
 - 6.3. Establish ESOL protocols for consistent communications and access to UVM-sponsored initiatives
7. Improve the level of ADA compliance on **DFA websites** and other online content
 - 7.1. Establish DFA web team to ensure cohesive and current information is published
 - 7.2. Ensure DFA staff know how to access digital accessibility resources, and how to report concerns
8. Support the improvement of **physical access** to campus spaces, and in particular, DFA spaces
 - 8.1. Improve physical accessibility of all DFA spaces
 - 8.2. Provide resources to improve accessibility barriers
 - 8.3. Follow best practices on hosting accessible in-person & online meetings/events, & provide reasonable accommodations
 - 8.4. Ensure DFA staff know how to access physical accessibility resources, and how to report concerns



Division of Finance and Administration

Steering & Action Committee Charter

Purpose

The DFA steering committee (SC) will provide a strong foundation to ensure the continuous evolution and success of the Division of Finance & Administration's Inclusive Action Plan. The SC is responsible for overseeing, supporting and providing guidance to the DFA Inclusive Excellence action committees.

Action committees are responsible for implementing the goals and actions assigned to their respective committees. Action committee chairs will report to the steering committee as needed, but at a minimum monthly for the first year, and quarterly thereafter.

The DFA Action Plan includes goals intended to build community and engagement, which in turn will contribute to an open and enjoyable place to work and grow for all members of our division.

Structure

Steering Committee

Membership will consist of the Vice President for Finance & Administration and their direct senior leadership team, currently 7 members.

Action Committees

Each action committee will include a DFA senior leader who will act as Chair, and 4-5 members from the different departments within the DFA, as noted below.

There will be a maximum of 6 people on each committee at any one time. To maintain enthusiasm and provide the opportunity for all to participate, members will have a staggered 2-year term limit. Directors are asked to encourage people to participate and allow a reasonable amount of available time to do so.

Action Committee Membership Process

In May - June of each year, DFA leadership and IDEA members will encourage DFA staff to consider getting involved with the IDEA by joining a committee, a subcommittee, or by other means. Interested members will consult with their supervisor to ensure they are provided with the proper workload flexibility to contribute to an action committee.

Staff will submit a form (via electronic or hard copy) expressing their interest. The Steering Committee will review the full list of interested parties and make the final assignments based on the committees' needs, and diversity of departmental representation. New assignments will begin on July 1, and will be announced to the DFA.

Additional engagement opportunities for those not serving on committees will arise with the development of potential subcommittees within each action committee.

Steering Committee		
VPFA (Chair) and Senior Leader Team (VPFA direct reports)		
Recruitment & Retention Action Committee	Professional Development Action Committee	Accessibility Action Committee
Chair and 3-5 additional members, who may include: <ul style="list-style-type: none"> ▪ Analyst ▪ Hiring manager ▪ Recognition team member 	Chair and 3-5 additional members, who may include: <ul style="list-style-type: none"> • Custodial Services representative • DFA functional subject matter experts as needed to create topic-specific professional development (subcommittee) 	Chair and 3-5 additional members, who may include: <ul style="list-style-type: none"> • Custodial Services representative • DFA web team representative • PD&C representative

Roles and Responsibilities

Steering Committee – ongoing term

- VPFA, Chair
- Senior Leader Team
- Meet monthly for the first year, quarterly thereafter, and on an ad hoc basis as needed
- Chair one Action Committee every 2 years

Action committees

- Determine performance indicators for each goal/action using the provided framework
- Prioritize goals and actions over the 5-year span of the plan
- Establish subcommittees to address specific actions/projects as needed
- Strategically collaborate with other action committees to minimize duplication of effort
- Regularly review and assess the applicability/appropriateness of the committee’s goals and recommend revisions as needed

Action Committee Chair – two-year term (July 1 – June 30)

- Member of the Senior Leader team (re-evaluate this after 2 years to determine if this role should be opened to a broader group.)
- Beyond meetings and project work, assume some responsibility for pushing through project goals, assisting in meeting agendas, and running committee meetings.
- Provide committee updates, successes and challenges at Steering Committee meetings
- Be a voice of DFA as it relates to IDEA in campus meetings.
- Meet with other action committee chairs/members on ad hoc basis to coordinate IDEA efforts.
- Provide leadership support to subcommittee chairs as assigned/needed
- Estimated monthly effort of 5-6 hours.

Action Committee Members – two-year term (July 1 – June 30)

- Meet, on average, monthly for a 60–90-minute session.
- Perform work related to active goals.
- Uphold the beliefs of the committee in a professional and appropriate manner.
- Estimated monthly effort of 3-4 hours.
- One member per action committee also serves as member of the University Diversity Council (additional 1 hour/month commitment)

Subcommittee Chair – term to be determined by scope of work, but not to exceed two years

- Assume some responsibility for pushing through project goals, assisting in meeting agendas, and running subcommittee meetings.
- Rely on support from the committee chair as needed.
- Provide subcommittee updates, successes and challenges to committee chair, frequency and modality to be determined by the chair.
- Uphold the beliefs of the committee in a professional and appropriate manner.
- Estimated monthly effort of 4-5 hours (not including Action Committee time commitment)



Appendix

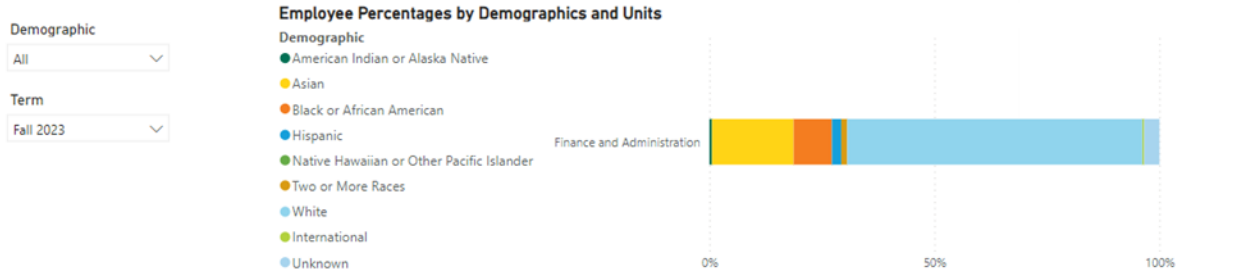
A. Leadership and Units within the DFA

The [DFA](#) consists of the following units:

- Administrative Business Service Center (ABSC), Kelley Ficklin, Interim Director
- Facilities Management (FM), Luce Hillman, Executive Director
 - Custodial Services
 - Physical Plant Department
 - Planning, Design & Construction
 - Transportation & Parking Services
- Finance & Facilities Administration (FFA), Jennifer Greaves, Director
- Financial Analysis & Budgeting (FAB), Shari Bergquist, University Budget Director
- Office of Sustainability (OS), Elizabeth Palchak, Director
- University Financial Services (UFS), Claire Burlingham, University Controller
 - Disbursement Center
 - Financial Accounting, Costing, and Treasury Services
 - Non-credit Registration
 - Payroll & Tax Services
 - Print & Mail Center
 - Purchasing Services
 - University Event Services
 - UVM Bookstore

DFA demographics as of Fall 2023

Unit Type	Staff	Management	Officers of Administration	Total
☐ Administrative Unit	515	11	3	529
☐ Finance and Administration	515	11	3	529
Admin Business Service Ctr	13	1		14
Controllers Office	2		1	3
Custodial Services	212	1		213
Disbursement Center	15	1		16
Facilities Management	4	1		5
Fin Rptng & Acct Svcs	8	1		9
Finance and Facilities Admin	7			7
Financial Analysis & Budgeting	4		1	5
Non Credit Registration Office	4			4
Office of Sustainability	6			6
Payroll and Tax Services	11	1		12
Physical Plant Dept	115			115
Planning Design & Construction	15	1		16
Print & Mail Center	14			14
Purchasing	6	1		7
Transportation & Parking Admn	28	1		29
Treasury Services	4			4
University Event Svcs	14	1		15
UVM Bookstore	29	1		30
VP Finance & Administration	4		1	5
Total	515	11	3	529



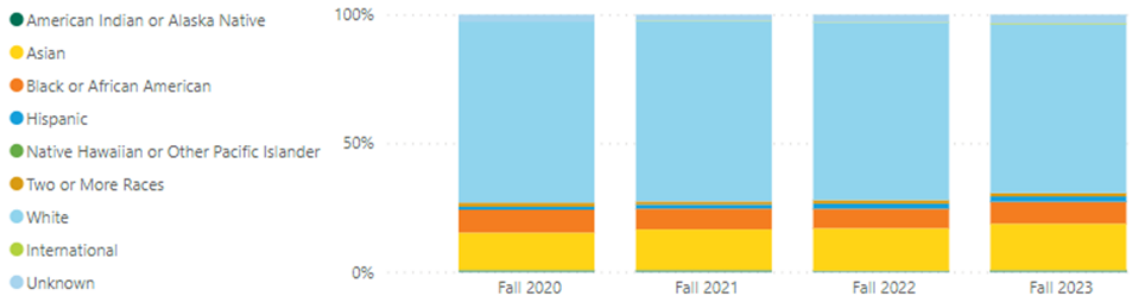
Employee Headcounts by Demographics and Units

Demographic	American Indian or Alaska Native		Asian		Black or African American		Hispanic		Native Hawaiian or Other Pacific Islander		Two or More Races		White		International		Unknown		Total	
	N	%	N	%	N	%	N	%	N	%	N	%	N	%	N	%	N	%	N	%
Finance and Administration	3	0.6%	96	18.1%	45	8.5%	11	2.1%	0	0.0%	7	1.3%	347	65.6%	2	0.4%	18	3.4%	529	100.0%
Total	3	0.6%	96	18.1%	45	8.5%	11	2.1%	0	0.0%	7	1.3%	347	65.6%	2	0.4%	18	3.4%	529	100.0%

Employee Headcounts by Demographics and Units

Demographic	Female		Male		Total	
	N	%	N	%	N	%
Finance and Administration	252	47.6%	277	52.4%	529	100.0%
Total	252	47.6%	277	52.4%	529	100.0%

Employee Percentage Trends by Demographics



Employee Headcount Trends by Demographics

Term	Fall 2020		Fall 2021		Fall 2022		Fall 2023	
	N	%	N	%	N	%	N	%
American Indian or Alaska Native	3	0.6%	3	0.6%	2	0.4%	3	0.6%
Asian	74	14.6%	79	15.9%	83	16.5%	96	18.1%
Black or African American	45	8.9%	40	8.0%	38	7.6%	45	8.5%
Hispanic	6	1.2%	8	1.6%	10	2.0%	11	2.1%
Native Hawaiian or Other Pacific Islander	0	0.0%	0	0.0%	0	0.0%	0	0.0%
Two or More Races	8	1.6%	6	1.2%	7	1.4%	7	1.3%
White	356	70.4%	349	70.2%	347	69.1%	347	65.6%
International	0	0.0%	1	0.2%	1	0.2%	2	0.4%
Unknown	14	2.8%	11	2.2%	14	2.8%	18	3.4%
Total	506	100.0%	497	100.0%	502	100.0%	529	100.0%



Division of Finance and Administration

B. Inclusive Excellence Committee Members

Name	Title	Department/Unit	Phase 1	Phase 2
Richard Cate, sponsor	Vice President (VPFA)	Finance & Administration	X	X
Cindy Lee*	Sr Assistant to VPFA	Office of the VPFA	X	X
Rebecca Myer*	HR Administrator	Finance & Facilities Administration	X	X
Caylin McCamp*	Sustainability Project Manager	Office of Sustainability	X	X
Kory Anderson	Customer Services Supervisor	FM/Transportation & Parking Services		X
Brendan Andrews	Assistant Director	UFS/UVM Bookstore		X
Eric Berliner	Director	FM/Physical Plant Department	X	X
Jenny Brittenham-Jones	Treasury Management Professional	UFS/Treasury Services	X	
Kate Coffey	Architect	FM/Planning, Design & Construction	X	
Brit Chase	Budget Analyst	Financial Analysis & Budgeting	X	
Stacy Chia	VPFA Executive Assistant	Finance & Administration		X
Shane Desautels	Director	UFS/Print & Mail Center		X
Claire Forbes	Associate Planner	FM/Planning, Design & Construction	X	X
JP Marton	Custodial Maintenance Specialist	FM/Custodial Services	X	
Issouf Ouattara	Kronos Processing Specialist	Payroll and Tax Services	X	X
Julian Rodriguez	Financial & Budget Analyst	Finance & Facilities Administration		X
Domebera Somda	Custodial Services Supervisor	FM/Custodial Services	X	
Paula Tarte	Office Administrator	FM/Transportation & Parking Services		X

FM = Facilities Management
 UDC = University Diversity Council
 UFS = University Financial Services
 * co-chair, UDC member

C. 2022 Campus Climate Survey Data

At the time of the most recent [Campus Climate Survey \(CCS\)](#), there were 518 employees within the Division of Finance & Administration.

Despite DFA being the largest unit on campus, we had the lowest response rate; only 23% of our employees participated in the survey (118 participants). This is due, in part, to a lack of translatable options for staff whose first language is not English and/or lack of accessibility to take the survey.

Based on some of the CCS responses, the division has several noteworthy points of pride. For instance, our staff hold themselves to the high standards and principles of Our Common Ground, and report to be satisfied with how their departments uphold the standards and principles of Our Common Ground. We are listening and are thoughtful about the campus discussions related to equity and inclusion, and we are motivated to continue our learning and growth in areas related to equity and inclusion.

The DFA has the richest diversity of all other units at UVM. We speak 25 languages and hail from across the globe. Through our diverse and dedicated population, the DFA has unique opportunities to learn from each other.

We also have much work to improve the climate and culture of our division. The CCS data indicated significant issues in the following areas:

- Speaking up about workplace issues
- Equal career opportunities
- Equitable pay
- Discrimination
- Bias

D. DFA 2023 Survey & Focus Group Results

Survey Participants

- 155 Participants/529 DFA employees = 29% participation rate
- Representation from 15 departments
- Survey results from participants speaking 6 different languages

Focus Group Participants

- 55 Participants /529 DFA employees = 10% participation rate
- Representation from 12 departments

Themes

- Areas with greatest challenges: Recruitment and Retention
- Most frequent comment: Increase pay
- Employees are generally satisfied with DFA's efforts to promote and practice cultural competency and inclusivity.
- Overall, employees feel valued by their coworkers and departmental leadership.
- Communication beyond department level needs to be improved.