Engagement, Inclusion and Diversity Plan - 2014 Update

Facilities Planning and Management

December 1, 2014

Our Vision

An inclusive and diverse team, working together to provide exceptional service for our university community

FY15 Engagement, Inclusion and Diversity Plan – Table of Contents

Section I. Introduction & Background

When the Division of Facilities Planning & Management (FP&M) embarked on its formal EID journey in 2012, it was the first time the division had created a comprehensive, organization-wide initiative to advance the principles of engagement, inclusion, and diversity in a unified, cohesive manner. While not intended to discount previous efforts, in hindsight, it is clear that the EID initiative marked the beginning of an exciting new era at FP&M. The initiative set a goal to fundamentally change the organizational culture, no small task, given the size and somewhat decentralized nature of FP&M, a division comprised of approximately 1,200 employees operating out of six departments in addition to the Office of the Associate Vice Chancellor:

- Campus Planning and Landscape Architecture
- Capital Planning and Development
- Environment, Health and Safety
- Physical Plant
- Space Management Office
- Transportation Services

In launching the 2012 EID initiative, it quickly became clear that creating change across such a large organization would require the work of many individuals with representation from all parts of the division. To tackle this challenge, a cross-functional, division-wide EID team was formed comprised of staff from each functional department. In partnership with the Associate Vice Chancellor and the FP&M Leadership Team, this group was tasked with developing the 2013 FP&M EID Plan. The result was an ambitious and far-reaching document that articulated the path to a more diverse and inclusive division through the achievement of more than 40 Key Actions to be accomplished over an indefinite time period.

Early in the planning process, the FP&M EID team focused its attention on developing a new mission, vision, and set of core values for FP&M, an important effort that not only gave the team an early, tangible product and sense of accomplishment, but also provided a succinct, core message that could be shared throughout the division. At the same time, the FP&M Leadership and FP&M EID teams began to build out an organizational EID structure in order to better manage the daunting challenge of spreading the EID initiative to all levels of employees. Departmental EID teams were formed and tasked with developing their own EID plans.
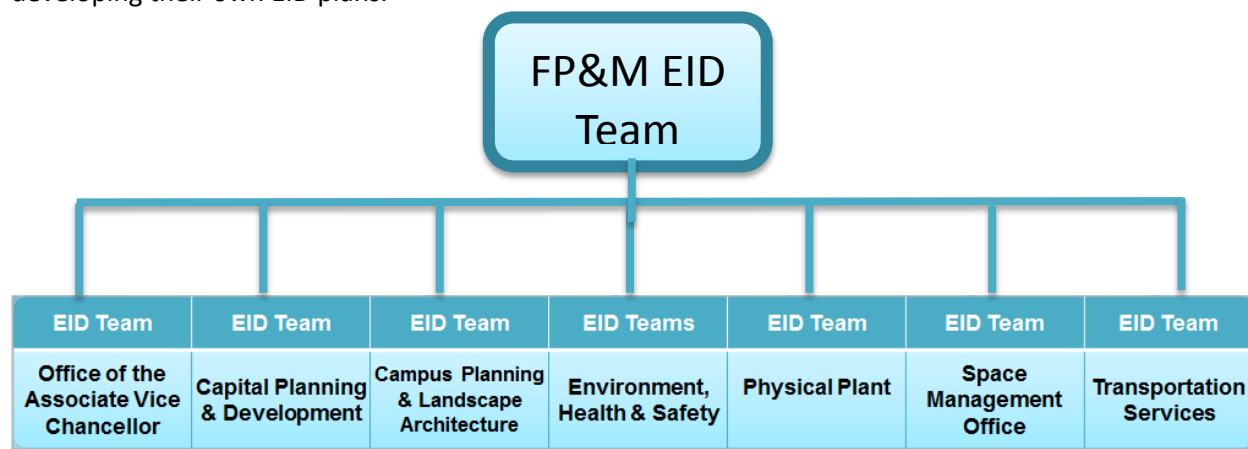
This structure fostered employee involvement by expanding the number of FP&M staff directly tied to the EID initiative. For some departments, particularly smaller ones, the addition of departmental teams was relatively easy. For larger teams, especially the Physical Plant department, the evolution took more time due to the larger number of functional units and employees. As of fall 2014, there are now twelve separate FP&M departmental EID teams with more than 50 employees directly involved in leading the EID effort, including six teams within the Physical Plant. And there is still more effort underway to make sure that we are engaging all employee groups, particularly the second and third-shift operations and English language learner (ELL) employees.

Since the first VCFA EID Survey in 2012, a good amount of progress has been made toward making FP&M a more inclusive, engaged, and diverse organization. Many of these accomplishments are outlined in Section 3 of this plan. Still, despite the good work completed to date, there is still a long way to go. The 2014 VCFA EID Survey data shows modest gains in a number of areas, but in others, the scores remain flat or have even gone down. Some of this may be attributable to the fact that the overall response rate to the survey more than doubled from 40% in 2012 to 85% in 2014 (There were 949 total respondents in 2014 compared to 482 in 2012). In addition, while scores may not have gone up in all areas, the higher survey response rate itself is considered to be a demonstration of increased employee engagement.

In reflecting on this journey in preparation of the FY15 EID Plan update, several themes have emerged. First, while there is still much to do to achieve the long-term vision, a substantial amount of progress has been made. Second, while having each departmental team develop its own plan (all of which have been posted at http://www.eid.FP&M.wisc.edu/teams.htm), this approach has resulted in some duplication of effort. Finally, by including so many goals in the 2013 plan, there was a tendency for some team members to feel overwhelmed or discouraged by the task at hand or to develop the sense that change wasn't happening fast enough.

Thus, the FY15 EID Plan offers a new approach that has been informed by these lessons learned from the past. The FY15 EID Plan starts by acknowledging all the many accomplishments over the past 18 months. Next, it establishes seven core EID priorities to focus on in the coming year: employee onboarding, performance evaluations, supervisor/manager training and coaching, employee talent development, recognition, communication, and increasing staff diversity, especially at the supervisory/managerial level. Finally, the 2014-15 approach places emphasis on greater coordination between the divisional plan and department-specific plans by encouraging departments to build their plans using the seven core priorities outlined here.

Section 2: FP&M FY15 EID Plan – Seven Priorities at a Glance

1. Diversity Recruitment and Retention

FP&M recognizes that diversity and inclusion initiatives help to create an environment where individuals from different backgrounds, orientations, and points of view are treated fairly and given equal access to opportunities and resources. By increasing representation at all levels, FP&M will be able to leverage a broader range of mindsets and backgrounds for more creative problem-solving and decision-making. Other benefits include increased employee and customer satisfaction, higher productivity, and higher retention.

2. Employee Onboarding

A coordinated, integrated FP&M onboarding process for new hires will increase inclusion and employee engagement from the onset of employment and shorten the time from hire to full productivity.

3. Performance Reviews

In FY14, all FP&M employees received an annual performance review, but due to the use of multiple formats and different levels of training, not all evaluations accurately describe work performance, set goals for improvement, or include professional development. With HR Design, UW-Madison will be moving to a performance-based merit system making high quality, consistent performance reviews essential. In addition, in FY15 all FP&M supervisors will be required to have a solid understanding of the core EID competencies, which will also be tracked through the annual evaluation process.

4. Manager and Supervisor Trainings

The 2014 VCFA EID Survey results suggest a need for FP&M managers and supervisors to continue to develop their competencies. FP&M has already made a substantial commitment to this initiative by requiring all managers to participate in the VCFA EID trainings and by offering the four-day APPA Supervisor's Toolkit Workshop. The FY15 EID Plan continues these efforts by focusing on strategies to build credibility, trust, and growth within the division.

5. Develop Internal Talent

Employee development builds loyalty in an organization. An inclusive, engaged workforce is required for an environment where employees develop. An exclusive, disengaged workforce where employees do not develop can cost an organization by the loss of talented individuals with aptitude who have a need to progress and learn. FP&M seeks to foster an environment where employees have commitment (a willingness to persevere through a task) and confidence (a belief in one's ability to accomplish tasks) that is supported by the organization, unit and management, regardless of race, gender, age, sexual orientation, political affiliation, or labor organization membership.

6. Recognition

The 2014 VCFA EID Survey reiterates that recognition, including tools and opportunities, is important to FP&M staff and needs to be improved division-wide.

7. Communication

Communication continues to be a key component for how FP&M informs, includes, and engages its employees. The FY15 EID Plan continues to address the diverse needs of staff over multiple shifts as well as those multilingual staff, by using multiple distribution channels to communicate with employees.

Section 3: Accomplishments Since July 2013 EID Plan

This section highlights EID accomplishments that have taken place since the original FP&M EID plan was developed in 2013, organized into four sections: General Accomplishments, Increasing Representation and Recruitment, Increasing Engagement, and Increasing Inclusion.

General Accomplishments
- The FP&M EID Team prepared talking points to help managers present a consistent message about the EID initiative across FP&M. A number of avenues were used to educate and help employees and supervisors learn about EID and ways to improve their work environment.
- FP&M's Leadership Team has been actively involved in the EID initiative, helping to prioritize Key Actions to engage staff across the organization, and identifying resources to advance the initiative.
- The VCFA EID Survey participation was increased from 40% in 2012 to 85% in 2014.
- Individualized department EID Plans were created and discussed with staff in the smaller departments. Work in the Physical Plant is ongoing with the six EID teams created in the department.
- The first annual FP&M EID Summit was held so that members of each EID team could share their progress and plans for implementation.
- FP&M's Leadership Team focused on building credibility and trust throughout the organization with the following:
    - A Policy Advisory Review Group (PARG) was formed with representation from each of the six major departments to ensure consistency across the organization in formatting and distribution of policies and procedures.
    - The Associate Vice Chancellor held annual staff meetings throughout FP&M to keep staff informed and obtain feedback.   Eight meetings were held to allow all staff to attend.
    - The Physical Plant Executive Director held meetings with each work group to discuss the results of the 2012 VCFA EID Survey and their work environment. Employees were encouraged to provide feedback both at the meetings and through comment cards. Separate meetings were held with the supervisors. A total of 55 employee meetings were held and documented. Meeting notes were then shared with the individual work groups.
    - New mission, vision, and core values for FP&M were created, shared with staff and incorporated into the daily work of the organization.
    - Business cards with the mission, vision, and core values were printed in multiple languages (English, Spanish, Hmong and Tibetan) and distributed at annual department meetings.
    - Suggestion boxes were installed in five locations across campus for employees to anonymously share their concerns and suggestions with management.
    - The Physical Plant Executive Director held several listening sessions with staff to address concerns and misconceptions that had been identified through suggestion box comments. Several hundred staff members attended each session.

Increasing Representation and Recruitment
- All FP&M supervisors are attending EID training sessions offered through the VCFA.

- All Search & Screen Committees for FP&M vacancies must contain diverse recruitment panels and receive training on how to manage a good recruitment process.
- The Search & Screen Committee for the Human Resources Director position has diverse representation from all areas of FP&M to provide varied participation in the process.
- An AVC Onboarding Committee was formed to begin working on a formal onboarding procedure to standardize the process and ensure that new employees are properly welcomed and given all the necessary information. This initiative is ongoing and will be included in the 2014 plan.
- The FP&M Employee Handbook is being updated to provide employees with accurate information.
- FP&M piloted the WiGrow program with three different groups of students to provide learning opportunities and develop skills in transitioning to permanent employment.
- Student talent is being fostered in a number of areas across FP&M including working with the Urban League as well as the sustainability initiative on campus through the WE Conserve program.
- FP&M is exploring working with the Recruitment Initiative for Student Employees (RISE) to attract student employees.
- Transportation Services has employed students in an informal internship capacity to draft policies and procedures for their program areas.
- Announcements of current vacancies in FP&M are now posted and shared with employees on a weekly basis.
- A policy on tuition reimbursement is being developed to provide opportunities for employees to enroll in courses on campus.

Increasing Engagement
- A communication plan was prepared prior to the release of the 2014 VCFA EID Survey to inform all employees of the purpose of the survey and the importance of participating to "have their voices heard" concerning their work environment.
- 2014 VCFA EID Survey-taking events were held throughout campus during all work shifts, with interpreters available to help with translations. These events built unity and comradery with staff from other work units, and stressed that their opinions were valued.
- Participation in the 2014 VCFA EID Survey more than doubled from the 2012 survey. The participation rate increased from 40% to 85%.
- Core competencies and expectations have been established and shared with supervisors. All Physical Plant supervisors are attending a mandatory four-day APPA Toolkit training to help supervisors engage and connect with their employees, reinforce listening skills and provide timely and ongoing feedback. Two training sessions were held in 2014 and the remaining supervisors are scheduled for the training in early 2015.
- FP&M helped build community spirit throughout the largest work unit (the custodial staff) by hosting an ice cream social for all 2nd and 3rd shift workers across the campus. The work done by these employees is vital to the campus and this annual event will help them feel appreciated and part of the campus community.
- A newsletter was developed and launched with distribution throughout FP&M in several formats to accommodate all employees and keep them informed.
- A standardized format for the FP&M web presence was developed and work continues in updating and enhancing all department web sites to provide information to our customers, the campus community and our staff.

- Bulletin boards in the major work locations of the Physical Plant have been updated to include areas to share customer feedback, kudos to staff, EID actions, interesting facts about a highlighted work group and the mission, vision, and core values of FP&M.
- Additional computers have been added in a number of areas of the Physical Plant to provide access for employees that do not work in an office setting.
- In response to employee requests, this year's Annual OHR Benefit Fair was also held during the night shift allowing 2nd and 3rd shift workers to receive the same opportunity to talk with vendors as their daytime colleagues. Over 240 employees attended the event.
- In an effort to increase trust with management, and FP&M Human Resources in particular, a number of new projects have been implemented including the Policy Advisory Review Group, and a vacancy log was created to help the directors manage their vacant positions. Efforts are ongoing to provide more transparency and understanding of the various human resources functions.
- A "facelift" was given to Room 19 in the 45 N. Charter Street building to provide a welcoming and inviting location for custodial interviews and share the campus spirit with potential employees.

Increasing Inclusion
- All FP&M supervisors are attending mandatory EID training sessions offered through the VCFA.
- Managers and supervisors have been encouraged to promote transparency throughout FP&M by sharing and passing on information in a timely manner and keeping staff informed of pertinent topics.
- FP&M values are being translated into appropriate behavior for supervisors by mandating the APPA Toolkit training for all Physical Plant supervisors.
- Coaching on what is appropriate work place behavior has been given to all staff and supervisors in the Physical Plant during work unit listening sessions and follow-up meetings.
- Mandatory safety training has been given to all Physical Plant employees with additional specific job-related training to staff as needed.
- A new "It's Safe to Talk About My Safety" program is being implemented to provide a safe way for employees to highlight safety concerns to management so that they may be addressed.
- A large format inclusive organizational chart has been prepared for the Physical Plant and is being used in a number of ways to help the 950 employees see how they relate to the other work units and show that they are an integral part of FP&M and the campus community.
- Suggestion boxes have been installed throughout the FP&M work units for employees to voice their concerns and communicate with management in a non-threatening manner.
- Our major customers across campus, the Facility Managers for all campus buildings, have met to discuss a variety of topics. Contact information has been shared and a distribution list has been developed to improve communication within and among this group.
- Usage and need for FP&M telephones, cell phones, and pagers has been evaluated and information updated. New standards have been set for available cellular phones.
- An E-mail distribution list has been established for all FP&M staff so that information can be shared more easily throughout the division.
- A new telephone portal has been developed and includes standardized information for each telephone issued to FP&M employees. The list will be available to all FP&M staff and will be kept current on the website. This will allow direct communication for our staff and provide an easily accessible format. Printouts of the list both in an alphabetical and department format will be updated every six months and made available to staff.

Section 4: 2014-15 EID Plan – Seven Priorities

This section outlines the seven major components that comprise the FP&M 2014-15 EID Plan. These were identified as priorities by the FP&M EID team based on their review of the results of the 2014 VCFA EID survey. These seven priorities all support FP&M's three major EID themes identified in the original EID plan: Increasing Representation and Recruitment, Increasing Inclusion, and Increasing Engagement. Each section identifies both Key Actions from the 2013 plan that are carrying forward into the current year plan, and also identifies new projects or areas of focus for the 2014-15 year.

1. Diversity Recruitment and Retention

In its 2013 EID Plan, FP&M recognized that diversity and inclusion initiatives help to create an environment where individuals from different backgrounds, orientations, and points of view are treated fairly and given equal access to opportunities and resources. The plan further acknowledged that by increasing representation at all levels, FP&M would be better placed to leverage a broader range of mindsets and backgrounds for more creative problem-solving and decision-making. Other benefits will include increased employee and customer satisfaction, higher productivity, and higher retention. The stated goal identified in the first report remains, which is to show a steady increase, from year to year, in gender diversity and in the number of persons of color throughout the organization.

The 2013 plan identified Key Actions to support these efforts, many of which have been fully or partially implemented including:

- Being mindful of language to ensure position descriptions, job announcements and general communications are inclusive and respectful (e.g. be more specific than 'equal opportunity employer').
- Developing statements that set expectations related to cultural competency/core values for all management positions, and similar statements for all staff. Incorporate statements into all position descriptions.
- Reviewing recruitment instructions/exams/interview questions to ensure clarity and elimination of cultural references that could limit diversity.
- Creating Search and Screen Committees and interview panels that are diverse in gender, heritage, age, perspective, and include customer representation when appropriate.
- Evaluating types of positions and target advertisement to attract a diverse pool of candidates via specific publications, conferences, professional organizations and networks (e.g. Urban League, National Associate of Women Engineers, etc.).
- Requiring training for supervisors, Search and Screen Committees and interview panels regarding:
  - o Bias Literacy (i.e. understanding bias/assumptions inherent in the screening and interviewing candidates); and,
  - o Interviewing – parameters (what is legally required, what flexibility exists), crafting behavioral interview questions, evaluating responses, etc.
- Requiring FP&M directors to report on diversity recruitment plans/efforts/strategies/successes at Leadership Team meetings.

Heritage and Gender Analysis for 2012 and 2014:		2012	2014
Total	Total number of employees in survey population	936	1097
Gender	Total percentage of women in FP&M	23.7%	25.8% (+2.1%)
Ethnicity	Total percentage of persons of color in FP&M	28.4%	27.3% (-1.1%)

2014-15 EID Key Actions to Support Diversity Recruitment and Retention

Key Action: Consider using social media (e.g. Facebook and Twitter), to reach a younger demographic.

Key Action: Partner with the Office of Human Resources, the Urban League and other local agencies to develop apprenticeship programs within Environment, Health and Safety and the Physical Plant. The Physical Plant program, in particular, will provide opportunities for existing employees to increase their skills by learning a skilled trade or supervisory skills, which will in turn lead to increased diversity at the manager/supervisor level.

Key Action: Develop a written set of recruitment guidelines for FP&M hiring managers outlining expected best hiring practices related to diversity recruiting and track individual recruitments to ensure guidelines are being consistently followed.

It should be noted that retention and recruitment are two sides of the same coin – increasing representation or diversity. Recruitment can increase diversity, but retention initiatives help to maintain it. Once individuals are recruited, certain initiatives and programs must be in place to help keep them. These include employee onboarding, performance reviews, training, developing internal talent, and recognition, all of which are addresses in the sections below.

2. Employee Onboarding

The 2013 FP&M EID plan identified the need to create an integrated process to increase inclusion and employee engagement from the onset of employment and shorten the time from hire to full productivity. While some departmental activity has occurred, a division-wide initiative was put on hold pending the outcome of the new campus onboarding policy. In the interim, the FP&M New Employee Handbook was updated, which had not been revised in over 10 years. This action laid the groundwork for a formal onboarding program and, now that the campus policy is approved, it is time to act. In any given year, FP&M has approximately 257 original new hires, 30 promotions/transfers and four reinstatements. Given this large number of new employees, a standard, division-wide onboarding program is needed. The program should be customized for different types and levels of positions, but it is essential that all FP&M operations have an onboarding program to ensure work units are prepared to welcome each new employee.

Monitor favorable scores on the following survey questions:		2012	2014
Q3a	"I have the resources to do my job well."	74%	70% (-4%)
Q3b	"I know what is expected of me on the job."	83%	88% (+5%)

Q2a	"I receive support and encouragement from others in my work unit."	72%	71% (-1%)
Q4a	"My work unit is successful at accomplishing its mission."	77%	75% (-2%)
Q4b	"My work unit produces high-quality products and services."	75%	75% (NC)

2014-15 EID Key Actions to Support Employee Onboarding

Key Actions: Create a formal onboarding process across FP&M. Customize for different types/levels of positions to ensure the work unit is prepared to welcome each new employee. Identify roles and responsibilities for the supervisor, co-workers and peers. Specific steps that will be followed to accomplish this include:

- Form a project called FP&M Onboarding Design; Model after HR Design;
- FP&M Onboarding Design will be a division-wide effort to develop a consistent, efficient and welcoming process that best serves the needs of hiring supervisors and new employees;
- 4 work teams to components of Onboarding: (1) Employee Safety, (2) Equipment & Tools (Office/Trades), (3) HR/Benefits, and (4) Transportation;
- As soon as 4 work teams develop each component, assemble 3 project support teams to prepare for implementation: (1) Communication/Marketing, (2) Metrics/Recordkeeping, and (3) Training/Change Management;
- Scope/Boundaries: (1) Hiring process improvement will be outside of this project. (2) Performance management process improvement will be outside of this project;
- Questions to Ask Ourselves (potential metrics): (1) Is everyone on board and on the same page? (2) Are we improving? ; and,
- By July 1, 2015, FP&M will have something (i.e. written documents in binders, a website, or a learning portal) to show OHR what constitutes an implementable program by divisional Onboarding Coordinator(s) and hiring managers.

Key Actions: Ensure FP&M Onboarding Program includes the following components:

- FP&M/departmental 'welcome packets' that contain information about affinity groups, childcare, transportation options, mission, vision, core values, etc.;
- The new employee handbook and standard operating procedures across FP&M and within departments;
- Identification of training needs as part of plan; and,
- Worksite preparation and onboarding checklists for new employee (office, computer, phones, keys, etc.).

Key Actions: Establish and communicate performance expectations by:

- Training supervisors on the process of setting expectations, managing performance; and,
- Providing supervisors with guidance/training on relating job responsibilities to the FP&M mission, vision, and core values.

3. Performance Reviews

The 2013 EID Plan identified the importance of having a robust employee performance appraisal system. The first step toward this goal was to put a process in place to ensure that all 1,100+ FP&M employees were in fact receiving an annual review and that their supervisor had received some basic training on

how to conduct evaluations. This process was successfully initiated and for both FY13 and FY14, all FP&M permanent employees received an annual performance appraisal and the 2014 survey data seems to indicate that this is making a positive difference. Still, there is more work to do to ensure consistency of quality across the division. With HR Design, UW-Madison will be moving to a performance-based merit system making quality, consistent performance reviews essential to making this system work and be fair across the board. Currently, there is no single, standard evaluation format for the division, which contributes to inconsistent quality levels and makes supervisor training challenging. Due to the diversity of positions and duties inside of FP&M, multiple standard review formats may be necessary to ensure each employee receives a thorough and effective performance review that is useful to the employee as well as the supervisor and upper management. Once this is done, an improved supervisor training program for evaluations will be needed. In addition, evaluation forms for supervisors and managers need to be updated to include understanding and knowledge of the core EID competencies

Monitor favorable scores on the following survey questions:		2012	2014
Q3a	"I have the resources to do my job well."	74%	70% (-4%)
Q3b	"I know what is expected of me on the job."	83%	88% (+5%)
Q3c	"My job makes good use of my skills and abilities."	69%	72% (+3%)
Q3d	"I have sufficient opportunity to earn a high performance rating"	56%	61% (+5%)
Q3e	"Recognition is based upon work performance"	40%	45% (+5%)
Q3f	"I am satisfied with the recognition I receive for my work."	48%	50% (+2%)
Q3h	"It is clear to me what I need to learn to be adequately prepared for promotional opportunities."	50%	54% (+4%)
Q5b	"My supervisor provides me with useful feedback on my job performance"	66%	69% (+3%)

2014-15 EID Key Actions to Support Performance Reviews

Key Action: Create a consistent performance evaluation system across FP&M to ensure all employees receive a useful performance evaluation that provides them with adequate and accurate feedback to improve their job performance. Additional suggestions include:
- While the system needs to have standard components, expectations and measures, the actual performance evaluations should be customized with specific goals identified for each individual employee;
- Consider the use of different standard formats to accurately reflect the employee's role in the division;
- Identify methods for career development, including instruction on creating personal improvement plans;
- Enhance performance reviews by including input from co-workers; and,
- Include employee input on supervisor and manager performance reviews.

Key Action: Establish core competencies and expectations for all supervisors in performance management. Include appropriate language in position descriptions and in performance evaluations. Provide the training necessary for supervisors to meet/exceed expectations and require attendance. Core competencies to include:

- The ability to connect with and engage employees;
- Providing timely and ongoing feedback;
- Providing positive feedback as well as constructive criticism;
- Establishing a mentor/mentee relationship between supervisors and employees; and,
- Listening skills.

4. Manager and Supervisor Trainings

As a result of the 2013 FP&M EID Plan managers/supervisors were required to participate in the mandatory EID sessions offered through the VCFA.   Many Physical Plant and some other FP&M department supervisors also participated in the APPA Supervisor Toolkit; a four-day training sponsored by APPA – "Leadership in Educational Facilities", www.appa.org. Many employees attended these trainings after the 2014 VCFA EID survey, though, so it is unclear how far-reaching the impact of these trainings has been to date. In any case, overall satisfaction with supervisors is one area in which FP&M's overall scores went down from 2012 to 2014. Other efforts that have been initiated include development of clear policies and procedures across the division, but there is still much work to be done to complete this project. Consequently, the 2014 FP&M EID Plan will continue to focus on actions that build credibility, trust, and growth within the division.

Monitor favorable scores on the following survey questions:		2012	2014
Q5h	"Overall I am satisfied with the managers/leaders above my supervisor."	52%	42% (-10%)
Q5c	"My supervisor is provided with the tools to be successful within the work unit"	61%	59% (-2%)
Q5j	"Policies are applied fairly in my unit"	63%	56% (-7%)
	Summary – Overall Satisfaction with Supervisors	65%	61% (-4%)

2014-15 EID Key Actions to Support Manager and Supervisor Trainings

Key Action: The Leadership Team will continue to focus on building credibility and trust throughout FP&M:
- Model the values that are important to FP&M;
- Solicit and respond to feedback from staff (e.g. 360 performance review); and,
- Model customer service skills through interactions with employees (i.e. internal staff should be viewed as customers of management).

Key Action: Provide training/resources for employees to increase trust with management. Examples include:
- Training on the purpose of performance evaluations and how they are conducted;
- Learning to receive feedback, how to solicit feedback;
- Training to communicate how to access resources available to help employees resolve problems (e.g. FP&M Human Resources, Employee Assistance Office, the Ombuds Office, etc.). The intent is to eliminate the fear of asking for help; and,

- Training on how to learn about, and apply for, promotion and advancement opportunities.

Key Actions: Continue with APPA Supervisor Toolkit and VCFA Engagement, Inclusion & Diversity Training for all FP&M managers & supervisors:
- Once trainings are completed, integrate EID competencies into the 2014-2015 performance evaluations for all supervisors & managers (from 2014 FP&M Annual Plan);
- Expand APPA Supervisor Toolkit Training to include all FP&M supervisors & managers;
  - APPA - the gathering place for those of us engaged in the field of educational facilities management, and dedicated to the ongoing evolution of its professionals into influential leaders in education.
  - 70 PP supervisors have taken the APPA Supervisor Toolkit Course.
  - 25 Physical Plant supervisors remain.
  - Available to all FP&M supervisors and managers.
- Training should include perceived misperceptions of others to eliminate bullying, fear, deception, mistrust from managers & supervisors – this should be consistent throughout FP&M;
- Accountability will be measured on performance reviews – i.e. did they take the trainings; and,
- Pursue mentoring and coaching programs/trainings.

5. Develop Internal Talent

Employee development builds loyalty in an organization. An inclusive, engaged workforce is required for an environment where employees develop. An exclusive disengaged workforce where employees do not develop can cost an organization by the loss of talented individuals with aptitude who have a need to progress and learn. Employees that have commitment (a willingness to persevere through a task), and confidence (a belief in one's ability to accomplish tasks), should be supported by the organization, unit and management to develop, regardless of race, gender, age, sexual orientation, political affiliation or labor organization membership.

The 2013 EID Plan identified the importance of developing employee talent and outlined a series of actions to advance this priority, including promoting professional development opportunities, announcing job/promotional opportunities internally, and creating a model for advancement/career development. Since then, progress has been made on several fronts. Current vacancy announcements are now distributed to all FP&M employees, a new tuition reimbursement policy has been drafted, and professional development plans have been incorporated into performance evaluations for many staff. The 2014 survey results would suggest that these actions are yielding positive results, but there is still a lot of room for improvement so this initiative carries forward as a priority for FY15.

Monitor favorable scores on the following survey questions:		2012	2014
Q5h	"I am given real opportunity to improve my skill in my work unit."	50%	54% (+4%)
Q3i	"It is clear to me what I need to learn to be adequately prepared for promotional opportunities"	34%	39% (+5%)

2014-15 EID Key Actions to Support Development of Internal Talent

Key Action: Host a FP&M Job Fair for FP&M employees. Provide opportunities for employees to learn about other jobs (skills, education, training, certifications required, etc.) from their FP&M co-workers. Provide information on how to advance within a specific job type or through other paths.

Key Action: Provide training opportunities for FP&M employees such as:
- How to advance in FP&M, and at the University;
- How to prepare an application for State service (cover letters, tests);
- How to prepare a resume;
- How to interview; and,
- Basic skills – computer, life skills, etc.

Key Action: Set an expectation that supervisors will provide employees with opportunities to build skills that will allow them to promote within FP&M or compete for positions external to the organization.
- Encourage committee involvement both within FP&M and on campus;
- Support involvement in professional organizations; and,
- Provide monetary support and work schedule flexibility as needed.

Key Action: Create a model for advancement/career development. The model should:
- Create opportunities for advancement;
- Identify clear paths of progression for different positions;
- Identify cross-training opportunities to support career growth; and,
- Provide guidance for supervisors on coaching employees to prepare for advancement (including acceptance of employees promoting out of FP&M).

Key Action: Provide feedback/mentoring to internal candidates who are not selected so they understand what to improve or consider doing differently in the future.

Key Action: Promote FP&M's tuition reimbursement policy to ensure employees are aware of opportunities to enroll in career-related courses at UW-Madison and elsewhere through cost-sharing and tuition reimbursement.

Key Action: Provide opportunities to all employees to stay current in their respective fields regardless of whether they are interested in promotions or advancement:
- Training opportunities should be equitably offered regardless of the 'group' that someone belongs to;
- Training funds should be used on those employees that exhibit a team spirit. Employees that receive the opportunity for select training should be considered not only based on aptitude and interest, but on their history of sharing knowledge with other employees;
- Support and encourage the continuing education needed to keep required certification(s) current; and,
- Mandate appropriate safety skills and knowledge for all FP&M positions.

6. Recognition

The 2014 VCFA EID Survey reiterates that recognition is important to FP&M staff and needs to be improved division-wide. While scores have improved somewhat over 2012, the goal is to continue to increase the favorable response rating to at least 75% over time.

Monitor favorable scores on the following survey questions:	2012	2014
Q3e	"Recognition is based on performance in my work unit." (favorable rating)	40%	45% (+5%)
Q3f	"I am satisfied with the recognition I receive for my work" (favorable rating)	48%	50% (+2%)

2014-15 EID Key Actions to Support Employee Recognition

Key Action: Develop supervisory/manager competencies regarding performance appraisals and employee recognition:
- Require all supervisors attend the trainings for the new performance management system;
- Establish core competencies and expectations for all supervisors in performance management;
- Include appropriate language in position descriptions and in performance evaluations; and,
- Provide training necessary for supervisors to meet/exceed expectations including training on employee engagement and recognition.

Key Action: Establish a comprehensive program to acknowledge contributions and recognize employees:
- Compile all current recognition programs across FP&M. Review recognition programs within other divisions and look for best practices;
- Employees should be recognized for both individual and group accomplishments;
- Should include a process for nominating FP&M staff for university-wide awards;
- The program should be reviewed regularly, at least once or twice a year, to ensure recognitions continue to fit the culture and remain relevant and important to employees;
- Establish necessary funding stream for recognition programs;
- Publicly share commendations and "thank you's" from campus, customers, and outside organizations;
  - Have a section on the FP&M website, include in the newsletter, and on bulletin boards.
- Continue the Length of Service Awards;
  - Review for improvements and consistency.
- Build unity and community through special events and celebrations:
  - Continue the employee appreciation ice cream social for day and night shifts; and,
  - Create other additional appropriate events as needed.

7. Communication

The 2013 EID Plan identified developing a communications plan to include consistent messages about the purpose of the EID initiative and the function of the EID Team. A detailed communication plan was created which outlined the need to share broader types of messages including, division-wide updates, policies and procedures, and employment opportunities. The plan identified multiple ways to share this information with employees. Even though several accomplishments have been achieved from the 2013 EID plan, the focus for 2014-2015 will continue to address the diverse needs of staff over multiple shifts as well as those multilingual staff, by using multiple distribution channels to communicate with employees. An updated FP&M website which includes an employee portal for division news and announcements, and a quarterly newsletter distributed by E-mail and hard copy, which also includes translated versions are just a few examples of the ongoing communication efforts across the division.

Monitor favorable scores on the following survey questions :		2012	2014
Q1m	"If I have a conflict with another employee, I know where to go to effectively resolve the issue."	65%	70% (+5%)
Q3a	"I have the resources to do my job well"	74%	70% (-4%)
Q5b	"My supervisor provides me with useful feedback on my job performance"	66%	69% (+3%)
Q5c	"My supervisor is provided with the tools to be successful within the work unit"	61%	59% (-2%)

2014-15 EID Key Actions to Support Communication

Key action: Provide a mechanism to inform FP&M staff of current vacancies via the updated FP&M website as well as continued E-mail and improved paper distribution of these messages.

Key action: Provide equal opportunities and access to information by:
- Providing computer access for employees who do not work in offices (e.g. providing computer kiosks and computer literacy training); and,
- Allow all employees to attend the Benefits Fair, including 2nd and 3rd shift workers.

Key action: Ensure employees have the tools and equipment in proper working order, and the adequate supplies needed to be successful in their jobs.

Key action: Require transparency in communication. Managers and supervisors should be encouraged to pass on information to the best of their ability, with the information available at the time.

Key action: Develop effective strategies for sharing information across the FP&M division using multiple distribution channels to include:
- Websites for FP&M departments and EID team;
- Newsletters (electronic and hard copy);
- Effective and inclusive division-wide E-mail distribution;
- Post hard copy fliers at multiple locations to ensure those without regular computer access receive messages;
- Ensure translation of content is available whenever possible; and,
- Create standards for staff meeting formats to include standard consistent messages throughout the division.

Appendix 1

2014 Core FP&M EID Leadership

2014 FP&M EID Team Members

Anne Bogan	Transportation Services - Administration
Liz Hammen	Office of the Associate Vice Chancellor - Communications
John Hanson	Physical Plant – Electric Shop
Margaret Maly	Physical Plant - Administration
Shoko Miyagi	Office of the Associate Vice Chancellor -Training
Rebecca Moritz	Environment, Health and Safety - Biosafety
Dan Okoli (Chair)	Capital Planning and Development
Laura Peterson	Transportation Services
Rob Shively	Space Management Office
Top Tantivivat	Campus Planning and Landscape Architecture
Ex Officio:	
Bill Elvey	Associate Vice Chancellor for Facilities Planning & Management
Margaret Tennessen	Deputy Associate Vice Chancellor

FP&M Leadership Team

Bill Elvey	Associate Vice Chancellor for Facilities Planning & Management
Margaret Tennessen	Deputy Associate Vice Chancellor
Gary Brown	Director, Campus Planning and Landscape Architecture
Ken Dvorak	Financial Management Supervisor
Nancy Gardner	Executive Assistant
Liz Hammen	Communications Specialist
Patrick Kass	Director, Transportation Services
Rob Lamppa	Executive Director, Physical Plant
Dan Okoli	University Architect/Director, Capital Planning and Development
Doug Rose	Director, Space Management Office
Paul Umbeck	Director, Environment, Health and Safety

Appendix 2

Original Charter - FP&M Engagement, Inclusion & Diversity (EID) Team
January 16, 2013

Team Focus:	Develop strategies to increase employee engagement and inclusion, and leverage diversity across Facilities Planning and Management.
Executive Sponsors:	Associate Vice Chancellor Bill Elvey and the FP&M Leadership Team
Team Leader:	Dan Okoli
Definitions: **(VCFA Implementation & Resource Guide)**	**Engagement** is the feeling of 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. **Inclusion** refers to a sense of belonging; feeling respected, valued, and seen for who you are and valued as a contributing member of the team, work group, or organization. **Diversity** is the 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, and values and beliefs.
Team Goals, Scope, Deliverables:	Develop and recommend strategies in order to: • Ensure employees understand the role of FP&M and the importance of their individual jobs in supporting the mission of FP&M and UW-Madison. • Improve connections and communication to create more informed decision-making across the organization and ensure resources are utilized effectively. • Strengthen relationships between management and staff to create a positive work climate. • Create an environment of respect and inclusiveness. Create and retain an inclusive and diverse 21st century workforce that fully recognizes and utilizes the talents, skills, and contributions of all employees.
Decision Authority:	Team will make recommendations to the FP&M Leadership Team who will be responsible for identifying the steps required for action planning and implementation.
Key Tasks/Actions and Timelines:	1. Update the FP&M mission, vision and value statements to reflect the importance of engagement, inclusion and diversity. Identify strategies to communicate and gain understanding of the mission, vision and values across the organization. (February 2013) 2. Review and analyze FP&M-wide baseline data (including the demographic breakdown) collected in the VCFA Engagement, Inclusion and Diversity (EID) survey and the 2012 Heritage and Gender Analysis. Identify what is working well and opportunities for improvement. (February 2013) 3. Identify key strategies for inclusion in the preliminary FP&M Engagement, Inclusion and Diversity Report due to the Vice Chancellor for Finance and Administration on March 1, 2013. (See template provided in the EID Implementation Resource Guide. The key strategies will be completed by February 15). This team will continue to play a crucial role in the further development of action plans required for implementation. 4. Develop a strategy for communicating team goals, activities, and progress to the organization on a regular basis (March 2013).

Communication Plan:	To be developed
Team members:	Anne Bogan Transportation Services - Administration Steve Grever Physical Plant – Carpenter Shop Becky Guelig Physical Plant – Custodial Services John Hanson Physical Plant – Electric Shop Shoko Miyagi Business & Staff Services - Training Rebecca Moritz Environment, Health and Safety - Biosafety Dan Okoli Capital Planning and Development Laura Peterson Physical Plant – Grounds Rob Shively Space Management Office Top Tantivivat Campus Planning and Landscape Architecture Ex Officio: Bill Elvey Associate Vice Chancellor Dorothy Steele FP&M Deputy/Director of BASS Barb Bronte FP&M Human Resources Facilitation support will be provided by Dorothy Steele
Sponsor's Signature and Date:	William Elvey Gary Brown Patrick Kass Dan Okoli Doug Rose Dorothy Steele Paul Umbeck

Appendix 3

FP&M EID Plan Development Timeline

March 1, 2013   Draft FP&M EID Plan developed and submitted to VCFA

April 23, 2013   Comments received from VCFA

July 1, 2013   FP&M EID Draft Communication Plan developed

                       Intended to increase communication with employees throughout FP&M, the
                       plan serves as a guide for the Communication Specialist who is working on
                       upgrading the FP&M website and other communication vehicles.

July 8, 2013   FP&M EID Work Plan developed

                       This was an action plan that began to assign responsibilities for the Key Actions
                       identified in the July 1, 2013 plan. This work plan has been reviewed and
                       updated periodically by the FP&M EID Team and the Leadership Team.

July 11, 2013   FP&M EID Team FY 14 Action Plan developed

                       This was an action plan developed by the EID team to focus on three high
                       priority goals/objectives in 2014: Increasing Representation and Recruitment,
                       Develop Internal Talent, and Increasing Engagement.

November 2014   FP&M EID Team FY15 Action Plan developed - Updated by FP&M EID team

                       This plan includes updates and accomplishments since the original plan was
                       submitted in July 2013 as well at the FY15 EID priority themes.

Appendix 4

2013 FP&M Engagement, Inclusion & Diversity (EID) Plan (with updated notes)

This plan is offered as a draft EID Plan for FP&M. The EID team held a total of four meetings to brainstorm key actions and measures to include in the plan for each of the focus areas: Increasing Representation and Diversity through Recruitment; Engagement; and Inclusion.   There are a number of steps that are necessary to move this plan beyond this initial draft:

Key actions:

- Develop a communication plan, including consistent messages about the purpose of this initiative and the function of the EID Team. Identify clear channels for employees to learn about, and contribute to, the division's engagement, inclusion and diversity efforts.
- Internal communications plan was created in a separate document outlining items which need to be communicated over multiple distribution channels including an update website and newsletter.

- Develop a work plan for the EID Team to include:
    - Prioritization of key actions – with the Leadership Team;
    - Methods to collect best practices from within FP&M, from other campus departments or external sources that can be used to inform key actions;
    - Identify additional data needs;
    - Processes to engage staff across the organization in order to provide general information about the EID plan, deepen understanding of specific issues, and identify resources to advance key actions; and,
    - Implementation plans for prioritized action steps.

- Develop department-specific EID Plans to respond to EID survey data. FP&M directors will engage staff in their respective departments to create these individualized plans by July 2013.- *Completed*

In beginning the task of developing this EID plan, the team identified an overarching need for the leadership of FP&M to build trust with staff throughout the organization. The VCFA Implementation Resource Guide highlights the critical role leadership plays in creating an inclusive environment that supports engagement and leverages diversity (p.30). FP&M staff gave only a 52% favorable rating to Q5h: "overall I am satisfied with the managers/leaders above my supervisor."

Key actions:

The Leadership Team should focus on building credibility and trust throughout FP&M:
- Develop clear policies and procedures across the organization;
- Communicate clearly and frequently, especially in times of change;
- Learn to listen;
- Commit to frequent, positive interaction with front-line employees;
- Model the values that are important to FP&M;

- Solicit and respond to feedback from staff (e.g. 360 performance review); and,
- Model customer service skills through interactions with employees (i.e. internal staff should be viewed as customers of management).

Increasing Representation and Recruitment

This part of the report is divided into four sections of actions which corresponds to the framework suggested by Adin Palau (p. 35 *Implementation Resource Guide*): General, External Recruitment, Foster Student Talent, and Develop Internal Talent.

Goal: Show a steady increase in the gender diversity and in the number of persons of color throughout the organization.

Current State: The data from 2012 Heritage and Gender Analysis shows that of the 936 employees, 23.7% were female; 28.4% were persons of color. While different departments or work units have taken specific actions to increase diversity through recruitment, there has not been a consistent and coordinated approach across the organization. Models exist within FP&M and UW-Madison that can be employed to support this goal.

Desired State: Facilities Planning and Management will increase diversity overall and across all categories and types of jobs. ---On going in the recruitment process.

General Actions (applicable across external, internal and student recruitments)

Key action: Develop statements that set expectations related to cultural competency/core values for all management positions, and similar statements for all staff. Incorporate statements into all position descriptions.--Continue to develop in conjunction with HR Design project.

Key action: Be mindful of language to ensure positions descriptions, job announcements and general communications are inclusive and respectful (e.g. be more specific than 'equal opportunity employer'). --Work with HR design for consistency.

Key action: Review recruitment instructions/exams/interview questions to ensure clarity and elimination of cultural references that could limit diversity.—Defer to HR Design project to maintain consistent verbiage.

Key action: Evaluate types of positions and target advertisement to attract a diverse pool of candidates via specific publications, conferences, professional organizations and networks (e.g. Urban League, National Associate of Women Engineers, etc.). Consider using social media (e.g. Facebook and Twitter), to reach a younger demographic.

Key action: Create Search and Screen Committees and Interview Panels that are diverse in gender, heritage, age, perspective, and include customer perspective when appropriate.
This is currently being done, the leadership Team is working with HR department on the initiative.

Key action: Require FP&M directors to report on recruitment plans/strategies/successes at Leadership Team meetings.

Expand External Recruitment Strategies

<u>Key action</u>: Develop ongoing relationships, networks and partnerships with other UW-Madison departments/groups and with local organizations that can serve as pipelines for FP&M positions.

<u>Key action</u>: Participate in UW-Madison Job Fairs. Create 'marketing' packets to inform applicants of mission, vision, core values and functions of FP&M.

<u>Key action</u>: Require training for supervisors, Search and Screen Committees and Interview Panels regarding:

- Bias Literacy (i.e. understanding bias/assumptions inherent in the screening and interviewing candidates); and,
- Interviewing – parameters (what is legally required, what flexibility exists), crafting behavioral interview questions, evaluating responses, etc.
    - Several supervisors have participated in WEISLI workshops.

<u>Key action</u>: Create a formal onboarding process across FP&M. Customize for different types/levels of positions to ensure the work unit is prepared to welcome each new employee. Identify roles and responsibilities for the supervisor, co-workers, and peers. Additional strategies include:

- Create FP&M and departmental 'welcome packets' including information about childcare, transportation options, mission, vision, core values, etc.;
- Create standardized employee handbooks and standard operating procedures across FP&M and within departments;
- Create a mentor/buddy system to support new employees. Include a buddy outside of work unit (for perspective and to encourage collaboration across unit lines);
- Identify training needs as part of plan; and,
- Prepare worksite for new employee (office, computer, phones, keys). Onboarding checklists used in other UW departments (OHR) may be a useful tool.

<u>Key action</u>: Establish and communicate performance expectations by:

- Training supervisors on the process of setting expectations, managing performance;
- Providing supervisors with guidance/training on relating job responsibilities to the FP&M mission, vision and core values.

Foster Student Talent

<u>Key action</u>: Participate in Job Fairs.

<u>Key action</u>: Partner with other educational institutions to advertise FP&M and attract students or recent graduates interested in exploring careers in facilities management (e.g. Madison College, Historically Black Colleges and Universities (HBCU), high schools, etc.).

Key action: Actively work with the Recruitment Initiative for Student Employees (RISE) to attract student employees.

Key action: Formalize the student internship program, connect with UW departments and expand across FP&M by:

- Extending internship opportunities to other UW-Madison departments to attract candidates outside FP&M's area of technical expertise (e.g. consider attracting students in the social sciences interested in management).

Key action: Provide learning opportunities for student employees to develop skills in transitioning to permanent employment (within UW or to external employers) by:

- Resume writing (including identifying skills learned at FP&M transferable to other employers); and,
- Interviewing (piloted in January 2013 – Proactive Communication workshops for students).

Key action: The Student Leadership Initiative being advanced through the Office of the VCFA will provide additional guidance on supporting student employees.

Develop Internal Talent

Key action: Host a FP&M Job Fair for FP&M employees. Provide opportunities for employees to learn about other jobs (skills, education, training, certifications required, etc.) from their FP&M co-workers. Provide information on how to advance within a specific job type or through other paths.

Key action: Provide training opportunities for FP&M employees such as:

- How to advance in FP&M, and at the University;
- How to prepare an application for state service (cover letters, tests);
- How to prepare a resume;
- How to interview; and,
- Basic skills – computer, life skills.

Key action: Set an expectation that supervisors will provide employees with opportunities to build skills that will allow them to promote within FP&M or compete for positions external to the organization.

Key action: Create a model for advancement/career development. The model should:

- Create opportunities for advancement;
- Identify clear paths of progression for different positions;
- Identify cross-training opportunities to support career growth; and,
- Provide guidance for supervisors on coaching employees to prepare for advancement (including acceptance of employees promoting out of FP&M).

Key action: Make the recruitment process transparent for supervisors and employees by:

- Creating uniform checklists to ensure consistency across the organization; and,
- Posting checklists to inform applicants/candidates of the process steps.

Key action: Provide a mechanism to inform FP&M staff of current vacancies (e.g. website and paper announcements, etc.).—Updated FP&M website contains a dedicate link to weekly vacancy updates

Key action: Provide feedback/mentoring to internal candidates who are not selected so they understand what to improve or consider doing differently in the future.

Key action: Provide opportunities for employees to enroll in courses at UW-Madison through cost-sharing and tuition reimbursement.

Increasing Engagement

In reviewing the driver analysis for FP&M as a whole, the questions of high importance that received the lowest ratings were:
- Q3d: I have sufficient opportunities (such as challenging work assignments or projects) to earn a high performance rating
  - Importance 14% Favorable rating 56%   2014 Favorable rating 61%
- Q3e: Recognition is based on performance in my work unit
  - Importance 10%   Favorable rating 40%   2014 Favorable rating 45%
- Q5h: Overall satisfaction with managers/leaders above supervisor
  - Importance 10%   Favorable rating 52%   2014 Favorable rating 42%

These same questions, when compared with the demographic data, receive the following rating:

- Q3d: I have sufficient opportunities (such as challenging work assignments or projects) to earn a high performance rating
  - Age less than 35   Favorable rating 52%   2014 Favorable rating 52%
  - Age 35 to 49   Favorable rating 61%   2014 Favorable rating 64%
  - Age 50 to 55   Favorable rating 57%   2014 Favorable rating 61%
  - Age 56+   Favorable rating 52%   2014 Favorable rating N/A
  - Male   Favorable rating 57%   2014 Favorable rating 61%
  - Female   Favorable rating 52%   2014 Favorable rating 60%
  - White   Favorable rating 55%   2014 Favorable rating 58%
  - Asian   Favorable rating 77%   2014 Favorable rating 78%
  - Black   Favorable rating 36%   2014 Favorable rating 58%
  - Hispanic   Favorable rating 73%   2014 Favorable rating 70%
  - Non-specified   Favorable rating 50%   2014 Favorable rating 66%
  - Employment Categories: Student hourly were the lowest favorable rating at 38%, classified permanent next at 55%, and the other categories ranged from 58% (LTE) to 89% (Limited)

- Q3e: Recognition is based on performance in my work unit
  - Age less than 35   Favorable rating 38%   2014 Favorable rating 42%
  - Age 35 to 49   Favorable rating 41%   2014 Favorable rating 43%
  - Age 50 to 55   Favorable rating 38%   2014 Favorable rating 48%

- o   Age 56+   Favorable rating 42%   2014 Favorable rating N/A
- o   Male   Favorable rating 40%   2014 Favorable rating 44%
- o   Female   Favorable rating 41%   2014 Favorable rating 50%
- o   White   Favorable rating 38%   2014 Favorable rating 42%
- o   Asian   Favorable rating 69%   2014 Favorable rating 62%
- o   Black   Favorable rating 21%   2014 Favorable rating 51%
- o   Hispanic   Favorable rating 73%   2014 Favorable rating 51%
- o   Non-specified   Favorable rating 42%   2014 Favorable rating 52%
- o   Employment Categories: Academic staff were the lowest favorable rating at 25%, classified project next at 33%, and the other categories ranged from 38% (student) to 63% (LTE)

Additional analysis of this data is required. The team noted that only 11 Hispanic employees participated in the survey and only 26 Asians participated. The 2012 Heritage Report does not provide a breakdown by race/ethnicity; however, these numbers appear to be low. The team also discussed the importance of culture in responses, noting that Asian employees may be more likely to answer questions favorably, even if they are not satisfied with working conditions. A number of members of the team also expressed concern about the timing of the survey at the same time HR Design was being discussed. Team members felt employees conflated the two initiatives.

Goal: Increase participation in the EID survey, with a specific goal of increasing participation among the various heritage groups.

Goal: Increase the EID survey ratings of engagement on a long-term trend basis.

Key action: Create a communication plan prior to releasing the survey in 2014 to inform all employees of the survey's purpose. Provide information on how to complete the survey well in advance of distribution of the survey. Allow staff to complete the survey during work time.   Administer the survey to work units in groups.—*Completed- The 2014 survey participation increased by 45% as a result of the 2014 survey promotion and planning by the FPM EID teams.*

Key action: Create a consistent performance evaluation system across FP&M. Additional suggestions include:

- While the system needs to have standard components, expectations and measures, the actual performance evaluations should be customized with specific goals identified for each individual employee;
- Identify methods for career development, including instruction on creating personal improvement plans; and,
- Perform 360 degree evaluations.

Key action: Create a program to acknowledge contributions and recognize employees by:

- Soliciting ideas from employees about types of recognition that are well received; and,
- Setting expectation for leaders to routinely model ways to acknowledge/recognize employees.

Key action: Establish core competencies and expectations for all supervisors in performance management. Include appropriate language in position descriptions and in performance evaluations.

Provide the training necessary for supervisors to meet/exceed expectations. Core competencies to include:

- The ability to connect with and engage employees;
- Providing timely and ongoing feedback;
- Providing positive feedback as well as constructive criticism;
- Establishing a mentor/mentee relationship between supervisors and employees; and,
- Listening skills.

Key action: Build unity and community through special events and celebrations (e.g. Mallards' Games, Olin House reception for FP&M employees and families). Create a healthy, fun, competitive environment (e.g. kickball tournament for 2nd shift custodians).
- 2nd 3rd shift Ice cream social August 2014

Key action: Create a communication campaign to keep employees informed. Determine content, process, responsible parties to keep information current. Provide consistent information across the organization such as:

- Tailoring information to communicate how specific jobs/roles support the UW-Madison mission;
- Brownbag gatherings to inform employees of current FP&M and/or UW-Madison initiatives;
- Create an FP&M newsletter to provide unbiased information across the organization (suggested hiring a student intern for production of the newsletter);
- Enhance the FP&M website to inform employees of policies and procedures in an easily accessible manner;
- Use social media (e.g. Facebook and Twitter accounts) to share organizational information with employees; and,
- Place bulletin boards in all employee break rooms for FP&M specific information. This will help ensure consistent communication across the organization.

Key action: Provide equal opportunities and access to information by:

- Providing computer access for employees who do not work in offices (e.g. providing computer kiosks and computer literacy training); and,
- Allow all employees to attend the Benefits Fair, including 2nd and 3rd shift workers.

Key action: Ensure employees have the tools and equipment in proper working order, and adequate supplies to be successful in their jobs.

Key action: Provide training/resources for employees to increase trust with management. Examples include:

- Training on the purpose of performance evaluations and how they are conducted;
- Learning to receive feedback, how to solicit feedback;
- Training to communicate how to access resources available to help employees resolve problems (e.g. FP&M Human Resources, Employee Assistance Office, the Ombuds Office, etc.). The intent is to eliminate the fear of asking for help; and,
- Training on how to learn about, and apply for, promotion and advancement opportunities.

Key action: Create/identify physical space that supports engagement (e.g. break rooms for social interaction, recreational facilities to aid in wellness initiatives, etc.).

- A "facelift" was given to Room 19 in the 45 N. Charter Street building to provide a welcoming and inviting location for custodial interviews and share the campus spirit with potential employees.

Increasing Inclusion

In reviewing the driver analysis for FP&M as a whole, responses to the high importance questions related to inclusion all obtained high ratings.   However, closer examination of the demographic data indicates this does not hold true for all heritage groups.

- Q5e I receive support and encouragement from my supervisor
    - Overall favorable rating of 68%
    - Age less than 35   Favorable rating 74%   2014 Favorable rating 36%
    - Age 35 to 49   Favorable rating 66%   2014 Favorable rating 48%
    - Age 50 to 55   Favorable rating 66%   2014 Favorable rating 40%
    - Age 56+   Favorable rating 67%   2014 Favorable rating N/A
    - Male   Favorable rating 69%   2014 Favorable rating 40%
    - Female   Favorable rating 64%   2014 Favorable rating 48%
    - White   Favorable rating 67%   2014 Favorable rating 38%
    - Asian   Favorable rating 73%   2014 Favorable rating 64%
    - Black   Favorable rating 57%   2014 Favorable rating 49%
    - Hispanic   Favorable rating 73%   2014 Favorable rating 41%
    - Non-specified   Favorable rating 75%   2014 Favorable rating 50%
    - Employment Categories: Limited employees rated this the lowest at 56%. Academic staff had a 58% favorable rating, students were 71% favorable and other categories were in the range of 65% to 88%.

- Q4d: I would recommend my work unit as a good place to work
    - Overall favorable rating of 70%
    - Age less than 35   Favorable rating 72%   2014 Favorable rating 65%
    - Age 35 to 49   Favorable rating 67%   2014 Favorable rating 73%
    - Age 50 to 55   Favorable rating 65%   2014 Favorable rating 67%
    - Age 56+   Favorable rating 74%   2014 Favorable rating N/A
    - Male   Favorable rating 70%   2014 Favorable rating 67%
    - Female   Favorable rating 67%   2014 Favorable rating 72%
    - White   Favorable rating 68%   2014 Favorable rating 64%
    - Asian   Favorable rating 77%   2014 Favorable rating 85%
    - Black   Favorable rating 64%   2014 Favorable rating 74%
    - Hispanic   Favorable rating 82%   2014 Favorable rating 80%
    - Non-specified   Favorable rating 81%   2014 Favorable rating 77%
    - Employment Categories: Classified permanent were the lowest favorable rating at 66%, other categories were in the 75% to 90% range.

Q1e: Work unit is comfortable
- o   Overall favorable rating is 76%
- o   Age less than 35   Favorable rating 78%   2014 Favorable rating 70%
- o   Age 35 to 49   Favorable rating 72%   2014 Favorable rating 79%
- o   Age 50 to 55   Favorable rating 69%   2014 Favorable rating 74%
- o   Age 56+   Favorable rating 82%   2014 Favorable rating N/A
- o   Male   Favorable rating 76%   2014 Favorable rating 74%
- o   Female   Favorable rating 76%   2014 Favorable rating 77%
- o   White   Favorable rating 75%   2014 Favorable rating 75%
- o   Asian   Favorable rating 85%   2014 Favorable rating 85%
- o   Black   Favorable rating 64%   2014 Favorable rating 82%
- o   Hispanic   Favorable rating 64%   2014 Favorable rating 68%
- o   Non-specified   Favorable rating 89%   2014 Favorable rating 76%
- o   Employment Categories: Classified permanent were the lowest favorable rating at 72%, remainder ranged from 81 to 93%

- 2b: Co-workers value and respect each other.
  - o   Overall rating of 63%
  - o   Age less than 35   Favorable rating 72%   2014 Favorable rating 67%
  - o   Age 35 to 49   Favorable rating 63%   2014 Favorable rating 69%
  - o   Age 50 to 55   Favorable rating 59%   2014 Favorable rating 68%
  - o   Age 56+   Favorable rating 63%   2014 Favorable rating N/A
  - o   Male   Favorable rating 62%   2014 Favorable rating 68%
  - o   Female   Favorable rating 66%   2014 Favorable rating 68%
  - o   White   Favorable rating 61%   2014 Favorable rating 66%
  - o   Asian   Favorable rating 77%   2014 Favorable rating 85%
  - o   Black   Favorable rating 64%   2014 Favorable rating 72%
  - o   Hispanic   Favorable rating 73%   2014 Favorable rating 61%
  - o   Non-specified   Favorable rating 78%   2014 Favorable rating 71%
  - o   Employment Categories: Classified permanent favorable rating at 59%, remainder range from 75% to 83% favorable.

- Q6b: Overall satisfied with work unit
  - o   Overall rating of 71%
  - o   Age less than 35   Favorable rating 78%   2014 Favorable rating 60%
  - o   Age 35 to 49   Favorable rating 75%   2014 Favorable rating 73%
  - o   Age 50 to 55   Favorable rating 72%   2014 Favorable rating 68%
  - o   Age 56+   Favorable rating 73%   2014 Favorable rating N/A
  - o   Male   Favorable rating 75%   2014 Favorable rating 66%
  - o   Female   Favorable rating 71%   2014 Favorable rating 72%
  - o   White   Favorable rating 72%   2014 Favorable rating 65%
  - o   Asian   Favorable rating 88%   2014 Favorable rating 80%
  - o   Black   Favorable rating 57%   2014 Favorable rating 74%
  - o   Hispanic   Favorable rating 91%   2014 Favorable rating 75%
  - o   Non-specified   Favorable rating 83%   2014 Favorable rating 75%
  - o   Employment Categories: Classified permanent and LTE positions had a 71% favorable rating. Others ranged from 81% to 95%.

Goal: Create a welcoming and inclusive work environment that allows all staff to contribute fully and be successful at their jobs.

In general, the team noted that many of the actions identified under recruitment and engagement will also improve the sense of inclusion.

Key action: Be mindful of language used both in formal communication and in informal discussion by:

- Encouraging participation in the Plain Language class taught by Cultural Linguistic Services (Custodial Services supervisors participated in this class in 2013).

Key action: Encourage transparency in communication. Managers and supervisors should be encouraged to pass on information to the best of their ability, with the information available at the time.

Key action: Translate FP&M values into appropriate behavior. Examples include:

- Providing training, coaching and mentoring on what behavior is appropriate and required to achieve an inclusive work environment;
- Communicating that all employees will be accountable for appropriate behavior (i.e. management will not tolerate discrimination, etc.); and,
- Promoting cultural understanding by communicating what it means to behave respectfully in FP&M.
- *Completed:* Created business cards with FP&M mission, vision & core values.
    - Translated into Spanish, Chinese, Hmong and Tibetan.
    - Distributed at all staff meetings and division events

Key action: Help employees find/use their voice. Provide training, coaching, mentoring to assist employees in respectfully communicating needs, and stopping objectionable behavior (e.g. Proactive Communication workshops are currently taught in-house; Mediation training taught thru OHRD).

Key action: Identify a means of reporting issues/barriers to respectful communication to person(s) who will take action to eliminate problems.

Key action: Make discussion of inclusion part of regular departmental meetings and of Leadership Team meetings. Engage in conversation to learn other perspectives and to avoid assumptions that lead one to misinterpret behavior.

Key action: Create a FP&M recognition program/system to reward employees who promote inclusion, engagement and diversity efforts in the workplace.

Key action: Create a 'welcoming' committee of employees trained to help new staff quickly become acclimated to the FP&M organization.

Key action: Assist supervisors in addressing long-standing issues that discourage inclusiveness (e.g. eliminate work unit exclusive 'cliques').

Appendix 5

FP&M Heritage and Gender Data - Updated for FY15

The chart below summarizes demographic information for FP&M for both 2012 and 2014. Overall data from the Vice Chancellor for Finance and Administration (VCFA) is included for purposes of comparison.

In 2012, the team used the FP&M Heritage and Gender Data as baseline data prior to identifying goals and Key Actions related to increasing representation and recruitment. The team members expressed disappointment that there had been little improvement in diversity since the first FP&M Equity and Diversity Team began studying this issue over a decade ago. However, members were optimistic that progress would be made because of the support of the FP&M Leadership Team, the unqualified support of the FP&M Associate Vice Chancellor (AVC), and the importance this issue has been given by the Office of the Vice Chancellor for Finance and Administration.

In general, the team agreed that increasing the number of persons of color, and attaining gender diversity are the primary goals. Specifically, actions should be taken to increase diversity across job classifications. The most diverse section of the organization is the non-exempt category. Although the data is not available at the unit level, the assumption is that most of this diversity exists in custodial positions, which are among the lowest paying positions in the organization. Steps should be identified to continue to support the diverse population within this unit, while also taking actions designed to provide for upward mobility throughout the organization.

The team identified the data needed to conduct a more thorough analysis of the demographics of the organization:
- Detailed demographic data by department and work unit;
- Data pertaining to age; and,
- Demographic information for the employment pool (City of Madison, Department of Public Instruction (DPI) data).

			VCFA 2012		FPM 2012		VCFA 2014		FPM 2014
All Staff	Total		2359		936		2723		1097
	Minority		483		266		537		299
	% of Minority		20.5%		28.4%		19.74%		27.26%
	White		1838		657		2003		700
	Unknown		38		13		183		98
Executive	Total		106		22		79		14
Managerial	Minority		9		1		5		1
	% of Minority		8.5%		4.5%		6.33%		7.14%
	White		94		21		72		13
	Unknown		3				2		

			VCFA 2012		FPM 2012		VCFA 2014		FPM 2014
Non Exempt	Total		1131		558		1433		686
	Minority		369		242		430		271
	% of Minority		32.6%		43.4%		30.01%		39.45%
	White		740		307		861		327
	Unknown		22		9		142		88
Professional	Total		665		102		653		112
	Minority		76		9		69		10
	% of Minority		11.4%		8.8%		10.57%		8.85%
	White		580		90		563		100
	Unknown		9		3		21		2
Supervisory	Total		209		73		244		83
	Minority		15		5		14		7
	% of Minority		7.2%		6.8%		5.74%		8.43%
	White		191		67		221		74
	Unknown		3		1		9		2
Supervisory	Total		55		6		74		8
Professional	Minority		5				7		0
	% of Minority		9.1%		0.0%		9.46%		0.0%
	White		49		6		65		8
	Unknown		1				2		
Trades	Total		193		175		211		194
	Minority		9		9		10		10
	% of Minority		4.7%		5.1%		4.74%		5.15%
	White		184		166		194		178
	Unknown		0				7		6
All Staff	Total		2359		936		2723		1097
	Female		906		222		1100		283
	% of Female		38.4%		23.7%		40.07%		25.80%
	Male		1453		714		1623		814
	Unknown								
Executive	Total		106		22		79		14

			VCFA 2012		FP&M2012		VCFA 2014		FPM 2014
Managerial	Female		33		2		25		1
	% of Female		31.1%		9.1%		34.18%		7.14%
	Male		73		20		54		13
	Unknown								
Non Exempt	Total		1131		558		1433		686
	Female		415		159		580		215
	% of Female		54.1%		28.5%		40.47%		31.30%
	Male		716		399		853		471
	Unknown								
Professional	Total		665		102		653		112
	Female		360		39		358		43
	% of Female		54.1%		38.2%		54.82%		38.05%
	Male		305		63		295		69
	Unknown								
Supervisory	Total		209		73		244		83
	Female		62		13		70		12
	%of Female		29.7%		17.8%		26.89%		14.46%
	Male		147		60		174		71
	Unknown								
Supervisory	Total		55		6		74		8
Professional	Female		28		2		38		3
	% of Female		50.9%		33.3%		51.35%		37.50%
	Male		27		4		36		5
	Unknown								
Trades	Total		193		175		211		194
	Female		8		7		10		9
	% of Female		4.1%		4.0%		4.74%		4.64%
	Male		185		168		201		185

Appendix 6

Mission, Vision, and Core Values of Facilities Planning and Management

FP&M Mission Statement
Providing excellence in facilities and services for our university community.

FP&M Vision Statement
An inclusive and diverse team, working together to provide exceptional service for our university community.

FP&M Core Values
People-centered
Inclusive, engaged, diverse and customer-focused

Stewardship
Sustainable, effective and efficient use of resources

Integrity
Trust, respect, accountability

Innovation and discovery
Through continuous learning and improvement

Safety
Ensuring a safe and healthy campus environment

Appendix 7

Division of Facilities Planning & Management Departments

Office of the Associate Vice Chancellor (AVC)
The Office of the AVC provides support services to all units of FP&M in the areas of budget and financial reporting, business operations and purchasing, human resources, and training and organizational development.

Campus Planning and Landscape Architecture (CPLA)
CPLA works with faculty, staff, students and the surrounding urban community on physical planning issues, including implementation of the Campus Master Plan. Staff assist with the capital budgeting and infrastructure planning processes, assist with facility-related ADA issues, design and manage landscape architecture projects, and serve as a liaison with municipal governments and adjacent neighborhoods.

Capital Planning and Development (CP&D)
CP&D is responsible for identifying and developing capital programs and related policies and procedures to address the University's strategic, long-range physical planning needs. Staff oversees development of the biennial capital budget and serves as university representatives and project managers for the design of new facilities, additions, utility improvements and large scale remodeling projects.

Environment, Health and Safety (EH&S)
EH&S provides guidance, technical consultation and expertise to the campus community in the areas of biological, chemical, environmental, radiation, lake, and fire and life safety.

Physical Plant (PP)
PP is responsible for the maintenance of campus buildings, grounds, utilities and vehicles. Design resources, construction trades and specialized facilities services are available for departmental requests and remodeling projects on a fee-for-service basis.

Space Management Office (SMO)
SMO collects, maintains and analyzes information about University space use. The office coordinates the allocation and reassignment of existing space and participates in the planning for modified or new space. This includes providing appropriate office, laboratory or support space for research and instruction, as well as classroom environments for effective teaching and learning, and support services for use of multimedia classrooms. The office also provides support for leasing space, manages campus real estate transactions, and assists with space relocation for major remodeling projects.

Transportation Services (TS)
TS is responsible for the coordination and administration of all transportation-related services for the University of Wisconsin-Madison campus community. Primary functions include the sale/management of parking permits, special event coordination, maintenance and enforcement, construction coordination, lot and booth operations, citation payments and appeals, information technology, financial, transportation planning and development of multi-modal options.