

# University of North Carolina Study on Equal Opportunity, Diversity and Inclusion

**Meeting of the Subcommittee on EO,  
Diversity, and Inclusion**

**April 3, 2018**

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# Background & Context

## Establishing Common Definitions

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The following working definitions were developed in consultation with GA and the UNC constituent institutions based on the scope of the study and actual observed EO and D&I practices across the system.

- **Equal Opportunity (EO)** is defined as the ability for stakeholders including faculty, staff, students and applicants to be considered for admission to, employment by and promotion on the basis of merit, and without unlawful discrimination on the basis of Federal protected classes as well as UNC constituent institution protected classes.
- **Diversity and Inclusion (D&I)** is defined as the environment of safety, support, tolerance, and respect that stakeholders face as they pursue their ambitions and interests, regardless of their race, color, religion, sex, sexual orientation, gender identity, national origin, age, disability, veteran status, or other personal characteristics or ideologies.

# Feasibility of Consolidation

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**Consolidation of EO and D&I services within a single office** headed by a single officer is **only feasible if roles that are entirely dedicated to EO and D&I are included within scope.**

However, this approach is **unlikely to create cost savings in the near term** and is **not recommended** due to:

- The risk that D&I becomes a sub-function of EO;
- The need for specialized skillsets in some EO and D&I-related roles;
- The challenge of recruiting or developing leaders with expertise in both EO and D&I functions;
- The high likelihood of negative reactions from stakeholders; and
- The optics of taking an action to consolidate EO and D&I functions.

# Defining a senior-level EO and D&I Coordinator

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Consolidation is likely to **create unnecessary disruption and risk with limited potential for near-term increases in efficiency and effectiveness.**

As a more practical alternative to increase efficiency, effectiveness and transparency, consider **defining a senior-level EO and D&I Coordinator role** (as additional responsibility, not headcount) at each constituent institution to:

- oversee the definition of a singular EO and D&I strategy and set of D&I performance measures;
- increase coordination between EO and D&I activities at each institution;
- identify opportunities to streamline processes and reduce any potential duplication; and
- serve as a single point of accountability and contact for the institution on EO and D&I matters.

# Recommendations to improve efficiency, effectiveness, and transparency

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- **Have System Office provide greater guidance and support to constituent institutions**
    - EO and D&I definition
    - program and policy development, content and implementation
    - process and communications frameworks
    - consistent tools and technology
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- Limited collaboration and communication between constituent institutions within the UNC system in terms of sharing EO and D&I best practices, policies, and approaches
  - Legal Affairs within UNC System Office employs a Title IX subject matter expert and has recently hired a shared service Title IX investigator

# Recommendations to improve efficiency, effectiveness, and transparency

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- **Create standard EO and D&I policies** (and programs, where efficient)
    - Keep at the system level so that each institution can leverage and adapt if required
    - Limit adaptation to what is legally, regionally or institutionally required
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- Some common policies require constituent institutions to create their own; most do not
  - 198 EO and D&I-related policies (including EO or D&I policy statements) and 527 EO and D&I-related programs (non-personnel costs) were reported by constituent institutions system wide
  - Many policies across constituent institutions are similar in language and scope
  - Many policies are developed at the State of North Carolina level

# Recommendations to improve efficiency, effectiveness, and transparency

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- **Utilize the soon to be launched system-wide employee engagement survey**
    - Systemic measurement of EO and D&I progress across the institutions
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- Constituent institutions have implemented many activities, events, websites, communications, and other forums to increase transparency of EO and/or D&I policies and programs
  - Most agree they could benefit from increased transparency of how well the system is doing holistically as well as institutionally in these areas

# Recommendations to improve efficiency, effectiveness, and transparency

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- **Create a centralized webpage for the UNC system**
    - Where and who to go to for what
    - Links to webpages for each institution to outline the structure of EO and D&I points of contact, offices, programs, and policies
    - Links to institution-specific web pages for more insight and information
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- Regardless of how the organization is structured, most constituent institutions do not have a single point of reference (i.e., document or website) where stakeholders can go to find out who to contact based on their need or concern

# Recommendations to improve efficiency, effectiveness, and transparency

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- **Have all UNC system institutions explicitly address EO and D&I in their strategic plans**
  - Many institutions already do this
  - Include specific objectives, success measures and timelines for their achievement
- Some constituent institutions have specific goals in their strategic plans related to EO and D&I and some constituent institutions conduct climate surveys or stakeholder engagement surveys that include questions about diversity and inclusion
- Most constituent institutions (with the exception of required EO reporting) have not defined specific performance measures and metrics to assess the efficiency or effectiveness of their EO and D&I programs, initiatives, and efforts

# Recommendations to improve efficiency, effectiveness, and transparency

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- **Implement a single data system for EO and D&I-related case intake and tracking across all institutions**
    - Increase consistency for reporting
    - Standardized channels for case intake creates additional fairness and equity across the system regarding accessibility of EO and D&I resources and opportunities to report issues
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- Not all constituent institutions use an online tool to gather, process and track EO or D&I activities and/or issues and those that do use differing tools/technology

# Recommendations to improve efficiency, effectiveness, and transparency

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- **Expand the shared “service center” of EO and D&I subject matter experts**
    - Small constituent institutions benefit most, with fewer EO and D&I resources to leverage
  - Particularly at those small constituent institutions, most EO and D&I roles are not fully dedicated to those activities; instead, these activities represent only a percentage of each role’s job duties
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- Most programs and training are managed and conducted at the institution-level; however, UNC System Office just completed the development of online search committee training to be shared with all of the constituent institutions

