



## **Diversity, Equity, and Inclusion Action Plan**

October 2018

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## EXECUTIVE SUMMARY

This plan details the necessary actions and concrete plans the school will take to achieve our shared vision of a more diverse and inclusive student body that meets the standards we all expect of Berkeley Haas. The Management Team, including our interim Dean Laura Tyson and new Dean Ann Harrison, commit to implementing these actions and will be accountable for results over the short and long term. We pledge to work on codifying our school-wide vision for diversity, equity, and inclusion (DEI) that is inclusive of our entire Haas community – students, staff, faculty, and alumni.

Over the past two years, Haas experienced a downturn in enrollment of African American students in our Full-time MBA (FTMBA) program at the same time that our incoming class size grew from 252 to 291 students. The drop in the number of African American students follows eight years of increasing enrollment of African American and underrepresented minority (URM<sup>1</sup>) students. It is important to note that Latinx student enrollment and enrollment of other URM populations, including Pacific Islanders and Native American students, also lags relative to their representation in the state or national population. This is true for all of our degree programs.

Our leadership team failed to react quickly or urgently enough. The leadership approached the data using an “academic” lens. We looked at the positive previous eight year trend of increasing African American enrollment and saw the sudden decline as a two-year statistical anomaly. Even if historically this may have been within our normal range, it doesn’t make our response acceptable -- we should never become comfortable with a norm of underrepresentation. We need to live up to all of our Defining Leadership Principles and question the status quo. Our actions need to match our intentions. Our slowness to act broke trust with our students and alumni. We are deeply sorry about this.

We are fortunate to have dedicated students and alumni who have continued to put in a tremendous amount of work over many years towards positively impacting change around diversity, equity, and inclusion. Our Haas Alumni Diversity Council (HADC), made up of alumni and VPs of Diversity from our MBA programs, as well as Haas student leaders from the Consortium<sup>2</sup>, Black Business Student Association (BBSA), and Latinx Business Club, have been strong partners in advising our leadership and pushing the school to do more. Additionally, the student-led Race Inclusion Initiative (RII), launched in 2016, was created “to promote racial equity by advocating for a racially diverse and inclusive environment at Haas while equipping students to lead diverse and inclusive teams.” We give credit to our students and alumni for their recommendations that form the foundation of this action plan. With their

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<sup>1</sup> URM includes US citizens and permanent residents who identify as Black, Hispanic/Latino, Native American/Islander or multiethnic.

<sup>2</sup> The Consortium for Graduate Study in Management is an alliance of top business schools working in partnership with corporations to encourage diversity in business.

valuable insights, research, consultancy, and advocacy we have developed much more robust actions to impact real change.

In developing our action plan, we focused on three objectives:

- Rebuild trust with underrepresented minority students and alumni, and allies;
- Make Haas a community that African American and all underrepresented minority students want to join;
- Increase outreach to and yield of underrepresented minority students at Haas.

Here is a summary of the actions included in our plan:

### **Admissions**

1. Change MBA admissions criteria to consider an applicant's skill set and experience in the areas of diversity, equity, and inclusion that enhance their contributions to the curricular and co-curricular environment, such that it enables Haas to achieve its goal of developing equity-fluent leaders.
2. Establish a Diversity Admissions Council representing a cross-functional group of staff, faculty, students and alumni and hire up to 2 second-year FT MBA students to serve on the FT MBA Admissions Committee as paid student positions with the purpose of facilitating greater transparency, communication, and accountability.
3. Hire a Director of Diversity Admissions with focus on expanding opportunity for all historically underrepresented communities.

### **Scholarships and Outreach**

4. Significantly increase scholarship funding and pursue options outside of the University that can provide scholarships directly to URM students; reduce barriers to applying for scholarships and adopt a first offer-best offer approach to financial aid.
5. Adopt a stronger relationship management approach to URM student recruitment to improve yield and create stronger relationships with URM candidates; establish a long-term URM outreach approach by expanding the MBA applicant pool through direct communications with recent URM undergraduates.

### **Diversity, Equity, and Inclusion Approach**

6. Senior Leadership commits to lead with a shared diversity, equity, and inclusion vision for Haas, engaging in ongoing training, working toward a deeper understanding, and infusing this vision throughout our school.
7. Hire a Chief Diversity, Equity, and Inclusion Officer, who reports directly to the Dean, and is responsible for informing, assessing, and executing the school's DEI plan with the goal of achieving a more diverse, inclusive, and equitable Haas.
8. Improve support for current URM students across degree programs through increased funding for diversity initiatives developed by affinity groups or other student-led initiatives, financial support for diversity-related case competitions and academic endeavors, and funding for periodic events for URM community building (staff, faculty, students, alumni); increase staff responsibilities/support for key school diversity events.

9. Evolve staff hiring policies/practices by adding explicit language in job postings to address diversity needs within teams and encourage candidates from diverse backgrounds; ensure hiring committees are more representative and that they have done significant outreach to and considered candidates from diverse backgrounds.

Throughout this 30-day process, we involved many stakeholders. A team consisting of Courtney Chandler, Senior Assistant Dean and Chief Strategy & Operating Officer; Jay Stowsky, Senior Assistant Dean of Instruction; Delphine Sherman, Chief Financial Officer; Bill Pearce, Chief Marketing Officer & Assistant Dean; Pete Johnson, Assistant Dean of FT MBA Program; Érida Bautista, Director of Inclusion & Diversity; Marco Lindsey, Dean's Chief of Staff; and Susie Jordan, Project Manager, Strategy & Operations met daily over the last 30 days. Each of us consulted with various stakeholders throughout the process, including FT MBA student leaders representing RII, Consortium, BBSA and the Latinx Business Club and the leadership of the HADC. Input sessions were held with our Senior Leadership Team, and our executive directors/directors in admissions, degree program offices, career management, financial aid, and our centers/institutes. We updated our faculty at our Professional Faculty Breakfast and our Executive Committee (chairs of our academic groups) meetings in late September.

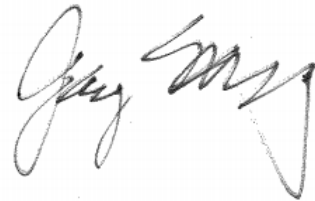
Included in this report is a detailed plan of each action outlined above, with next steps, deadlines, staff owners and respective financial impact. We have also added two supporting documents describing actions already taken (since Fall 2017) and initiatives underway as well as our 5-Year Diversity, Equity, and Inclusion Strategic Plan. In the coming weeks, we will review our action plan at our October Management Team and Senior Leadership Team meetings to confirm commitment and accountability. We will discuss our action plan with our Haas Advisory Board and our tenure-track faculty at respective meetings in mid-October. Finally, we will dedicate our November Staff Town Hall to diversity, equity, and inclusion and discuss our action plan with staff school-wide.

Creating this plan is just the beginning. We have much work ahead. We commit to making this plan public and to providing updates on milestones along the way.

Sincerely,



Courtney Chandler  
Senior Assistant Dean,  
Chief Strategy & Operating Officer



Jay Stowsky  
Senior Assistant Dean of Instruction

## ADMISSIONS

- **Action #1: Change MBA Admission Criteria**
  - **Action #2: Establish Diversity Admissions Council and Hire Student Admissions Officers**
  - **Action #3: Hire Director of Diversity Admissions**
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### **Action #1: Change MBA Admission Criteria**

This action adds criteria and reflects additional weight in the evaluation process related to Haas' goals of producing equity-fluent leaders.

#### Background

The admissions criteria for the FT MBA program currently include **Academic Aptitude/Performance** (GPA, trend in grades, quantitative proficiency, GMAT or GRE scores, etc.); **Professional Accomplishments** (work history, career progressions/promotions, evidence of leadership/managerial ability and skills, impact applicant has had on their organization); and **Personal Characteristics** (extracurricular/community activities including depth and breadth of involvement and demonstration of leadership); clarity of goals, understanding of why an MBA, fit with defining leadership principles and culture of the school, command of written English.

#### Proposed Actions

1. *The Dean's Office wants professional and personal experience demonstrating commitment to diversity, equity, and inclusion to have greater consideration in the admissions criteria.* This goal is consistent with scholarship around the effectiveness of diverse teams and with creating equity-fluent leaders who will contribute to diversifying the business community, both in the Bay Area/Silicon Valley and across the country.
  - Formally revise the application review and interview process to more systematically include applicant's experience in the areas of DEI.

#### Rationale

1. *Giving greater consideration to the applicant's experience and passion for creating diverse and inclusive communities will enable Haas to achieve its goal of creating equity-fluent leaders.* This broadens the definition of excellence, and may enable Haas to enroll students who will be attractive graduates for employers who are seeking equity-fluent leaders and increased diversity.

#### Financial Impact

Financial impact will be minimal.

#### Next Steps

- Consult with FT MBA Program Committee regarding changes – November 2018 (Johnson).
- For Fall 2019 applicants, revise FT MBA application review process and add a question to the interview designed to assess applicant's level of experience, passion, and commitment to diversity and inclusion to assist the admissions committee in determining candidate strength – November 2018 (Bernstein and in consultation with Bautista).
- Implement changes to application for Fall 2020 admits – Summer 2019 (Bernstein).

## **Action #2: Establish Diversity Admissions Council and Hire Student Admissions Officers**

This action recommends the creation of a Diversity Admissions Council and the hiring of up to 2 students to serve on the FTMBA admissions committee.

### Background

Students, alumni and the Dean's Office are calling for increased transparency, communication, and shared accountability in our admissions process. Upon review of the FTMBA admissions process with regard to URM applicants, we have identified two critical areas needing improvement: 1) proactive communication between MBA admissions teams and the Dean's Office, faculty, students, and alumni on URM admissions trends; and 2) shared accountability for increasing URM representation in our student body across programs.

### Proposed Actions

1. *Establish an MBA Diversity Admissions Council reflecting a cross-functional group with membership including staff, faculty, students, and alumni. The purpose of the group will be to identify and assist with FTMBA URM recruitment and yield strategies and goal setting; monitor URM metrics; enhance coordination and effectiveness of diversity admissions outreach; and provide tangible feedback with the goal of ensuring Haas is enrolling a diverse student body.*
2. *Hire up to two second-year FTMBA students to serve part-time on the FTMBA Admissions Committee, provide input on admissions decisions and help with recruiting; these will be paid positions.*

### Rationale

1. *Earlier communication of admission trends will give Haas time to take corrective action if needed. Constant communication about admissions trends will enable Haas to change course or enhance resources to improve outreach and impact yield.*
2. *A cross functional team will bring different perspectives. By creating a cross-functional group made up of staff, faculty and students, we will be able to get a broad-range of perspectives on how to proactively address URM enrollment issues resulting in increased support to the FTMBA admissions team.*
3. *Student participation will increase decision transparency. Including FTMBA students as hired members of the FTMBA admissions team, provides valuable training to students on how to evaluate prospective candidates, and allows for increased transparency with admissions.*

### Financial Impact

Increased budget for FTMBA admissions to hire and train up to 2 student admissions officers at a 25% appointment equivalent to 10 hours a week.

### Next Steps

- Haas Alumni Diversity Council to nominate an alum to serve as co-chair – October 2018 (Stowsky).
- Partner with RII student leaders to build on their recommended structure for the council and invite other members to serve - October 2018 (Stowsky and Chandler).
- Convene first meeting to discuss charge, decision rights and timeline – November 2018 (Stowsky and Mitchell).
- Submit request to Staff Personnel Committee to hire student positions – October 2018 (Bernstein).

- Post position and begin recruitment of student positions – November to December 2018 (Bernstein).
- Council establishes bylaws/processes/procedures, determines frequency of meetings and term of membership – November 2018 to January 2019 (Stowsky and Mitchell).
- Explore Diversity Admissions Councils for our other 5 degree programs (EW MBA, EMBA, UG, MFE and PhD) – Spring/Summer 2019 (Stowsky).

### **Action #3: Hire Director of Diversity Admissions**

This action recommends hiring a new role of Director of Diversity Admissions to focus on expanding outreach and recruitment of prospective students from all historically underrepresented communities.

#### Background

From 2012-2017 Haas had a part-time Director of Diversity who was involved in MBA outreach and recruitment. There was also a role within FT MBA Admission that had a specific focus on diversity during a similar timeframe. Although we have adjusted/added staff resources through the Director of Inclusion and Diversity, we need a staff member dedicated to diversity outreach and recruitment within admissions.

#### Proposed Actions

1. *Hire a Director, Diversity Admissions, with focus on outreach and recruitment strategy of prospective students from all historically underrepresented communities (URM, LGBTQ, Women, Vets, Disability, Religious Minorities), oversight of Consortium and diversity-based scholarships and ongoing capacity building within the admissions committee.*

#### Rationale

1. *The URM market for MBA students is extremely competitive. Haas needs dedicated staff resources to develop and execute strategies related to outreach and enrollment.*
2. *Creating this role will send a strong signal to prospective students that Haas is dedicated to increase enrollment of URM students.*
3. *This role will build capacity within the admissions team to strengthen diversity outreach.*

#### Financial Impact

Salary and benefits for level and job classification.

#### Next Steps

- Approval by Staff Personnel Committee – October 2018 (Chandler and Stowsky)
- Develop job descriptions and begin search – November to December 2018 (Johnson and Boyd)



## SCHOLARSHIPS AND OUTREACH

- **Action #4: Increase Scholarship Funding and Reduce Barriers to Applying for Scholarships**
  - **Action #5: Adopt Stronger URM Recruitment Process and Practices and Establish Long-term Outreach Strategy**
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### **Action #4: Increase Scholarship Funding and Reduce Barriers to Applying for Scholarships**

This action focuses on increasing our overall scholarships budget and funding that goes to URM students, and adjusts our scholarship approach.

#### Background

Research on comments from admitted students who chose not to attend Haas indicate that the timing of our scholarship offers and the financial competitiveness were a significant issue.

#### Proposed Actions

1. *Significantly increase amount of scholarship funding* and pursue a vehicle that would allow us to provide scholarships directly to URM students:
  - Provide assistance to an outside non-profit entity responsible for raising and awarding \$25M more in scholarship funding over the next five years for URM students.
  - Propose up to a 6% increase in FT MBA student fees each year for the next five years and direct the majority of the increase in funding to FT MBA scholarships.
2. *Reduce barriers to applying for FT MBA scholarships* and adopt a first offer-best offer approach to financial aid.
  - Eliminate separate scholarship application unless required by the donor or department offering the award.
  - Adapt timeline such that scholarship decisions are awarded at the time of admission whenever possible.
  - Eliminate applicant self-selection of a menu of scholarship categories.
  - For Fall 2019 Consortium applicants, increase scholarship awards for admits. We recognize, however, that Consortium applicants are not necessarily URM.
  - Offer Consortium students need-based grants, if eligible, to defray the high cost of living expenses (above the full tuition scholarship the applicant may have received).
  - Provide admissions with a larger range of scholarship funding so that more funding can be awarded in Round 1
  - Use admissions application responses from socio-economic questions in conjunction with other data in determining leadership and need-based awards.

#### Rationale

1. Although data is not public and our peer schools do not release data, *we know that Haas currently has much less funding available for scholarships based on admitted student feedback.*
  - Haas' endowment is significantly less than peer schools.
  - Tuition of our FT MBA program is 15% less (more than \$10,000 less per student annually) than peer schools.

- Most of Haas' FTMBA direct competitors are private schools, who provide gender and ethnicity-based scholarship awards.
2. *Haas' scholarship application and awarding process could be streamlined:*
- Most scholarships required a secondary application available to students after they had been offered admission to the program. As a result, many scholarship awards were not given at the time of admission; students admitted to the program had to wait to receive a decision about their scholarship funding.

### Financial Impact

Increase in revenue from philanthropy and student fees to support a significantly larger amount of scholarship funding over the next five years. No net impact on five-year budget.

### Next Steps

- Develop a strategy and case for funding to increase long-term scholarship efforts for all degree programs – March 2019 (Sherman and Schibsted).
- Submit Professional Degree Supplemental Tuition (PDST) request to the UC Regents to use increased PDST for scholarship funding – October 2018 with decision by Spring 2019 (Sherman).
- Decide how the Socio-Economics Status (SES) application questions will be incorporated into the scholarship award process – December 2018 (Lopez and Bernstein).
- Decide on split between need based and merit based awards after better understanding relationship between need-based awards and impact on yield for all students and yield of URM students specifically – November 2018 (Sherman and Johnson).
- Explore how we could enable scholarship strategy outside of our traditional channels – May 2019 with an Interim report by December 2018 (Sherman).

### **Action #5: Adopt Stronger URM Recruitment Process and Practices and Establish Long-term Outreach Strategy**

This action focuses on how we will adjust our URM recruitment approach; from initial contact to enrollment and how to expand the talent pool of URM MBA candidates.

### Background

To win highly recruited URM candidates, we need to provide personalized follow-up. Research conducted by Haas Marketing identified a key insight – ~80% of applicants attend a school that was on their initial shortlist of 3-5 schools. Students make up their shortlist very early in their selection journey. Therefore, to expand your applicant pool we have to focus on potential applicants that are 12-18 months out from enrollment.

### Proposed Actions

1. *Adopt a stronger Relationship Management approach to URM students.* Actively engage URM candidates through our involvement in MLT<sup>3</sup> and the Consortium and continue to pursue high potential candidates with personalized outreach including phone calls and offers to connect with current students or alumni; by steering them to all available resources to create their strongest application; and by encouraging them to keep Haas top of mind in their decision process.

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<sup>3</sup> Management Leadership for Tomorrow (MLT) equips and emboldens high-achieving women and men from underrepresented communities to realize their full potential, to make a mark and make a difference.

2. *Prototype the development of a proprietary database of URM candidates to expand the applicant pool and increase shortlist selection.* The objective is to identify and communicate broadly with URM candidates who have demonstrated strong academic achievement, early enough in their decision journey that we can impact their shortlist selection. We can create a proprietary database of potential applicants, based on their graduation year to influence: 1) decision to pursue an MBA; 2) school selection; and 3) becoming the lead candidate on their shortlist.

#### Rationale

1. *The URM market is extremely competitive. Lengthening our contact time frame from starting an application to decision improves our ability to persuade applicants.* Our designated recruitment team has to build a personal one-to-one relationship with the applicant to explain the Haas difference.
2. *Improve personal preference.* We hope to make the admissions and decision process more personal (“this is where I am comfortable and want to be”) and less financial (“where is my lowest cost of attendance and/or highest ranked school”).
3. *Increased contact will generate strong referrals and word-of-mouth endorsements.* We should build a “refer a friend” conversation into the dialogue.
4. *We are potentially expanding the applicant pool while reducing competitive pressure.* We currently rely on GMASS data that we purchase, and students who have joined the Consortium or MLT to develop a target applicant pool. However, this is what all of our competitors do too. By creating a proprietary list, we can expand the applicant pool by talking to people who are qualified but maybe not be thinking about an MBA, thereby getting a jump on competition with a corresponding impact to successfully shortlist Haas.

#### Next Steps

- Identify staff on the admissions team to track prospective URM students – October 2018 (Bernstein).
- Revise our process for collecting data with the goal to determine a way to identify URM prospects sooner in the application process at the pre-applicant stage – November 2018 (Pearce)
- Develop a regular process to capture URM prospect data at an earlier stage – November to December 2018 (Pearce)

## DIVERSITY, EQUITY, AND INCLUSION APPROACH

- **Action #6: Senior Leadership Commits to DEI as Core Value**
  - **Action #7: Hire a Chief Diversity, Equity, and Inclusion Officer**
  - **Action #8: Improve Current URM Student Support**
  - **Action #9: Evolving Staff Hiring Policies/Practices – Equity-Fluent Staff**
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### **Action #6: Senior Leadership Commits to DEI as Core Value**

This action focuses on how the Haas Management Team will incorporate DEI into strategic planning, talent management, resource allocation decisions, and internal communication. We commit to shifting our mindset and reaching for a vision that builds on increasing diversity and strengthening belonging, and focuses on creating, deepening, and sustaining an inclusive environment at Haas where students want to come to learn about themselves and others and become equity-fluent leaders.

#### Background

It is critical that DEI responsibility is shared throughout the organization, and not the responsibility of one person or team. There is an opportunity and desire for senior leaders to learn more about DEI and begin to have a shared language for our conversations. Once this language and awareness has been learned and understood, the Management Team can begin to apply an equity lens to all major decisions and to hold their teams accountable for demonstrating equity fluency.

#### Proposed Actions

1. *Management Team, including our new Dean, attend a workshop on DEI. Eventually require other senior staff leaders to attend similar trainings. This will enable a shared level of understanding as a basis for our conversations.*
2. *Management Team develops an annual goal for evolving DEI at Haas that is monitored twice per year by the team. Goal is likely to be the successful and timely execution of the 30-day action plan and aligning with the Haas 5-Year DEI strategic plan. In addition, Management Team members are responsible for developing a DEI goal with their teams thereby enabling DEI goals to live everywhere in the organization.*
3. *The Management Team deepens our understanding of DEI. Management Team models defining principle of “Students Always” and reads and discusses a series of articles about implicit bias, microaggressions, privilege, and becomes more self-aware of the impact of our behaviors on others.*
4. *Increase the diversity pool for Haas senior leaders and ensure that hired talent is fluent in diversity and inclusion issues. Develop talent management plan to increase diversity of the senior team and include better outreach to people of color to ensure we are hearing and representing diverse perspectives.*
5. *Management Team supports and facilitates faculty’s commitment to diversity and inclusion.*

#### Rationale

1. *Successful implementation of our action plan requires the Management Team to adopt DEI as a core value. As currently structured, the Management Team does not have fluency in DEI issues and we are not grounded with a common equity-fluent language.*

We must invest time and financial resources to being trained and become more aware of the impact of our actions on a diverse community of staff, students, and faculty.

#### Financial Impact

Funds for senior leadership DEI training and professional development for the rest of the year. Ongoing funding earmarked each year for leadership professional development focused on DEI.

#### Next Steps

- Management Team members to attend DEI workshop – October 2018 to March 2019 (Management Team)
- Incorporate DEI action plan into Haas 5-Year DEI Strategic Plan and share with all stakeholders – December 2018 (Sherman and Bautista)
- Management Team to adopt a DEI goal for the year and write a DEI goal for each of their teams to include in the mid-year performance check-in – January 2019 (Management Team).
- Begin to adopt a framework for succession planning conversations with a focus on hiring, retaining, and promoting a diverse staff – Spring/Summer 2019 (Management Team).

#### **Action #7: Hire a Chief Diversity, Equity, and Inclusion Officer**

This action focuses on creating a new staff leadership role of Chief Diversity, Equity, and Inclusion Officer to shift our organization's approach to achieve a more diverse, inclusive, and equitable Haas. Adding this key role will rebuild trust through matching our words (plans) with action (execution).

#### Background

In 2011, Haas invested in and hired a part-time (50%) Director of Diversity. However, this was not enough to achieve our goals to increase representation and create a more inclusive environment. In 2014, we narrowed the scope of the role to focus on the students' experience: increasing representation and improving climate, but did not allocate necessary resources for execution. In 2018, Élica Bautista was hired into the expanded, full-time Director of Inclusion and Diversity role to inform school-wide strategy on student climate, across all degree-granting programs.

#### Proposed Actions

1. *Hire a Chief Diversity, Equity, & Inclusion Officer*, who reports directly to the Dean, sits on the Management Team, and is responsible for informing, assessing, and executing the school's DEI strategic plan. Our Director of Inclusion & Diversity will report to this new role. The Chief DEI Officer, once hired, can assess and recommend the staffing/org structure they need to be successful.

#### Rationale

1. *Dean Harrison and the Management Team need a senior leader (and advisor) with expertise in serving historically underrepresented communities* to carry out the school's DEI strategic plan and build capacity at the senior level of our school.

### Financial Impact

Salary and benefits for level and job classification and the Chief DEI Officer will need an increase in budget for initiatives.

### Next Steps

- Get feedback from Dean Harrison – October 2018 (Chandler and Stowsky)
- Approval by Staff Personnel Committee – October 2018 (Chandler and Stowsky)
- Develop job descriptions and begin search – November to December 2018 (Sherman and Boyd)

### **Action #8: Improve Current URM Student Support**

Haas will allocate additional resources to support our URM students across our degree programs and engage our URM alumni who are invested in increasing representation at Haas.

### Background

African American, Latinx, Pacific Islander, and Native American student enrollment has historically been low. We must work harder and put more resources towards supporting URM students throughout the program and make Haas a community that URM students want to join.

### Proposed Actions

1. *Improve support for URM students across degree programs through increased funding for:*
  - Diversity initiatives developed by affinity groups or other student-led initiatives
  - Financial support for diversity-related case competitions
  - Periodic events for URM community building (staff, faculty, students, alumni).
2. *Increase staff responsibilities/support for key school diversity events.*

### Rationale

1. *Our current URM students are experiencing the effects of severe underrepresentation (among student body, staff, and faculty). They are also key in our approach to recruiting and yielding prospective URM students, are active in offering co-curricular activities, and add to the learning of their peers in the classroom. Therefore, there is added burden of distribution of voluntary work among few students.*

### Financial Impact

Funding for diversity initiatives developed by affinity groups or student-led initiatives with a focus on community climate or academic endeavors supporting equity-fluent leadership (\$25,000), financial support for diversity-related case competitions (\$20,000) and funding for quarterly events for community (staff, faculty, students, alumni) (\$20,000) would need to be added to the Director of Inclusion and Diversity budget.

### Next Steps

- Request fiscal approval and lead implementation – November 2018 (Bautista)
- Get input from Student Affairs officers on quarterly community events and allocation of funds for affinity groups and diversity-related case competitions – November 2018 (Bautista)

## **Action #9: Evolving Staff Hiring Policies/Practices – Equity-Fluent Staff**

This action focuses on evolving our staff hiring policies and practices to increase our expertise and understanding of the needs of communities that have been historically underrepresented in business, and how to best address these needs.

### Background

One of the objectives in our school's strategic plan is to increase staff and faculty diversity because having a more diverse staff and faculty are intrinsically connected to the student experience and necessary to yield underrepresented students. We have identified needs for internal diversity expertise within student-facing teams, and teams that interface with prospective students.

### Proposed Actions

1. *Include explicit language in job postings to address diversity needs within teams. As staff positions open, hiring managers will implement job description language that includes expertise, experience, or demonstrated understanding of the needs of communities historically underrepresented in business, and how to best address these needs.*
2. *Staff Personnel Committee reviews staff diversity metrics twice per year and places parameters on hiring managers to include more diverse candidates in the pool and interview panels.*
3. *Interview process must include a question related to diversity and inclusion.*

### Rationale

1. *Increasing staff expertise in understanding the unique needs of historically underrepresented communities is critical to best serving our existing students, increasing yield of students from underrepresented backgrounds, and creating an inclusive environment that will positively impact the student experience.*
2. *Increase in staff expertise and representation will increase staff engagement overall and particularly among staff from historically underrepresented communities.*

### Financial Impact

Minimal impact – mainly time on the part of the hiring managers and personnel committee

### Next Steps

- Review with Senior Leadership Team (SLT) – October 2018 (Chandler and Boyd).
- Engage staff “change agents” and Dean Staff Advisory Committee (DSAC) members who are interested in being available to support the hiring process – October to November 2018 (Boyd).
- Management Team begin to ask about diversity of teams that report to them– October to November 2018 (Management Team).
- Implement processes for ensuring hiring committees are more representative and milestone check-ins to make sure pool is diverse. Add new questions about experience advancing DEI in screening applicants and during interviews – November 2018 (Boyd and Hiring Managers).
- Explore use of “Textio” to screen language of job postings – November 2018 (Boyd).

## **Diversity, Equity, and Inclusion: Actions Already Taken and Initiatives Underway Since Fall 2017**

*We want to thank students and alumni as many of these represent recommendations they have given to the Administration*

### School-wide Strategic Plan

1. Updated OGST diversity and inclusion tactic, goals, and sub-tactics (May, 2018)

### Admissions & Outreach

1. Candace Gonzales Tumey designated as URM FTMBA admissions point-person representing Haas at all MLT, Consortium, and other URM outreach activities this summer and for this coming year. (March 2018)
2. A statement of purpose regarding diversity was added to the Berkeley Haas page ([About/ Diversity](#)) and to the Full-time MBA program page ([Community/Diversity](#)) (May 2018)
3. Implemented a new question focused on socio-economic status as part of the application process across MBA programs (June 2018)
4. Revised FTMBA scholarship application process to award more scholarships at time of admission without requiring an additional application (June 2018)
5. Haas alumni donor paid MLT Membership to enable FTMBA Admissions to participate in MLT events for the next 5 years (July 2018)
6. In an effort to increase representation among the readers of FTMBA applications, we circulated the job posting (for 5 open positions) to the Alumni Diversity Council, Consortium and MLT Alumni. We were able to increase diversity in our reader group and we will continue to work towards increasing diversity among our readers (August 2018)
7. In addition to Consortium MAPS, MLT Sessions, UCLA's DMAC, Diversity Symposium, and webinars, FTMBA Admissions increased URM recruitment activities. Activities added include diversity and inclusion brunches with alumni, and "Berkeley Open Haas" which was targeted to include MLT & Forte prospective students.(June 2018 – ongoing)
8. Change in process of Consortium student applications to integrate them into existing FTMBA Berkeley Haas Interview Days. Plan to provide concurrent programming for Consortium students. (June 2018)
9. Érida Bautista conducted two-part training for FTMBA admissions committee and readers focused on unconscious bias and considerations for evaluating the new socio-economic status questions. Also delivered training for alumni volunteer interviewers on unconscious bias and provided feedback and consultation on addition of DEI interview question (September 2018).

### Student Experience/Climate

1. The Dean's Office and the Haas Alumni Diversity Council hosted a dinner to welcome Érida Bautista and continue to build community among students, alumni, and staff dedicated to improving Diversity, Equity and Inclusion. (January 2018)
2. In partnership with the Dean's Office and the Haas Alumni Diversity Council, Érida Bautista hosted a celebration to thank current students for their outstanding efforts to improve Diversity, Equity, and Inclusion at Haas. (May 2018)
3. Career Management Group (CMG) engaged Érida Bautista to partner in developing programming for the annual Employer Roundtable, focusing on increasing recruiters' skills and understanding in issues related to unconscious bias and how to better engage



with our URM students (April 2018). This will continue to be a focus for employer newsletters and the next Employer Roundtable.

4. CMG pursued referrals to a start-up advisor at Kapor Center and suggestions of where to post staff roles to attract underrepresented minority candidates (April 2018)
5. Approved recommendation to incorporate questions on Diversity & Inclusion culture into the existing annual student satisfaction surveys. Ute Frey, Pete Johnson, and Érida Bautista are working with representatives from RII, GEI, and Hanover Research (survey administrator) to finalize items for next survey (June – October 2018).
6. The Marketing and Communications team, in consultation with Érida Bautista, institutionalized celebrating and highlighting Heritage Months and holidays through social media and articles starting with Latinx-heritage month stories (September 2018)
7. The Dean's Office produced an event with the Berkeley Interactive Theater. The interactive workshop for staff, faculty, and students focuses on skills to engage in dialogue across differences. (October 2018)

#### Curriculum/Courses

1. Across all MBA programs and PhD program, new student orientations included unconscious bias training and an emphasis on diversity and community norms focused on engaging in respectful discourse across differences (May – August 2018)
2. Dean increased Director of Inclusion and Diversity budget to include funding for diversity-focused student dialogues: (a) Dialogues on Race dinners (b) RII/Consortium lunch dialogues (June 2018)
3. Intentional integration of guests from historically underrepresented backgrounds in the Dean's Speaker Series (July 2018)
4. Financial support for RII student retreat. Provided facilitator from Courageous Conversations on Race for the retreat. (August 2018)

#### Staff, Faculty & Centers/Institutes

1. Kellie McElhane launched the Center for Equity, Gender & Leadership at Berkeley-Haas (November 2017)
2. Increased Director of Diversity from part-time (50%) to full-time and expanded the title to Director of Inclusion and Diversity, with a focus on Student Climate. Érida Bautista was hired into this new position in January 2018. (April 2017)
3. Race-focused diversity and inclusion retreat for admissions and student affairs representatives from each Haas degree-granting program plus CMG rep (July 2018)
4. Dean's office launched unconscious bias training for all Haas staff, led by Érida Bautista and Don Moore. 115 Haas staff watched the video and 72 staff participated in the live session, representing approximately 50% of Haas staff (August 2018)
5. Erica Peng (CMG career coach, professional faculty) offered three skill-building workshops to CMG colleagues based on her class "Interpersonal Skills and Embodied Leadership" to increase engagement and collaboration within the CMG team, as well as enable staff to better engage with and support a diverse student community with wide-ranging needs and capacities (July/August 2018).
6. Sessions led by Érida Bautista for both Ladder and Professional faculty: 1) New Faculty Orientation Creating Inclusive Classrooms (August, 2018); 2) Professional Faculty Breakfast: HEALS – an approach to addressing difficult conversations in the classroom (September, 2018)
7. Haas Personnel Committee approved two new positions – Chief Diversity, Equity, and Inclusion Officer and Director of Diversity Admissions. (October 2018)

#### Development & Alumni Relations (DAR)

1. Haas officially sponsored the Diversity Career & Networking Fair, hosted by the Chicana/Latina Alumni Association and the Black Alumni Association. Several staff were involved in the programming in support of undergraduate students and alumni (October 2018).
2. Haas exploring partnership with University Development & Alumni Relations (UDAR) Student Experience & Diversity team to align with University's African American Student Initiative (July, 2018 – ongoing).
3. Haas committed to participate in Cal Alumni Association 2019 Diversity Symposium (July 2018 – ongoing)
4. Érida Bautista partnering with DAR to participate in 4 local alumni chapters meetings or events, focused on diversity and inclusion (2018-19)
5. Ongoing administrative and financial support for HADC meetings and events.

## 5 Year Plan: D&I Advantage Tactic Diversity & Inclusion Advantage

Strengthen the sense of belonging and inclusion at Haas among students, faculty, and staff from underrepresented and historically marginalized communities. Increase enrollment of all underrepresented groups, while equipping all students and Haas leadership to be equity-fluent.

### Goal 1 - Representation/Yield:

Increase outreach to URM in applicant pools for each degree program

Data points include:

1. # of URM (separated by race/ethnicity to address nuances in trends for each groups), women, LGBTQ, veteran, and differently abled: applicants, admission offers, and yield

**Strategy 1 - Outreach:** expand networks and approaches to attract qualified prospective students from diverse backgrounds.

- **1.1 Data and Analysis:** conduct annual analyses (Report Card) of application pools for all Haas degree programs, to address gaps in recruitment and yield.
- **1.2 Link to Berkeley Leadership:** increase Dean's external communications and web presence that connect Diversity, Equity and Inclusion, Haas culture and leadership brand.
- **1.3 Alumni Network Strength:** engage alumni from historically underrepresented groups, partner with the Haas Alumni Diversity Council, and engage them in outreach process and in organizational change.
- **1.4 Diversity of Staff and Faculty:** recognizing that an increased presence of diverse staff and faculty signals a larger commitment to diversity. Set an expectation that a successful search means there is a diversity in finalist pools.

**Strategy 2 - Access:** diverse representation is key to equipping students to lead in a diverse world. Increase yield of historically underrepresented students by decreasing enrollment barriers.

- **2.1 Admissions:** ensure fair and equitable consideration for all applicants in line with legal constrictions (e.g. Prop 209) and socioeconomic variables.
- **2.2 Funding:** secure funds for need-based funding to increase yield for students and increase capacity for Consortium Fellowships.

### Goal 2 - Student experience

Enhance educational experience to ensure all students have opportunities to deepen understanding of multicultural dynamics to strengthen leadership skills.

Output metrics:

1. % of students who report feeling confident in their ability to lead diverse teams
2. % of students who report feeling equipped to have respectful dialogues across differences with their peers
3. # of students who participate in coursework or co-curricular activities where students deepen understanding of multicultural dynamics
4. % of student reporting feeling respected/included (student satisfaction survey)

**Strategy 3 - Academics:** integrate a broader, more diverse mix of perspectives into all aspects of the student experience.

- **3.1 Curriculum - Broaden Perspectives:** infuse a broader representation of diverse backgrounds and perspectives in the classroom experience (via cases, guest speakers, supporting participation from all students). Identify and support curricular and co-curricular offerings supporting the development of Berkeley equity-fluent leaders.
- **3.2 Classroom Strategies:** provide ongoing opportunities for faculty to engage in practices focused on creating inclusive classrooms, engaging URM, women, veterans, students who are differently abled, and LGBTQ students in GSI and board leadership opportunities.

**Strategy 4 - Culture & Community:** better integrate DEI into school's culture and leadership and demonstrate Defining Leadership Principles in becoming more equity-fluent.

- **4.1 Strengthen Leadership DEI Capacity:** School's leadership to actively engage in ongoing trainings and demonstrates being more equity-fluent in its actions.
- **4.2 Strengthen Culture of Inclusion:** annual student satisfaction survey to assess climate and DEI skill building opportunities; use this data to build on existing efforts to create a more inclusive environment across Haas.
- **4.3 Information Sharing & Internal Communication:** build greater awareness and increase collaboration of diversity and inclusion efforts across the school.