



Finance DEIB Action Plan

Dartmouth Finance is dedicated to upholding a culture that prioritizes excellence, service, continuous improvement, and communication. This initiative leverages these positive attributes and fosters a commitment to our core principles by all members of the Finance team. These principles are centered on a strong dedication to understand and incorporate vital elements of diversity, equity, inclusion, and belonging in order to improve the experiences for our staff as well as the services and processes we offer.

Finance Overview and Objectives

Finance Mission Statement

We efficiently deliver high quality services and information to enable the dynamic aspirations of Dartmouth's faculty, students, and staff.

Core Principles

Our mission is supported by principles of collaboration, innovation, integrity, and efficiency.

- **Collaboration** - Understand and embrace the diversity of our customers and their needs; Maintain transparent and collaborative communication with our community and across teams
- **Innovation** - Instill a culture of empowered problem solving, experimentation, and continuous learning; Enable agile response in a rapidly changing world
- **Integrity** - Ensure that operational policies, processes, systems and data are streamlined and standard across the institution; Maintain and enhance an effective control environment
- **Efficiency** - Prioritize work effectively in an environment of constrained resources

Aligning with Toward Equity

The Finance DEIB Action Plan will support and align with the institutional Toward Equity Strategic Plan through the four areas of priority: Coordination, Structure, Accountability, and Assessment.

- 1) **Coordination:** Finance will be a resource in coordination and cooperation with the IDE division and a partner in the pursuit of aligning institutional priorities and institutional recruitment and retention efforts.
- 2) **Structure:** In support of building systems and structures to improve inclusive and equitable experience for staff, faculty, and students, Finance will continue to develop our team's understanding of creating a community of belonging and inclusivity. Each member of our community has a responsibility to ensure interactions and decisions are unbiased, fair, equitable, and inclusive and that we are proactively creating a space where everyone feels safe and included.
- 3) **Accountability:** Finance will support all efforts to create clear accountability and reporting systems and will participate and engage in IDE forums designed to discuss diversity, equity, inclusion, and belonging, and the necessary training and education initiatives for leaders and staff.
- 4) **Assessment:** Finance will have an integral role in supporting and assisting the development of tools for gathering, evaluating, and assessing our policies and procedures that impact the experience for our staff, faculty, and students.

Call to Action:

Toward Equity emphasizes accountability and communication from institutional leaders, and notes that every member of the Dartmouth community has a role and responsibility to contribute to its success by:

- Developing personal goals to contribute to a more inclusive and welcoming environment.
- Proactively completing training modules, participating in workshops, and attending lectures and programs that center diverse perspectives.
- Participating in divisional action plan development and implementation
- Sharing feedback through institutional surveys.

We all play a role in moving Dartmouth Toward Equity

Finance DEIB Action Plan Goals

Organization Goals	DEIB Long-Term Goals	DEIB Goals
<p>1. Promote Financial Integrity and Transparency</p> <ul style="list-style-type: none"> • Ensure appropriate compliance in the areas that we oversee • Enable collaborative planning and decision making through excellence in reporting and analytics <p>2. Provide Exceptional Service</p> <ul style="list-style-type: none"> • Encourage collaboration, standardization and support across Dartmouth • Embrace new technologies that drive efficiencies and collaboration <p>3. Develop Highly Functional Team</p> <ul style="list-style-type: none"> • Support continuous improvement by focusing on learning, development, and improving processes and performance • Develop our workforce to support evolving needs and requirements • Reinforce and strengthen our commitment to Diversity, Equity, and Inclusion and Belonging 	<p>1. Improve staff engagement and satisfaction through inclusion and empowerment efforts.</p> <p>2. Improve community satisfaction and engagement through inclusion and staff understanding and service.</p> <p>3. Attract and retain a diverse workforce for improved operational efficiency, and effective decision-making and service.</p> <p>4. Individual and team performance linked to organizational goals.</p>	<p>1. Ensure Finance DEIB goals are consistent with Dartmouth’s DEIB strategic plan.</p> <p>2. Offer opportunities for continued learning and engagement with diversity, equity, inclusion, and belonging initiatives, developing awareness, and understanding of diversity, racial and social justice, and inclusiveness.</p> <p>3. Expand and reinforce our commitment to increasing the diversity of our community and networks by ensuring inclusive policies, practices, attitudes, and actions (e.g., supplier diversity, using DEIB as a factor in vendor evaluations for Finance-procured services).</p>

FY2024 DEIB Action Plan Accomplishments

The FY2024 DEIB Action Plan for Finance served as the groundwork for shaping the FY2025 DEIB Action Plan, reaffirming Finance’s commitment to fostering a more diverse and inclusive environment at Dartmouth. Throughout FY2024, the Finance DEIB Steering Committee remained dedicated to facilitating DEIB Discussions and advancing DEIB learning opportunities.

In the pursuit of a deeper organizational understanding, the committee strategically focused on assessing the current state of Finance, the needs, and aspirations of both individuals and business units. This involved conducting DEIB Business Unit discussions and a comprehensive staff survey. Impressively, the DEIB Steering Committee engaged with all 14 business units and garnered a robust 76% response rate from 85 Finance staff members, gathering valuable insights into Finance’s mission, leadership, and engagement.

To enrich our comprehension further, Finance Leadership embarked on one-on-one culture conversations with every division staff member. This triad of approaches—group discussions, anonymous surveys, and personal interactions—aimed to ensure a comprehensive feedback collection process, fostering inclusivity and transparency within the division.

The outcomes of the FY2024 DEIB Action Plan efforts provided an updated baseline for staff satisfaction, with 87.1% of employees overall being either somewhat or strongly satisfied with the state of Finance. Ratings within “mission and purpose,” “leadership, planning, and culture,” and “roles and resources” received higher marks with ranging in the high 80 – high 90% percentile, while questions pertaining to “opportunities for advancement” and “adequate staffing” offer overall room for improvement.

In the calendar year 2023, the DEIB Steering Committee hosted 10 DEIB Discussions covering topics such as fostering a culture of belonging and understanding bias and privilege. Throughout the year, approximately 280 employees from Finance, Finance Centers, Human Resources, Safety & Security, and the Investment Office took part, with monthly attendance ranging from 20 to just over 30 staff members. These sessions provided a platform for learning through articles, videos, and group discussions. They also facilitated open dialogue, enabling participants to practice engaging in conversations about important DEIB topics in a safe and supportive environment conducive to sharing and connection.

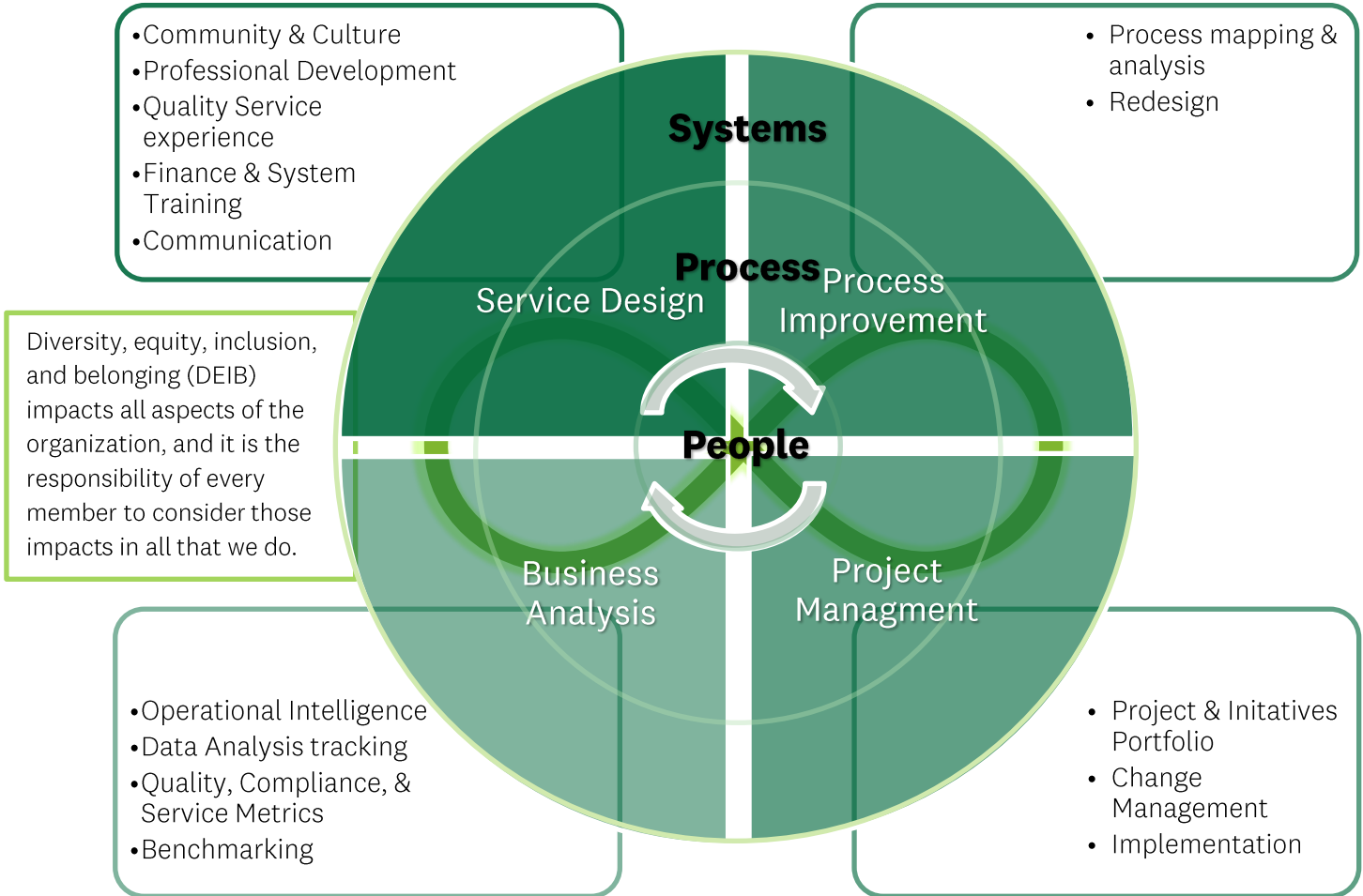
Additionally, the C3I two-part Gender-Bias training concluded in June, comprising 6 sessions. While participation varied, 23 individuals completed the training.

Communication and connection remain a central topic and highlighted the diverse experiences and needs among our teams. Our organizational culture and inclusivity efforts will continue to focus on ongoing development and discussion about belonging, trust, and engagement. There is a desire to increase the opportunity for cross-departmental and divisional collaboration, as well as opportunities to connect with colleagues outside of work, to foster understanding, connection, communication, and belonging. There is a need to provide some guidance and standardization on how Finance communicates amongst our teams and sets expectations around open and transparent communication.

Continuing to Build on our Strengths

This initiative's objective is to foster support and empowerment for our staff within Finance and across the institution. We aim to achieve this through individual growth, professional development, and self-awareness, which will strengthen our emotional intelligence and organizational effectiveness. By leveraging our cultural strengths, we can deepen our understanding and better integrate our core principles. These collective endeavors will facilitate our ongoing progress of purposefully integrating a mindfulness toward diversity, equity, inclusion, and belonging.

Finance Organizational Effectiveness



Key Strengths:

In Finance, our people are our strength. By reinforcing and further integrating our core principles, and committing to continuous development of our people, processes, and systems, we aim to achieve the following outcomes:

- More empowered and engaged staff.
- Enhanced customer satisfaction levels.
- Improved retention rates of top talent and increased opportunities to recruit a more diverse staff.
- Reduced inefficiencies resulting from disengaged staff and defective processes, services, and systems.

Benefits to the Organization:



Action Steps

	What?	Frequency?	Who?
Activity 1	Expand Professional Development leveraging Big Think+ <i>Weekly a new Big Think+ suggested video will be posted to the new DEIB Channel within the F&A Staff Team and will provide a monthly reminder through the Finance & Admin Update</i>	Bi-Weekly/ Monthly	DEIB Steering Committee
Activity 2	DEIB Discussions continued <i>The DEIB Steering Committee will continue to host DEIB Discussions to continue to develop individual awareness and comfort in engaging in diversity topics.</i>	Monthly	DEIB Steering Committee
Activity 3	DEIB Book Club <i>The DEIB Steering Committee will host a DEIB Book Club to encourage expanding knowledge, awareness, and perspectives in diversity, equity, and inclusion related topics.</i>	Quarterly	DEIB Steering Committee
Activity 4	Culture Awareness Program <i>The DEIB Steering Committee will host a culture awareness program to allow members of our community to share their cultural experiences and expand understanding and perspectives.</i>	2 Annually	DEIB Steering Committee
Activity 5	"How we communicate" Working Group <i>This group will draft a recommendation document to Finance Leadership, setting expectations on tools, usage, and response to bi-directional communication.</i>	January - March	DEIB Steering Committee
Activity 6	"Professional Development Resources" Working Group <i>This group will draft a document articulating divisional expectations and resources for professional development, including funding to attend conferences, workshops, or continuing education for maintaining professional certifications.</i>	January - March	DEIB Steering Committee
Activity 7	Community of Interest Group <i>The Community of Interest groups will develop opportunities for individuals to gather outside of the workplace, share the joy of common interests, be it enjoying the outdoors, sports, crafts, or reading. If you are interested in leading or participating, or have other community of interest group ideas, please reach out to the DEIB Steering Committee. Let's do this!</i>	Ad hoc	DEIB Steering Committee with F&A Community involvement
Activity 8	Supplier Diversity Program	FY25	Tammy Moffatt
Activity 9	Procure-to-Pay Guide	FY25	Tammy Moffatt

Measuring The Impact

Defining Measurements of Success		Quantitative Measures	Qualitative Measures
DEIB Professional Development	Big Think+	Metrics Request from IDE on Divisional Participation	Working to develop habits of consistently seek DEIB learning opportunities and content
	DEIB Discussions continued	Participation metrics	Employee satisfaction and engagement
	DEIB Book Club	Participation metrics	Employee satisfaction and engagement
	Culture Awareness Program	Participation metrics	Employee satisfaction and engagement
Expanding Community Engagement	"How we communicate" Working Group	Increased satisfaction of how we communicate & engagement	Improved leadership/employee/team engagement & participation metrics
	"Professional Development Resources" Working Group	Increased employee awareness and participation in Professional Development opportunities and funding	Increased employee awareness and participation in Professional Development opportunities and funding
	Community of Interest Group	Number of Community of Interest groups formed, participation, and frequency	Employee satisfaction and engagement

Terminology and Definitions

Institutional Key Terms from IDE Toward Equity

Diversity: includes attributes such as race, gender identity, age, ethnicity, ability, national origin, religion, sexual orientation, and socio-economic status, among other aspects of identity. The composite of the various backgrounds present in the Dartmouth community makes the campus diverse. Diversity coupled with equity, inclusion, and belonging allows for optimal creativity, innovation, and academic excellence.

Equity: is successfully creating structures and systems that disrupt existing and potential barriers to individual success and ensuring that we treat all persons fairly. Our progress toward equity, diversity, inclusion, and belonging addresses the historical legacies of exclusion, promotes social justice, and equips every member of our community to thrive.

Inclusion: is an active, intentional, and ongoing individual and organizational effort in which we treat people from diverse backgrounds or identities equitably, welcome them into our social and cultural circles, and include them in decision-making. The result of effective inclusion efforts is belonging.

Belonging: refers to a personal sense of feeling seen and valued for being our authentic selves. We experience and reinforce belonging through cultural messaging that each member of the community purposefully creates.

Finance DEIB Action Plan and Core Values Key Terms:

Agility: is the ability to move quickly and easily; think and understand quickly; nimbleness.

Culture: is the unspoken social order of an organization characterized by shared assumptions, beliefs, values, and expectations.

Continuous Improvement: is a constant, ongoing effort to improve (people, processes, services, systems).

Emotional Intelligence: is the ability to understand and manage one's own emotions (self-awareness, self-management) and understand the emotions of others (social-awareness, relationship-management).

Organizational Effectiveness: is an organization's self-awareness of, and the degree to which it can achieve, its goals.

Transparency: is the act of both good and bad information being shared upward, downward, and laterally in a way that allows all to see the why behind the words. The benefits of transparent communication are increased collaboration, enhanced trust, and increased innovation.

Finance DEIB Initiatives

Supplier Diversity Program

The Supplier Diversity Program, in collaboration with Institutional Diversity and Equity, will proactively seek to educate and promote the participation and use of diverse suppliers. Leveraging existing data, this program will realign diverse supplier data to industry standards, enhance diverse classification data capture, systems, and reporting to improve metrics and monitor progress. Also, this program will reduce barriers to engaging with diverse suppliers and incentivize their use in purchasing activities.

Procure-to-Pay Guide

The Procure-to-Pay Guide will support the efforts of the Supplier Diversity Program, by enhancing the identification and promotion of diverse suppliers. Additionally, the Procure-to-Pay Guide will enhance accessibility, presentation and clarify the process for sourcing, purchasing, and paying vendors.

DEI Tracking Project

The DEI Tracking Project, in collaboration with Institutional Diversity and Equity, Finance & Administration, Fiscal Officers, and Divisional leaders will develop mechanisms to track and assess current expenditures related to diversity, equity, and inclusion initiatives and the College's annual funding commitments related to DEI. By assessing the current level of financial and human resources dedicated to this work, Dartmouth can make the best determination for how to allocate existing operational funds and identify gaps where fundraising can support new DEI initiatives. *(from Toward Equity Strategic Plan: Assessment and Aligning of Resources, page 8)*

Finance Business Partners Evaluation

This initiative will evaluate the diversity characteristics of business partners and other service providers and seek out opportunities to improve DEI in whom we work with and spend institutional resources.