

UW COLLEGES and UW-EXTENSION

A REVIEW OF THE OFFICE OF WORKFORCE EQUITY AND DIVERSITY

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EXECUTIVE SUMMARY

The primary purpose of this review report is to examine the Office of Workforce Equity and Diversity's (OWED) mission, resources, organizational structure and unit Director's role responsibilities. The major byproduct of the review is a set of recommendations to increase OWED's diversity impact within the newly integrated UW Colleges and UW-Extension system. Moreover, this review builds on previous efforts like the Equal Employment Opportunity and Diversity Programs Workgroup to position OWED as a value added component within the system. The review not only examined the findings and recommendations from those earlier efforts but also incorporates the ideas and suggestions of over 25 UW Colleges and UW-Extension stakeholder interviewees.

This review report highlights the following key recommendations:

1. Integrate diversity into the core of UW Colleges and UW-Extension's operations.
2. OWED should develop a formal diversity volunteer management system.
3. Prioritize conducting a national search for a new Director of the Office of Workforce Equity and Diversity.
4. Re-organize OWED in terms of staff and financial resources.
5. Develop recruitment and retention expertise systemwide.
6. Develop a systemwide mentoring program.
7. Develop a new systemwide Affirmative Action Plan.
8. Develop a systemwide Strategic Diversity Plan.
9. The Chancellor and Senior Leadership Team should participate in the Multicultural Awareness Training Program.
10. UW Colleges and UW-Extension should develop a systemwide diversity success model.

The challenge for UW Colleges and UW-Extension is to develop an unwavering commitment to implement these recommendations. As stated in the review report's conclusion, successful implementation of these recommendations promises "next level" diversity work recognition and occupying a designation as a higher education diversity best practice which others will use as a benchmark.

I. INTRODUCTION AND METHODOLOGY

The commission to launch this review report started with a telephone call from Dr. David Wilson, Chancellor UW Colleges & UW-Extension to the consultant on June 20, 2008. Dr. Wilson asked the consultant to consider preparing a proposal for approval to conduct an in-depth review of the Office of Workforce Equity and Diversity (OWED). The recent departure of OWED's Director provided a brief window of opportunity to examine the unit's effectiveness in meeting the expectations of both UW Colleges and UW-Extension. The fundamental goal for the review would be to address how the central office in Madison could help both institutions achieve their diversity goals and aspirations. More importantly, how could OWED add value?

The following review report is based on the consultant's process of gathering data, conducting interviews, and the evaluation of key information provided by and through major stakeholders with UW Colleges, UW-Extension, and Madison's central office. For the purpose of this report, stakeholder is defined as anyone or group that benefits directly or indirectly from the unit's services in addition to being a unit partner.

Over 25 one-on-one interviews were conducted with UW Colleges, UW-Extension, and central office stakeholders. The interviews were conducted between July 28 and August 12, 2008. The interviews were arranged by David J. Prucha, Director, Human Resources, UW Colleges & UW-Extension. Included among those interviewed were representatives of UW Colleges, UW-Extension, employees in the Office of Workforce Equity and Diversity, members of the Chancellor's senior leadership team, members of the Committee on the Status of Women, members of the Diversity and Equity Council, and several Multicultural Awareness trainers.

Each individual/and or group was asked to respond to the following questions:

1. Is the mission of the unit clear, understood and appropriate? If not, how might it be improved?
2. What are the institutional needs of UWC and UWEX in the areas of equal opportunity, equity and diversity-including those required by an outside authority as well as programs initiated by the institution(s)?
3. What are the current services and activities of the unit?
4. Do current services and activities align with the mission of the unit and needs of the institutions? If not, what should be changed?
5. Are the resources (both people and dollars) allocated to the unit's current services and activities appropriate and adequate? If not, what is needed?
6. What best practices in higher education might inform the work of the unit?
7. What organizational configuration or structural options will best contribute to the effectiveness of the unit?

This review provides the Chancellor of UW Colleges & UW-Extension and the key stakeholders with information on how OWED has functioned over the past two years under the leadership of its former Director. The review sheds light on the scope of the Director's position in addition to the most effective organizational structure to serve the diversity needs of a large complex integrated system. Furthermore, the review provides critical information that should be used as a guide/suggestive steps to conduct a thorough and timely search for a new Director for the Office of Workforce Equity and Diversity.

Following this introduction is a strengths, weaknesses, opportunities, and threats (SWOT) observations section. Next, the review captures the general and specific responses to the seven (7) predominant questions that drive this review. However, these questions are suppose to open and not end the important discussion regarding the Office of Workforce Equity and Diversity, the role of the Director, and systemwide (defined as UW Colleges and UW-Extension) diversity.

The next section of this review highlights emergent themes. These themes are a joint effort between my willingness to conceptually dig deeper into a newer model of diversity related terms and the brilliant insights of numerous individuals working in a complex higher education system.

Next, the review identifies ten (10) recommendations that I believe UW Colleges and UW-Extension must focus on to move diversity forward and re-engage a unit that is in a seeming “holding pattern”. Finally, the review ends with a conclusion that walks the reader through what has been captured in the review but at the same time serves as a final reminder that there is “business” to address.

II. SWOT OBSERVATIONS

Strengths

- Specialized Talents in OWED
- Compliance Expertise
- Multicultural Awareness Training
- Strong Diversity Leadership Volunteer Infrastructure (MAT, Committee on the Status of Women, Diversity and Equity Council)
- Proactive move by the Chancellor to re-think OWED and the Director's responsibilities

Weaknesses

- Lack of resources, both staff and money, to carry out mission
- Lack of mission clarity
- No Director
- OWED not connected to UW Colleges in terms of programming and service provisions
- Perceived by UW Colleges officials as a UW-Extension unit
- Unrealistic unit Performance Expectations
- Over reliance on the Director to be the unit's "Go To Person" in a large, complex, and complicated system infrastructure
- Members of the Chancellor's senior leadership team are unaware if OWED's current services and activities align with the mission of the unit and the needs of institutions

Opportunities

- Re-think, Re-tool, Re-Deploy OWED
- OWED as a lead unit in the integration process
- Hire a new Director who can balance on the tight rope of diversity leadership demanded by UW Colleges and UW-Extension
- Prioritize Diversity

- Brand Diversity
- Create a seamless system of inclusion, access, equity, diversity, and multicultural competence
- Create a CEO higher education best practice

Threats

- OWED competing with other priorities and initiatives
- Continuation of OWED's staffing and funding level
- OWED not appropriately networked within the state and beyond
- Decrease in volunteers' enthusiasm and support moving forward
- Not having a UW Colleges and UW-Extension understood and shared diversity mission
- Integration Performance Pressures

III. INFORMATIONAL ANALYSIS

Question 1: Is the Mission of the unit clear, understood and appropriate? If not, how might it be improved?

Chancellor's Senior Leadership Team:

Several senior leadership team members stated that the Chancellor is explicit in his charges and is very clear when giving directives. The Chancellor utilizes the website to assist with policy clarity regarding initiatives. However, in terms of leadership style, the Chancellor does not like to overstep his boundaries. It was mentioned that the Chancellor had high expectations for the former Director. Moving forward, the Chancellor wants a dynamic leader to direct OWED.

UW Colleges

Colleges reported that OWED's mission is not clear and that there is an obvious disconnect between the unit and the 13 campuses. It appears that numerous individuals associated with Colleges central administration never understood OWED's mission, and there is skepticism whether officials at the 13 campuses understood or viewed OWED as a resource. However, one College official who did read the mission offered the following insight:

“The mission is clear, however, I really feel that all HR personnel should be charged with this mission, not just a Director. I do not see the need for a separate person given the overarching responsibilities. This is like saying that multiculturalism should be taught as a separate course in the colleges curricula....it should be blended throughout the curricula.”

During interviews, it was expressed that a more direct and intentional effort has to be made by OWED to work with Colleges, especially since the campuses have never worked with a diversity office in the past. In the past, Human Resources always handled diversity issues for Colleges.

UW-Extension

One Extension respondent commented that:

“The mission is appropriate by responsibilities but not by the scope of serving 2 institutions.”

Another person commented:

“That the mission was appropriate when OWED was just serving Extension.”

There was complete consensus among Extension interviewees that the mission needs to be tweaked because the system is a changed system that has been going through a transformation process the past 10 years. Therefore, the mission needs to be refreshed because it is believed to be out of date. Interviewees stated that any discussion regarding mission clarity would be a huge improvement. One interviewee said:

“The mission is not understood on the streets among the rank and file.”

Many interviewees said that the mission of OWED is too narrowly focused on compliance-based issues. There was more understanding of the mission when OWED was a part of Extension. Interviewees stated that Extension had more access to OWED under the old system.

Not leaving anything to chance, the Division of Cooperative Extension interviewees floated a 2 page document among themselves to develop a **unified front** dialogue with the consultant on issues ranging from: 1. affirmative action planning and reporting, 2. recruitment, and 3. increase diversity of the workforce (the more exhaustive list of issues will be discussed in the Question 2 section focusing on needs).

Office of Workforce Equity and Diversity (referred to as the Unit)

As stated by someone within the unit:

“I am not sure what the mission is based on in terms of the former Director’s and Chancellor’s interpretation of the mission.”

Another unit member said that they’re not sure if there was a prepared mission for OWED. It was stated that for continuity purposes, the former Director made an earnest attempt to have meetings to create a culture of “team play”.

Like Extension officials, OWED members stated that there was more mission clarity within the unit when OWED was exclusively a part of Extension. During this period OWED educated Extension on:

- diversity
- equal opportunity
- compliance
- multicultural awareness training

It was acknowledged within the unit that prior to the central integration of the UW Colleges and UW-Extension, OWED’s focus was primarily compliance. The former Director made an honest attempt to engage the unit in broader diversity issues. However, they’re not sure if that message has appropriately gotten into the larger system.

Committees/Councils

This group of interviewees all agreed that OWED was overloaded with expectations. The biggest problem for OWED is mission vs. function question. Compliance issues watered down issues regarding advocacy and awareness. Collectively, these individuals stated that they are not sure where diversity fits in terms of the UW Colleges and UW-Extension’s priorities. An interviewee said:

“OWED does not have the support of the System (UW Colleges and UW-Extension) nor the Chancellor’s senior leadership team.”

It was suggested that diversity has not been made a part of everyone’s work. And potentially, the State Legislature is not committed to diversity. This led one person to say:

“System executives struggle to fight battles they can’t win.”

Question 2: What are the institutional needs of UWC and UWEX in the areas of equal opportunity, equity and diversity-including those required by an outside authority as well as programs initiated by the institution(s)?

Chancellor's Senior Leadership Team

This group of interviewees stated that for UW Colleges, the number one need is workforce development in the area of recruiting diverse employees. With respect to the 13 campuses, there needs to be a mandate for diverse applicant pools. One person suggested that the Chancellor should deploy strategic diversity maneuvers to increase diversity on the campuses.

In terms of Extension, members of the Chancellor's senior leadership team said a diverse workforce should take advantage of where people of color are located within Wisconsin. On the Extension side, there needs to be an innovative diversity mentoring program in place to retain and move people up in Extension's system. One interviewee went as far to say:

“Extension needs to be loosened up in terms of seeing the value of diversity.”

The senior leadership team had several combined institutions needs. First, they recommended that distance education opportunities in the classroom be expanded for both institutions. Second, affirmative action and equal employment opportunities compliance plans and reports be upgraded within the system. Special attention needs to be directed at reporting to the federal government and the State of Wisconsin. Third, continue multicultural awareness training (VISIONS Model) and design additional programs across the institutions to keep the momentum going. Fourth, both UW Colleges and UW-Extension need to establish institutional definitional understanding of affirmative action, equal employment opportunities, and diversity as part of a unified learning system.

UW Colleges

Officials representing Colleges believe that faculty diversity is the most important need at this time, especially in terms of racial and ethnic diversity in addition to gender diversity. This expressed need is part of a large need to cast the broadest possible net for faculty, staff, and students.

In terms of a diverse student population, one interviewee stated that answering the question of how Student Services builds relationships is important to not only recruitment but the retention of diverse students on campuses. Another interviewee said that Colleges needs to:

“Rectify the problem of struggling to attract African-American students to UWC opportunities.”

There was consensus among those interviewed that none of the needs would be met without the appropriate funding to adequately resource each need. In terms of Extension, one UW Colleges official commented that the most important need was the maintenance of Extension’s reputation, history, and tradition with diversity. With particular focus on combined needs, a UW Colleges interviewee enthusiastically said:

“Both institutions need a label/brand/tag line like Inclusive Excellence.”

This individual believes the system needs a broad diversity initiative and or program as part of a clearly articulated vision from the Chancellor.

UW-Extension

As stated earlier in this review, Cooperative Extension Extension officials circulated a shared document of needs in preparation for their interview sessions. The major needs listed on the document were:

1. Affirmative Action planning and reporting

2. Institutional leadership for UW System Plan 2008
3. Equal Employment Opportunity training for all new Cooperative Extension employees and for supervisors
4. Affirmative Action and equal opportunity expertise on personnel issues/complaint investigation
5. Building a respectful workforce
6. An Office of Workforce Equity and Diversity legitimate work Team
7. Multicultural Awareness Program
8. Recruitment to Increase Diversity in the Workplace

UW-Extension's institutional needs go far beyond the aforementioned expressed list of items.

Several interviewees stated that diversity should be a recognized part of what Extension does and diversity should be a major part of the overall business case for both institutions (UW Colleges and UW-Extension).

Extension officials believe that OWED needs to connect with Extension Division directors to improve the clarity around hiring goals, increase cultural competence, create a culture of pluralism at the highest level of the organization, and have a profound impact on local decision makers statewide on the issue of diversity. As one person put it:

“OWED needs to do things to hit people on a personal level.”

It was mentioned that there is a need to focus on the capacity of key Extension staff to:

- A. Understand the importance of diversity
- B. Do The Right Thing
- C. Listen to the voices (varied constituents and stakeholders)

Office of Workforce Equity and Diversity

OWED respondents mentioned that the greatest institutional needs are located with UW Colleges. They believe that it is important to work with UW Colleges staff in terms of full diversity integration and that professional development statewide among UW Colleges faculty and staff is crucial.

OWED staff believes that it is important to outreach to UW Colleges on issues such as diversity, compliance, EEO/Equity Education and to assist Colleges with coming into compliance. In terms of UW Extension, OWED staff stated that it is important to make sure that the Affirmative Action Plan is implemented and that Extension engages the office more regarding compliance matters.

OWED respondents stated that the Chancellor should use the MAT component as a blueprint for how system integration should unfold. These respondents believe that there is a need to clear up the perceived ambivalence between UW Colleges and UW-Extension. Furthermore, both UW Colleges and UW-Extension should do their homework and participate in more research based diversity programming (best practices) while focusing more broadly in terms of diversity programs and activities.

Committees/Councils

In terms of UW Colleges needs, this group of interviewees stated that hiring a more diverse workforce was the number one issue. It was suggested that Colleges should ensure more accurate compliance reporting and be amenable to more open communications regarding diversity, especially with the staff of OWED. On the other hand, this group suggested that

OWED seriously take advantage of the fact that the entire system is ready to respond and engage the Office of Workforce Equity and Diversity.

With respect to UW Extension needs, representatives from Committees and Councils stated that Extension needs a dynamic system of rapid response to complaints and to hold hearings to successfully work at remediation. OWED can play a much more important role in Extension by being readily available to help all Extension units. These interviewees stated that the most desired help is in advising search and screen committees and helping with attracting women and people of color to employment opportunities within Extension.

This group of interviewees suggested that both UW Colleges and UW-Extension move from a model of diversity learning to diversity action. It was also mentioned that great things could be accomplished by identifying the “real diversity troops” (individuals who openly demonstrate support for diversity) in the system and properly putting them to work. For these troops, it is important to adequately project the small wins along the way and to elevate within the system a diversity project that has sustainability and recognizable impact. Lastly, it was mentioned that a real system focus should be directed toward hiring and retention strategies. Someone commented that the system is currently operating without tangible strategies in these areas.

Question 3: What are the current services and activities of the unit?

Chancellor's Senior Leadership Team

This group of interviewees was highly complimentary of the unit's multicultural awareness training components. One interviewee commented that one of MAT's greatest attributes is the involvement and training of white males in the program. The senior leadership team also acknowledged that OWED does a lot of work with women's issues in addition to opening up various venues for voices to be heard that have not been heard in the past. Also, this group of interviewees stated that the unit is involved in services and activities related to legal matters, issues dealing with the American with Disabilities Act, and consultation.

UW Colleges

Several UW Colleges officials said that they were unaware or not sure of OWED's current services and activities outside of EEO/AA and MAT. One Colleges official said that they had read the Director's job description, but was unable to say if any of the responsibilities were actually carried out. As they stated:

"I had little to no contact with the former Director."

Another person did respond by saying that the Diversity and Equity Council is a recognized part of the unit's activities. However, they also said that there are too many Extension representatives on the Council and not enough Colleges representatives. As it stands, this situation has been perceived by UW Colleges as a real imbalance.

It was stated that the former Director of the unit served as a consultant on matters involving personnel issues, meeting with hiring committees, advising on procedural matters and even advising on some workforce development issues. Before the Director's departure, she

assisted both UW Colleges and UW-Extension with attempting to establish a fair and equitable work environment.

UW-Extension

ADA advice and coordination by OWED was considered the highlight by Extension interviewees. Extension officials mentioned the following as recognizable OWED services and activities:

- Summer Affirmative Action Internship Program
- Diversity circles as next steps coming out of MAT
- ADA advice
- Committee on the Status of Women and Diversity Council oversight

Office of Workforce Equity and Diversity

Looking within its own mission, the unit believes that the system is aware of MAT, complaint/investigations, affirmative action planning, ADA assistance and care management, and additional training (example-training on Islam by the ADA coordinator). Unit members also believe that there is system awareness in terms of OWED's Diversity and Equity Council and movement into a strategic planning process that identified workgroups.

Committees/Councils

This cohort of interviewees seemed to be primarily focused on OWED's involvement specifically with the Diversity and Equity Committee and the Committee on the Status of Women. They did state that the unit is known for compliance related work and MAT (active training) activities. There was some mention of the development of "**Study Circles**" which involves individuals within the system in terms of reading, studying, and discussing important diversity issues.

Question 4: Do current services and activities align with the mission of the unit and needs of the institutions? If not, what should be changed?

Chancellor's Senior Leadership Team

The only comment from this group is that there is a five year rolling strategic plan for UW Colleges and UW-Extension.

UW Colleges

The majority of UW Colleges officials said that they do not understand the mission of OWED and are therefore unable to adequately answer this question. Furthermore, they did not understand the nature of the former Director's work, especially what the Director was involved in and how that person connected with UW Colleges. One official stated that the mission's overall philosophy should be adopted by all university personnel. As they see it:

“With the exception of diversity training programs, which should be offered on an annual basis, the rest should be handled at the campus and department level.”

UW-Extension

There were ranges of responses from this group. Some stated that alignment was good based on the on-going MAT program and ADA activities. The Director's job and job description appear to align with institutional needs. One interviewee stated that the Summer Affirmative Action Internship Program (SAAIP) is effective for Broadcast and Media Innovation (BAMI).

Office of Workforce Equity and Diversity

While, it was mentioned that staff meetings were an attempt to see what work was being done across the institutions, the overall feeling is that OWED has just been doing what it wants

without a really clear mission and plan. One member in the unit stated that they were unaware of what the former Director was doing. Another OWED member said that the former Director was making significant steps in terms of working across the institutions.

It was also pointed out by a unit member that the compliance activities/work gets in the ways of the diversity work. As stated:

“Sometimes compliance creates adversarial scenarios.”

Committees/Councils

This group of interviewees were unanimous in their responses that OWED’s resources was the ultimate determinant in terms of real alignment. The core belief among this group is the lack of resources within the unit only allowed OWED to achieve up to a certain point.

Question 5: Are the resources (both people and dollars) allocated to the unit’s current services and activities appropriate and adequate? If not, what is needed?

Chancellor’s Senior Leadership Team

“The unit has been operating like a spare tire on a car.”

According to the above comment, the senior leadership team believes that the office is under funded and neither the existing staff nor the dollars are adequate for the service demands placed on OWED. According to one interviewee, the existing budget is the same budget that existed when the unit was exclusively operating under UW Extension. Therefore, the budget does not reflect diversity as a legitimate integration activity. It was mentioned that the Chancellor provided some additional funds for travel and lunches specifically targeted toward the Diversity Equity Committee.

One of the Chancellor’s senior leaders stated that someone will really have to do a great assessment of OWED and the Director’s responsibilities, possibly two (2) assessments which includes (this report and an independent assessment by the next Director).

Members of the senior leadership team said that the Chancellor has a huge job across both institutions. Therefore, the enormity of the job and the departure of the former OWED Director forced the Chancellor to re-think OWED. It was also mentioned during an interview that there might be perceived tension between the central office and local institutional offices (i.e., Colleges and Extension) on diversity infrastructure, programming, and services.

UW Colleges

Officials with Colleges struggled with this question and the majority stated that they didn’t know or they were not sure what a response should be to this question. One interviewee asked:

“Does the budget reflect the priorities of academic affairs?”

Yet, another interviewee suggested eliminating the Director's position and spreading the duties and responsibilities across Human Resources. It was stated that someone needs to do an assessment of UW Colleges activities and infrastructure and then share that information with OWED. Furthermore, it was mentioned that the Chancellor's office should put money behind activities that matter. That same interviewee stated that MAT seems to be one of the priorities that matters.

UW Extension

There was consensus among Extension officials that OWED was under funded, under resourced, and that the office had to operate basically with limited funds. Extension officials agree that OWED needs more staff to accommodate high institutional/system demands. This problem was amplified by their assertion that once UW Colleges was added to the former Director's plate it immediately caused serious logistical issues for the Director. Not only was the Director overwhelmed with UW Colleges as a major added integration piece but several Extension officials stated that these new arrangements really pushed the limit of a "one person" shop. On the other hand, it was stated that OWED never utilized the human resources representatives at UW Colleges nor UW-Extension appropriately.

Extension believes that OWED has to view the diversity work that it is doing as both **wide and deep**. Also, an Extension official stated that the new Director will need to be indoctrinated in institutions' policies and procedures in order to navigate the terrain.

Other comments made by Extension officials focused on suggesting that a volunteer management system be established. According to these officials, OWED has a large volunteer group consisting of MAT Trainers, a Diversity and Equity Council, a Committee on the Status of

Women, and Action Teams across institutions. It is roughly guesstimated that the unmanaged system of volunteers is around 70 plus individuals.

Extension officials also mentioned that resources should be appropriately allocated to update the website which they believe is woefully out of date. There were other resource allocation suggestions like more resources for the Committee on the Status of Women and the Diversity and Equity Council in addition to providing more resources to fund Phase II of the Multicultural Awareness Training program. Also, in terms of MAT, one interviewee suggested that the MAT Coordinator Model be preserved.

Office of Workforce Equity and Diversity

Individuals within the unit expressed a strong need for more resources for on going support activities such as Phase II of MAT (second cohort of trainers), compliance related work , money for speakers' honorariums, money for volunteer expenses, resources for the WisLine Audio Conferencing Services, and resources to be able to reach large numbers of individuals across the State of Wisconsin on important diversity issues. Among this group, there were some interesting comments. For instance, more than one person said that OWED has enough staff to do the work even with the added service demands of reaching out to UW Colleges needs. Also, there is a certain comfort level in working with UW Extension by unit personnel because they believe that Extension is more fluid as an organization when compared to Colleges and that Extension traditionally is accustomed to working with unit staff members.

Committees/Councils

These interviewees stated that more dollars should be targeted toward the Diversity and Equity Council and the Committee on the Status of Women, especially money to travel to meetings.

This cohort also recommended to continue and even expand the MAT Coordinator Model. The group recommended adding one half position focusing primarily on multicultural awareness training and, to continue the work of the ADA specialist. The following specific organizational resources were suggested:

1. A re-tooled FTE for:
 - investigation
 - compliance
 - reporting
 - remediation
2. A re-created/new FTE for:
 - assisting with recruitment and hiring
 - staffing committees
 - employee training

Additional resource allocation to address special concerns of committee/council representatives consisting of:

- work with committees/councils to make things happen (i.e., money to put plans into action)
- engage in awareness campaigns and workshops
- train UW Colleges and UW-Extension staff
- move into strategic areas
- conduct meaningful diversity research
- buyout time for people to participate in real committee work

- upgrade OWED's website
- tools to gather data, and
- consult with individuals who have strong data interpretation skills

Question 6: What best practices in higher education might inform the work of the Unit?

Chancellor's Senior Leadership Team

“Executives have to be able to walk the professed/and rhetorical values.”

This interviewee was not alone in the above sentiment. Others on the Chancellor's senior leadership team stated that top administrators need to participate in MAT if they are going to ask other employees to participate. One interviewee shared this idea:

“The Leadership Institute on UW Madison's campus would be a good model for institutions to replicate.”

In terms of unit specific issues, an interviewee stated that they were concerned that the former OWED Director did not appear to attend enough national and regional networking conferences and workshops. An apparent lack of external exposure could be directly linked to a perceived lack of innovations and creativity coming out of the unit.

UW Colleges

Several of the officials interviewed representing Colleges provided many insights into best practices in higher education that might inform the work of OWED. The most salient insights were: (1) do a real self assessment about what are the needs of UW Colleges and UW-Extension; (2) take a hard look at what UW Colleges does; (3) identify the needs of the faculty; (4) provide search committee chairs with updated best practices and point them to the relevant literature reviews; (5) answer the key question of why students come and stay at the 13 campuses (special focus on economic first generation).

One official with Colleges said that maybe UW-Extension's experience with Multicultural Awareness Training (MAT) is a best practice. Another official suggested that the Chancellor should seriously look at adopting a tag line like "Inclusive Excellence" as a best practice model. The same interviewee recommended that Colleges develop a mentality for hiring and working with search committees with the "work of learning organizations" as a platform.

UW-Extension

Several Extension officials stated that UW-Extension has a unique mission. However, according to them, OWED never understood Extension's mission and never really collaborated. As one Extension official pointed out:

"OWED came across as an Ivory Tower."

Another Extension official stated that OWED never embraced a customer service orientation. According to them, customer service has never really been a part of the unit's operating culture.

In concert with a UW Colleges interviewee, Extension officials stated that the desired best practice is to be prepared to learn from what has already been done and then change. Several of the Extension officials interviewed suggested looking at comparable functional units, people, divisions, and states (meaning other land grants), and examine what is working as best practices. Among the land grants that might offer replication potentiality include:

- University of Minnesota
- Iowa State
- North Carolina

- The Ohio State

One of the Extension interviewees strongly recommended that UW Colleges and UW Extension closely examine the leadership and role responsibilities of Cathy Lechman at The Ohio State University in terms of what to look for in a new Director. Even though the Lechman model of leadership responsibility is exclusively Extension, there were several aspects of her leadership that was noted as worthy of paying special attention to:

- 1) being very visible
- 2) her work has mission clarity
- 3) she is outspoken in terms of the mission
- 4) she is not afraid to speak her mind
- 5) understands the importance of education and professional development when it comes to Extension's workforce

Another key Extension view in terms of best practices suggested expanding the search for "ideal models" to look at what has worked in the private sector. An Extension official said that some private sector companies have done a good job of embedding diversity into their operating cultures. This person also stated that UW Colleges and UW-Extension could learn from the active and effective diversity/pluralism efforts of Good Year, JP Morgan Chase, Kraft, etc. It was also mentioned that Deloitte & Touche's mentoring program be a point of reference as a potential best practice.

Office of Workforce Equity and Diversity

As one interviewee from this group shared:

"The best representation of a best practice is a look at some of the on-going system committees. They seem to showcase a diversity of who participates."

Another unit member recommended looking closely at Taylor Cox's work in terms of institutional change. Cox's research examines all institutional practices such as administrative goals and philosophies, personnel, promotions, and etc. The Cox suggestion is another clarion call to go "research based" in looking at diversity programming within the system.

Committees/Councils

Again, using diversity to develop system learning communities was the predominant discussion among committees/councils representatives. This cohort of interviewees suggested that the "best" of the best practices was wide/deep diversity learning opportunities; professional development, and information sharing model. As one official stated:

"You got to know what is working in the external world and link up to those best practices."

One of the groups interviewed specifically stated that in order to put "real wheels" on the diversity effort, make sure that the messages coming down from the top (meaning, the Chancellor's office) are direct and clear. Among some of those messages are: (1) equal pay; (2) resources for strategic initiatives; (3) MIT and (STEM) Study; (4) implementation of strategic initiatives.

Another important strategy to explore is to look inside the institutions to see who is doing successful grant writing in order to access grant funding to support large diversity initiatives. This would be part of a much larger strategy to learn how to access the human capital inside UW Colleges and UW-Extension and put it to work on behalf of diversity.

It was suggested that OWED look at branding/marketing the work of the Diversity and Equity Committee. This could be achieved by circulating timely and updated information regarding the Committee's activities. Also, it was mentioned that it is important for the new Director to understand budget issues in higher education.

Question 7: What organizational configuration or structural options will best contribute to the effectiveness of the unit?

Chancellor's Senior Leadership Team

The majority of the Chancellor's team said that the new Director needs to be a direct report to the Chancellor. There is belief among this group that the existing staff in OWED are open to a fresh start with a new person. One of the interviewee's stated that there needs to be clarity in the office in terms of who is doing what, especially the duties and responsibilities of the Director. Another interviewee said that OWED needs an office space area that contains all of the people in the unit. In their opinion, this would demonstrate evidence of potentially becoming a learning community. And, the unit should focus on diversity, access, and opportunity. It was also mentioned that the new Director should take advantage of the specialty skills within the unit.

UW Colleges

“Go Slow”

According to the above response, Colleges want the new Director and OWED to take some time and learn the cultures of both institutions. In order to achieve this, it was recommended that the new Director do an initial emersion in which they would:

- make an attempt to meet a lot of people in the system
- ask everyone to provide insight into what the Director's role should be
- ask key individuals what advice they would give in order for the Director to be successful, and
- establish their presence as a recognized system leader

It was mentioned that it is very important for OWED's staff to be formally introduced to decision makers in both institutions. In terms of Colleges, it was recommended that the unit interface and collaborate with ADA, employee assistance coordinators and human resources officials at each campus. As stated by one College official:

“There needs to be a College Go to Person in the unit below the Director.”

The ideal go to person would either be someone new to the unit or an existing unit employee who would have to go through heavy re-training.

The prevailing belief among Colleges officials is that in order for OWED to be successful the unit has to be networked on all 13 campuses. There is a consensus among those interviewed that this type of structure would allow more people to get on the band wagon and the unit would also achieve greater buy-in as it relates to its services. As one person put it:

“This type of structure would get the train moving.”

However, not all officials want to get a train moving with OWED and especially with its Director. Again, one Colleges official believes in eliminating the Director position altogether to re-direct resources to ensure that all HR personnel are trained to comply with federal and state laws. For them, it is more important to have access to a competent attorney to provide needed legal advice as opposed to someone trained to lead in diversity issues.

UW-Extension

As a unified cohort of interviewees, Extension officials want a clarified mission for OWED, an established system wide comprehensive vision for diversity, and a structure that is wrapped around crucial priorities. The desired structure is one that will be reflective of the integrated system.

An Extension official stated that it was important for the unit and the new Director to report directly to the Chancellor. However, there is tremendous concern about a “one person” shop meeting the needs of both UW Colleges and UW Extension. There was a chorus of sentiments from Extension officials recommending creating a Deputy Director position that would serve as a liaison specifically for Colleges. This Deputy Director would be someone who would totally focus on Colleges needs. The same interviewee recommended that this position be responsible for Affirmative Action activities and services in the unit and also bring to the table significant uniting skills.

There were a couple of Extension interviewees who countered with a different Deputy Director position. Their desired position is more of a department manager/operations person who would be responsible for EEO training, serving as the MAT Program coordinator, and be responsible for workforce development with specialized skills, talents, and experiences in recruiting a diverse workforce. It was suggested that this position work closely with Extension’s human resources Division Directors.

Office of Workforce Equity and Diversity

There is consensus within the unit that OWED and its Director should report directly to the Chancellor and that unit and Director must be in touch with both institutions. One unit member commented that:

“OWED must be seen as a real separate unit for appearances of impartiality.”

As explained by this individual, people within the system should feel comfortable interfacing with the unit on major issues of diversity without the fear of retaliation, lack of confidentiality or

insensitivity on the part of OWED. The unit should have the reputation of being an “environment of respect and concern”.

Within the unit, there is awareness of the importance of further nurturing a positive relationship with the Diversity and Equity Council. A unit member stated that the Council was helping the unit to inform institutional units and establish itself as an assessment arm of OWED. With this in mind, it is important to have a staff person that can work with the Diversity and Equity Council. Furthermore, it is really important for OWED to continue to empower and support the Council.

Another interviewee commented that the Multicultural Awareness Training component of the unit is the most effective when VISIONS is actually doing the training. On the other hand, this individual said that the VISIONS model might not be the best diversity training to align with the current integrated system model. As stated, the model does not provide longitudinal data, lacks follow-up, lacks accountability, and should engage in training beyond race like equal opportunity and the status of women.

Committees/Councils

This group suggested that OWED take on a centralized office look. It is believed that this will achieve the perception that there is a legitimate core group of people that work out of the same office. Furthermore, this new centralized office look should build on the idea of a learning community within the group in addition to creating visibility for OWED.

It was strongly recommended during these interviews that communication coming out of OWED get to all UW Colleges and UW-Extension channels and arteries.

An interviewee in this group also stated that every UW Colleges campus should reinstate their diversity committee. However, this recommendation might meet resistance from some members of the faculty due to feelings of being overburdened with committee work.

IV. EMERGENT THEMES

1. Operational Diversity Agility

This theme requires OWED and the new Director to both lead and manage diversity at every echelon across institutions. Operationally, it is crucial to understand the Chancellor's intent, especially unit mission clarity. Second, it is important to move diversity from goal to necessity through the process of collaboration planning. This will allow OWED to cultivate mission partners. Third, building a seamless communication infrastructure of information sharing at all levels is vital. Fourth, across institutions, there must be a shared vision for diversity. Seeing through the same lenses is an important component of going from "Good to Great". Fifth, OWED must orchestrate a synchronized proclivity to act on important diversity initiatives.

2. Wide and Deep

In order for OWED and its new Director to achieve success it must develop a culture of engagement that is both horizontal and vertical. Looking at diversity from a wide view will insure UW Colleges and UW-Extension officials that the diversity strategy is grounded in the entire State of Wisconsin and beyond. This state and "world view" will be distinguished not only by individual and organizational relationships but evidenced by the territory covered, wide stretch of impact, and broad stroke of influence. In terms of deep, this idea posits around the reality of what gets prioritized gets done. Here, deep impact is the result of real time involvement and action focused on the identified needs and priorities across the institutions. It is important for OWED to focus on those activities that really matter and utilize assessment as a tool to ensure a tight and keen focus.

3. Results Oriented Diversity

Implementing diversity goals and initiatives systemwide is not only key for OWED but it is equally important for the Chancellor's success in terms of integration. Noticeable and memorable success will be evident in the form of different behaviors, different forms and levels of engagement, different decision making processes, different results, and different policies.

4. Diversity Pacing

Diversity is not a fly by night nor one time operational cultural additive. Therefore, to make it work, pacing is essential. First, the new Director has to pace themselves to avoid accelerated job burnout. Then, they have to pace the organization, its key decision makers, constituents, and the initiative. The key is to understand that diversity is a **marathon** and not a **sprint**.

5. Value Added Diversity

Results from the Informational Analysis section of this report show that there is major agreement among stakeholders that OWED must be seen as positively impacting the constituents it serves. OWED must be recognized as an active player in systemwide relationship building, and develop a process to establish and leverage strategic alliances for mutual benefit. There were several interviewees in all of the various cohorts that stated a need for OWED to demonstrate evidence and impact of ongoing diversity awareness and education, workforce development, inclusivity and access to UW Colleges and UW-Extension opportunities, and taking the lead in systemwide empowerment initiatives. At the end of the day, OWED is accountable for improving the quality of workplace and educational life within the system.

V. RECOMMENDATIONS

The following recommendations emerged from the interviews and from the consultant's experience and expertise in analyzing complex systems.

Recommendation 1

The culmination of the interviews points to integrating diversity into the core of UW Colleges and UW-Extension's operations. Making diversity a central strategic imperative is critical if the Chancellor's commitment to the goal of access is to be realized. As a core operating imperative, diversity must operate with a clear mission that is understood across institutions. It is important to appropriately brand diversity as well as prioritize diversity without it competing with other system priorities. The ultimate goal is to create a seamless system of diversity.

Recommendation 2

In order to broaden the impact of the Office of Workforce Equity and Diversity, it is recommended that the unit develop a formal diversity volunteer management system consisting of clarified expectations, job descriptions, accountabilities, and assessment. A formal system will increase OWED's performance and efficiency and retain the enthusiasm of existing diversity advocates/volunteers throughout the system.

Recommendation 3

The dialogue with the interviewees seems to prioritize conducting a national search for a new Director of the Office of Workforce Equity and Diversity. On numerous occasions, interviewees commented that OWED is currently operating without a "leader". In addition, several

individuals mentioned that the overall diversity effort was operating without a leader. The void left by the recent departure of the former Director is viewed as a detriment to UW Colleges and UW-Extension operations. Due to breadth and depth of leadership responsibility, the consultant recommends elevating the position to that of Vice Chancellor of the Office for Workforce Equity and Diversity. The magnitude of leadership responsibilities encompassing 13 campuses and an Extension system covering the entire State of Wisconsin is a much larger role than any other Chief Diversity Officer position in The University of Wisconsin System. The following characteristics, skills, and credentials were suggested during the interviews:

Characteristics

Confident

Creative

Team player

Honest

Balanced

Positive

Quick on their feet

Catalytic

Inspiring

Strategic Thinker/Futuristic Thinker

Personal Integrity

Take Charge

Straight talker

Patient

Relationship Builder/Coalition Builder/Networker

Comfortable with own expertise/comfortable in own skin

Change agent

New nuanced leader

Wall the Talk

Persona of a top level administrator

Skills

Work with people who are behind the curve (both unit and Institutions)

Political savvy

Excellent manager/can manage staff

Can sell themselves

Can wear a “transition hat”

Understands integration

Strategic planning

Super infrastructure conscious

Knowledge of a lot of different elements

Tightrope walker

Grapple with reality

Analytical ability

Practices reciprocal trust building, especially with the Chancellor’s staff

Culturally adaptable

Can connect with Human Resources

Can expand UW Colleges and UW-Extension's best practices

Guard the priority (diversity)

Knows how to implement

Sees diversity broadly and not just as race

Can cultivate and rely on unit (OWED) expertise/can manage multiple skills sets

Knows how to create an empowering culture

Knows how to take advantage of "fresh start opportunities"

Is a master of the wide/deep concept

Commands respect

Knows how to be visible

Can develop close working relationship with both Provosts

Credentials

A diversity scholar (writes and sends things out)

Know the VISIONS processes/and or be willing to learn

Legal training

Extension experience

Diversity expert

Community asset mapping expert

A reputation and history of building diversity in staffing, especially in their own units

Experience in adult education

Ph.D. or an Ed.D.

Recommendation 4

An emergent and key finding from the interviewees suggests that the Office of Workforce Equity and Diversity be re-organized in terms of staff and financial resources. Given the enormity of the unit's expected scope of involvement and performance expectations I would recommend a significantly greater budget. Several things must be taken into consideration:

- A. The unit is expected to be networked on all 13 UW College campuses. The existing budget was developed without Colleges being a major operational service constituent of OWED.
- B. There is tremendous support/advocacy coming out of the interviews recommending the expansion of the Multicultural Awareness Training component, especially to Colleges. An upgraded budget will need to realistically address this expansion.
- C. Constituent groups (i.e., Diversity Council and the Committee on the Status of Women) want more resources targeted towards them to expand their activities and overall impact on diversity. Resource enhancement/upgrades for these groups should be seriously thought through in terms of what is needed to enhance a much larger systemwide Volunteer Management System.
- D. The new budget will need to reflect the value of the new Director's role responsibilities. The Chief Diversity Officer's position for UW Colleges and UW-Extension is functionally like no other CDO position in higher education. It is my belief that to properly compete nationwide to attract the best possible leader for this position will take a competitive salary. The position must also be supported with a flexible budget consisting of discretionary resources to connect with existing and ongoing diversity activities but to also provide seed money to jumpstart new initiatives.
- E. The interviews revealed a need for the creation of a new high level administrative (Deputy Director) position within the unit that would be second in command under the Director.
- F. Even if each existing position in the unit is re-tooled, there will be a need for an additional administrative assistant position to support the increased service demands of the unit.
- G. The demand for a much more exhaustive and comprehensive workforce development infrastructure requires a commitment that is not a part of the unit's existing budget.

Recommendation 5

The need to develop recruitment and retention expertise systemwide was a constant theme throughout the interviews. More importantly, every unit systemwide should be held accountable for diversity recruitment and retention. The creation of a sustainable inclusive diverse culture across institutions is dependent on hiring the best talent with particular attention directed toward UW Colleges. There were numerous discussions with interviewees regarding the need for UW Colleges to develop a legitimate diverse candidate pool of applicants, especially for campus Dean level positions. Sentiments were high regarding this level recommendation due to perceived so-called missed opportunities to hire a person of color at the Dean level in recent searches. It was suggested that UW Colleges and the central office work with diversity focused executive search firms to achieve different results in the future. Across institutions in general it is important to build meaningful networks through proactive community outreach to access diverse talent and expertise.

Recommendation 6

In keeping in concert with the aforementioned recommendation, a robust sustainable inclusive seamless system can be further enhanced by developing a systemwide mentoring program. Like other complex organizations, higher education organizations face daily competitive challenges to retain productive talent. Often times, organizations that fail to cultivate, groom, and intentionally create **intrapreneurship** opportunities for employees lose them to organizations that practice the new buzz term of “accelerated employee portfolio development.”

Recommendation 7

In order to ensure compliance with the federal government, it is recommended that UW Colleges and UW-Extension develop a new Affirmative Action Plan.

Recommendation 8

Results from the interviews show the need to develop a Strategic Diversity Plan. A well written clearly articulated Strategic Diversity Plan serves several purposes:

1. Serves as a powerful business case for understanding the legal compliance issues addressed in an Affirmative Action Plan.
2. Organizational shared vision (deep and broad)
3. Major tool in the Chief Diversity Officer's "Tool Kit"
4. Road map to change
5. Transformative Covenant

Recommendation 9

To secure buy-in and legitimize the diversity initiative, it is recommended that the Chancellor and his Senior Executive Leadership Team participate in the Multicultural Awareness Training Program. The "Giving and Taking of Orders" as it relates to diversity is contingent on evidence of recognized diversity advocates at the top who have demonstrated a balance between "talking the talk and walking the walk."

Recommendation 10

In an effort to increase the Office of Workforce Equity and Diversity's performance and efficiency, it is recommended that UW Colleges and UW-Extension develop a systemwide diversity success model. The steps of this model are as follows:

Re-organization (FY 08-09)

- Reviews the consultant's assessment report
- Re-organize OWED
- Hire a new unit leader-Vice Chancellor for the Office of Workforce Equity and Diversity

Operational Diversity Readiness Development (FY 09-11)

- New Vice Chancellor's Assessment of Institutions
- System Buy-In For Key Stakeholders
- Chancellor's Senior Executive Team Diversity Training
- Compliance Reporting (Affirmative Action Plan) Development
- Strategic Planning (Strategic Diversity Plan) Development
 1. Understanding the Chancellor's Intent (Mission Clarity)
 2. Shared Vision (one band, one sound "Drumline")

Integration (FY 11-12)

- Synchronized Proclivity to Act
- Seamless Diversity System (unconscious success)
- Catalytic toward the attainment of UW Colleges and UW-Extension goals

VI. CONCLUSION

This review has successfully fulfilled the objectives as outlined in the project scope in the proposal dated July 22, 2008 to the Chancellor of UW Colleges and UW-Extension. The review is the result of one-on-one interviews with key stakeholders representing Colleges, Extension, stakeholders provided vital information to move a troublesome issue (diversity) and position it to be a strategic weapon in the integration arsenal.

First, institutional change only happens when a realistic snapshot of organizational dynamics is available. The SWOT Analysis section prepared the reader to open up and try to understand the difficulties of an under-resourced unit operating in a demanding service environment.

Second, the Informational Analysis section displayed a robust dialogue of frank and honest reflection about the work of OWED and it's Director. The individuals that were interviewed spoke with clarity, insight, and displayed a keen sense of what's possible.

Third, UW Colleges and UW-Extension have the unique opportunity to create a diversity ethos. However, it will need to be anchored by a common language and communication nuance that has fluidity of transmission, understanding, and response. The emergent theme section is the beginning of expanding a common communication channel for institutions in addition to cementing needed legitimacy for a unit desperate for respect and purpose.

Fourth, the issues identified throughout this review are not exclusive to only UW Colleges and UW-Extension. And with that in mind, anyone serious about doing "next level" diversity work within any higher education organization or marketplace sector can read this review and intelligently visualize potential "goodness of fit" similarities. However, the uniqueness of UW Colleges and UW-Extension's infrastructure, mission, and impact on higher

education in Wisconsin and beyond make the recommendations take on the form and texture of a Hong Kong tailored suit – for institutions only.

Furthermore, a key advantage of this review is that it is a formalized discussion of diversity in a higher education system with changing constituencies and expanding performance demands. Couple these performance demands with the pressure to accomplish “more with less” and you have a situation that is destined for trouble. Yet, for the Office of Workforce Equity and Diversity, the ultimate goal is “superior” performance regardless of challenges. Consider six (6) lessons learned revealed by this review:

1. Under-resourced units often perform well below their potential.
2. Chief Diversity Officer needs the appropriate tools and support to be successful.
3. Units with unclear missions never fully cultivate mission partners.
4. Organizational change does not come quickly.
5. OWED can't make it happen with the current infrastructure.
6. The current system sees diversity as a goal and not a **necessity**.

The findings in this review, if taken seriously, will elevate UW Colleges and UW-Extension to the level of a diversity best practice where others will be wanting to learn from their experiences. However, this will not happen unless recommendations are implemented to their fullest.