Introduction

Changes in leadership have occurred during this reporting period – the Senior Vice President for Finance & Business and the chief diversity officer (the Fostering Diversity Key Initiative Manager). However, neither change diminished the resolve and commitment to see stability and improvement in the areas we identified in our initial or mid-term progress reports. Al Horvath replaced Gary Schultz as the Senior Vice President (Sr. VP) in July 2009 and he quickly made his intentions clear that our Fostering Diversity Key Initiative (KI) would remain at the forefront of his agenda. Lydia Abdullah became the Key Initiative Manager after the retirement of Tom Gibson in June 2006. Lydia had been a member of the Finance & Business (F&B) diversity team since its inception in the mid 90’s and had served as F&B’s liaison to the Equal Opportunity Planning Committee since 1989. Her history of the F&B organization and Al Horvath’s wealth of experiences/perspectives from other universities, were a good match to continue F&B’s vision for diversity.

Some changes had to be made to our original Action Items based on refinements of needs or the expected outcomes. There have been enough paradigm shifts in society and the University during the span of these few years to cause such revisions – from the recognition of generational differences to the restricted financial (and human) resources that were available for new or existing efforts. However, these limitations have not caused us to abandon our plans, simply to defer some of them. Our initial report:

And as we learned more about the diversity climate through our survey results and interactions with F&B employees, we also adjusted our priorities. Most telling has been the emergence of two negative themes: mistrust of leadership and the fear of retaliation from peers and supervisors if sensitive issues were discussed. These are critical areas in need of improvement and that transcend “diversity” as they are climate issues that have been revealed when discussing the workplace in general. Al Horvath has made this a key area to be resolved with his F&B Leadership team in 2010 and beyond.

We endeavored over these years to involve F&B employees in the creative and implementation processes. Although there is a formal Key Initiative Team charged with developing and assessing our diversity efforts, the Sr. VP holds all of his Leadership Team (his direct reports) responsible for implementing the Action Items and sustaining successes. He is diligent about making this the responsibility of all within F&B. As such, information is accessible and transparent throughout the organization – using staff meetings/retreats, websites, newsletters and small group meetings to communicate and obtain feedback. This has broadened the buy-in for the Framework but at the same time, has exposed our efforts to documented “backlash” (mostly in open-ended survey responses). This has caused some additional work to ensure that no one
feels disenfranchised and that all employees within F&B can be included in what we do for diversity.

Presented below are the Action Items and their status reports since the 2006 Mid-Term Progress Report for Finance & Business.
http://www.equity.psu.edu/Framework/updates_04_09/pdf/academic_midpt/progress_reports/f&b_pr.pdf

**Challenge 1: Developing a Shared and Inclusive Understanding of Diversity**

**Action #1**
Finance and Business will refine its definition of diversity with the emphasis on the importance of diversifying the workforce and providing an inclusive, welcoming environment.

At the recommendation of our KI Team, our definition has been broadened since our 2006 Update to include gender identity/expression:

*F&B defines diversity as the acceptance and understanding that everyone is unique. People from different backgrounds and experiences contribute to the richness and the competitive edge of the University. We recognize these differences and strive to promote a respectful and inclusive environment that fosters innovative, flexible approaches to work and helps all employees and the organization achieve their full potential. Differences may include, but are not limited to: race, ethnicity, culture, gender, gender identity/expression, sexual orientation, socioeconomic status, mental abilities, age, physical abilities, religious beliefs, political beliefs, work experiences, education, geographic location, marital status, military experience, and parental status.*

This revised definition appears in electronic and printed materials, where appropriate and has been posted to the F&B website: [http://www.fandb.psu.edu/diversity/default.shtml](http://www.fandb.psu.edu/diversity/default.shtml)

**Action #2**
University-wide and Finance & Business specific diversity initiatives will be communicated in a clear and consistent manner to all staff. This will be accomplished through the Finance & Business website, regular staff meetings, the Finance & Business Newsletter, incorporated into the annual spring retreat agenda and Finance & Business unit head meetings.

The content and timeliness of the F&B Diversity website have been upgraded and it is in compliance with the University’s website guidelines. Content has been refined to clearly indicate which programs/resources are unique to F&B and which are university-wide. The Framework to Foster Diversity reports are readily available at this site as well as the F&B Diversity Climate Survey results. [http://www.fandb.psu.edu/fbdiversity/](http://www.fandb.psu.edu/fbdiversity/)

The F&B Newsletter is available in hard copy and on-line. A special edition featured the 2008-13 Strategic Plan and other issues regularly highlight the Key Initiatives.
Effective July 1, 2009, the KI Managers were added to the organizational chart of the Sr. VP and report directly to him for overseeing the Strategic Plan. With this comes attendance at bi-monthly F&B Leadership (the Sr. VP’s direct reports) meetings and retreats. Additionally, they are now required to make quarterly reports on the status of the KI action items instead of annually. For the Fostering Diversity KI Manager, this includes a status update on the Framework to Foster Diversity. Electronic minutes of these meetings are filtered throughout the organization and select information/presentations are featured on the F&B website and newsletter.

The Sr. VP now requires ownership by the entire Leadership Team for KI issues that are discussed as opposed to only the KI Manager and Team members being held responsible. Resolution and follow-up reports of actions taken are expected and documented for review. An example of a major issue employees noted in the results of recent surveys was that they feared retaliation on the job if they addressed acts of intolerance. This has been discussed at subsequent meetings and retreats and educational programs are being planned for F&B.

Starting in 2008, the Fostering KI meetings were scheduled on a monthly basis to ensure the continuity of the work and to bring about more timely results. KI Team members are charged with sharing information at the meetings and within their units for consistent and timely actions on the Framework and Strategic Plan goals.

The main F&B website now includes a “Headlines & Updates” column that is used to convey timely features. This provides a means for diversity related events to be shared throughout the organization on a regular basis. [http://www.fandb.psu.edu/](http://www.fandb.psu.edu/)

Posters were developed for all F&B Key Initiatives in 2009 and companion brochures are also being produced. This PR effort is to enhance the consistency of our message and to provide a visual reminder of what F&B values in the workplace. The brochure for Fostering Diversity was the first to be completed and have been distributed throughout the administrative units. They will be included on the diversity website and also used for recruiting/marketing activities. Refer to [Appendix 1](#) for the text and photos of the Fostering Diversity brochure.

**Action #3**

Administer a survey every 3 years to assess progress on diversity/climate issues. The survey will assess the understanding and commitment to diversity and identify opportunities for improvements. Results will be communicated to all staff through the diversity website, all unit newsletters, Finance & Business Staff meetings and unit staff meetings.

A Diversity Climate Survey was conducted in F&B in 2007 (the third since 1995), using an independent, outside contractor to collect and compile the results. Comparable
questions from the two previous diversity climate surveys were used to assess progress. Respondents were asked the following demographic information so that the results could be disaggregated: work unit, gender, race, employment classification, sexual orientation, age, years of service, disability, and education level.

A report of the Diversity Climate Survey was prepared for all of F&B, in summary, as well as separate reports for each administrative unit. This included any verbiage from open-ended comments. This wealth of disaggregated data provided an opportunity to not only identify positive and negative trends, but to also pinpoint issues that may be unique to some work units. Refer to Appendix 2 for highlights of the survey results.

The Diversity Climate Survey results were analyzed by the KI Team and extensively reviewed/discussed with the Sr. VP, F&B Leadership, and the various Diversity Focus Groups. Additionally, the Administrative Unit Heads (AUHs) were charged with discussing the survey results in their organizations. For a broader more complete dissemination of information throughout F&B; results were highlighted through the newsletter and website. Refer to the following websites:
http://www.fandb.psu.edu/fbdiversity/survey/

During 2008, the KI Team requested a status update report from all AUHs that dealt with how they shared the Diversity Climate Survey reports in their units and their plans to address any negative issues. Best practices were extracted and areas for continued progress were identified. Refer to Appendix 3 for highlights of the summary report prepared from this initial follow-up. Additional status reports will be required in the next reporting period to track our progress. Some of the remaining disaggregated data has not yet been thoroughly analyzed (years of service, age, employment classification, disabled) – this will be done in 2010 by the KI Team.

The F&B results for the 2008 Faculty/Staff Survey have been posted prominently on the F&B website to initiate discussion and accountability throughout the organization. Additionally, the results were highlighted by the Sr. VP at the first gathering of all F&B employees in November 2009. The diversity related results of the 2008 Faculty/Staff Survey were reviewed and discussed with F&B Leadership at several meetings. Diversity related themes were identified and highlighted in leadership discussions. A special presentation of the results will be presented to the KI Team in early 2010 by the Associate VP for Human Resources.

The 2008 Faculty/Staff Survey results indicate that F&B ranks more favorably than the rest of the university on issues regarding diversity. These results will be used to identify best practices and “pockets” of problems in the organization. Refer to following website for the F&B results and slides #11 and #12 specifically for the diversity related questions and responses: http://www.fandb.psu.edu/survey08.shtml

Because of the wealth of information gleaned from the 2007 F&B Diversity Climate Survey and the 2008 Faculty/Staff Survey, F&B will not conduct another climate
survey in 2010. A decision as to when the next survey will occur will be made at a later time. We do not want the workforce to weary of being surveyed. Administrative Unit Heads provided a status update to the SR. VP on all issues identified in the 2008 Faculty/Staff Survey as well as their plan to improve negative findings. Periodic updates will be requested over the next few years. The KI Team will continue to analyze and compare disaggregated data from the 2007 F&B Diversity Climate Survey and the 2008 Faculty/Staff Survey.

**Action #4**
Actively support *The Penn State Principles* and the University’s nondiscrimination policy.

The new 2008-13 Strategic Plan and the 2010-15 Framework to Foster Diversity Plan for F&B take into account both of these items. The Principles are posted in F&B administrative offices and are still prominent on the F&B website header: [http://www.fandb.psu.edu/](http://www.fandb.psu.edu/)

F&B Leadership chose to retain a nondiscrimination statement on external communication when university administration was given an option not to in 2009. It states, “Penn State is committed to affirmative action, equal opportunity and the diversity of its workforce.” This will appear on all external communications.

F&B Leadership Commitment Statement on Diversity was renewed by F&B leadership after the retirement of Gary Schultz and the appointment of Al Horvath in July 2009. [http://www.fandb.psu.edu/images/DiversityLetter.jpg](http://www.fandb.psu.edu/images/DiversityLetter.jpg)

New internal purchasing/contract guidelines are being developed to promote and sustain Minority Business Enterprise/Women Business Enterprise (MBE/WBE) inclusion to promote and ensure that OPP and Procurement Services adhere to non-discrimination in their activities. Internal personnel (project managers, purchasing agents) will be trained on these guidelines during 2010 and accountability processes will be put in place to ensure their use.

**Challenge 2: Creating a Welcoming Campus Climate**

**Action #1**
Continue annual Diversity Focus Group meetings with diverse staff in F&B and the Senior Vice President for Finance & Business.

The KI Manager and Sr. VP continued to meet, at least annually, with the established F&B Diversity Focus Groups: People of Color, Women, and Lesbian/Gay/Bisexual/Transgender (LGBT). The Strategic Plan and Framework goals and action items were discussed as well as any current climate issues. Highlights of these meetings are shared with the KI Team and F&B Leadership team to determine if any follow-up is warranted. Often the conversation was positive or boiled down to general “people” issues. Refer to [Appendix 4](#) for some items that have been addressed over the
past 3 years. A fear of repercussions if employees report acts of intolerance still continues to be a theme that is heard in the group discussions.

The Diversity Focus Groups are comprised of employees from all F&B units, where possible. AUHs are asked to recommend staff members to participate and we have rotated some participants off of the more established groups so that we might get fresh perspectives. The new Special Assistant to the Sr. VP also attends these meetings now as well.

As a result of survey responses, two new Focus Groups have been formed since 2006 – Disabled Employees and White Males. Since we have to rely on self-identification of disabled employees, it has taken some time to gather a sufficient number to form their focus group. As such, that focus group will meet for the first time in early 2010. The White Males Focus Group was formed to address the “backlash” comments documented in the various survey responses. Participants include those that are disgruntled as well as those that have championed diversity. Homosexual males have also been included. They have met with the Sr. VP and KI Manager to discuss the survey responses and to explore their role as affinity partners in our diversity endeavors. Additionally, they were invited to a private luncheon with John Amaechi to gain greater insight about the need for diversity action. We have already seen and heard a change in some of their perspectives as a result of these few meetings.

The KI Team has received requests to establish a focus group to address issues on religion. Our open-end survey responses indicate that there are some F&B employees that feel as though they are discriminated against because of their religious belief. Because there is no method to identify employees by their religious preference, seeking participants for such a focus group will require a greater effort by the KI Team.

In past years, the People of Color Focus Group was the least satisfied group among the Focus Groups. A major concern was the relatively flat growth in their numbers and the inability to be represented when there were acts of intolerance in the workplace. To further articulate their concerns, the Focus Group prepared a report to the then Sr. VP, Gary Schultz, and made recommendations for improving the climate within F&B. The most significant recommendation was for increased “infrastructure” in the form of a position reporting directly to the Sr. VP for diversity in F&B. Upon his appointment as Special Assistant to the Sr. VP in 2007, Al Horvath took this on recommendation and agreed to find a resolution. Refer to Action #4 in Challenge 7 for further details.

In February 2009, the Sr. VP and KI Manager invited all fulltime employees of color in F&B to a reception to discuss their experiences at the university and in the community. Out of 74 fulltime employees of color, 57 attended the reception. We were particularly interested in hearing why they came to the University and why continue to stay so that we can document best practices for all of F&B. For the most part, the input was positive and constructive. Consideration will be given to a follow-up meeting that will include F&B Leadership.
**Action #2**
Utilize the Office of Physical Plant’s statement on intolerance and process for dealing with intolerance across Finance & Business.

F&B Leadership activated a statement on Acts of Intolerance and a Commitment Statement on Diversity in 2006. On July 1, 2009, Al Horvath became the new Sr. VP for F&B and has renewed support for these critical support documents. Some units have added the signatures of their unit leadership teams to the Commitment Statement on Diversity (i.e. Office of the Corporate Controller). Refer to: [http://www.fandb.psu.edu/news/FBIntolerancePolic(final).shtml](http://www.fandb.psu.edu/news/FBIntolerancePolic(final).shtml) [http://www.fandb.psu.edu/fbdiversity/images/DiversityLetter.jpg](http://www.fandb.psu.edu/fbdiversity/images/DiversityLetter.jpg)

**Action #3**
Specifically address the uncomfortable climate for LGBT employees in Finance & Business. The Senior Vice President will meet annually with a group of LGBT employees similar to the women and underrepresented minority employee annual meetings. Using information gathered in these meetings as well as results from the various climate and satisfaction surveys, Finance and Business will determine appropriate training and other activities to improve the environment within Finance & Business for LGBT employees.

The KI Manager and the Sr. VP continue to meet with the LGBT Focus Group to discuss concerns and best practices. We continue to seek ways to increase the number of members in this focus group but we have to rely on self identification and word-of-mouth. The size of the group has doubled since the initial membership of 4 in 2004.

Results of the 2007 Diversity Climate Survey were summarized and discussed with this Focus Group. F&B employees were able to identify their sexual orientation when taking the survey, so the responses could be summarized accordingly. 86.6% of the respondents indicated that they were “heterosexual”; 6% as “not heterosexual” and 7.4% as “no response.”

As in past surveys, respondents reported that they felt the climate was least comfortable for LGBT employees. However, when this particular issue was discussed with the LGBT Focus Group participants, they expressed how the climate in F&B has been welcoming and nurturing for them personally. The question now becomes if the general population perceives that the climate is worse than what the affected population actually has experienced. The LGBT Focus Group will work with the KI Team to gain further insight into this disparity.

Education is a critical component for improving the climate. The KI Team previewed and subsequently purchased the video “No Dumb Questions” in 2007 – a documentary about 3 young sisters embracing their transgendered aunt. The video was shown to the F&B leadership team with recommendations that they use it in their units for professional development with facilitated discussions. Several units have since used the video at staff meetings/retreats.
In March 2009, Penn State alum, John Amaechi met with several hundred F&B employees over a 2-day period to discuss his experiences as a homosexual, Black male – as student, basketball player, parent and businessman. He also met with F&B Leadership in an informal, social session. His presentations were met with overwhelmingly positive responses – largely because of his style and personal stories of positive interactions with F&B employees while he was a student. This helped pave the way for follow-up dialog within the units.

**Action #4**
Mitigate the perception that gender/race plays a larger role in the selection process than qualifications.

Although we had planned to include this as a topical question in the 2007 Diversity Climate Survey, we chose to discuss it at the Focus Group level to gain further insight as to what was causing this misperception.

When presented with the actual numbers, it was clear that this was not an accurate portrayal since the number of gender/race new hires had not increased significantly over the decade. What we did glean from our discussions was that the more we publicized and promoted our diversity recruitment and retention efforts, the more this belief became prevalent in the workforce. A part of the resolution will be to more clearly articulate our hiring policies so that employees have the assurance that only qualified applicants are considered and hired for F&B positions. Human Resources Representatives and F&B Leadership can reinforce this in their units. Additionally, we will continue to make public the actual make-up of the F&B workforce by gender and race. Currently, a profile of the F&B workforce appears on the F&B website. The data is also readily available on the university’s Fact Book. Refer to Appendix 5 for a profile of the F&B workforce by gender and race.

**Action #5**
Continue to fund mandatory diversity training for all new hires. Provide professional development opportunities in diversity for all Finance & Business staff.

The F&B New Employee Orientation remains as a requirement for all new fulltime employees to F&B and is funded by the Sr. VP. Based on feedback from focus groups, participants and the KI Team, the module on diversity was revised in 2006. The current module, “Promoting Inclusion & Respect in the Workplace,” is reviewed each year to assess its relevancy and message consistency. We have received some feedback from participants that they feel the information duplicates what is covered in the university’s New Employee Orientation; however F&B Leadership believes that the contents complement that program and are significant enough to continue to be presented in this module to reinforce F&B core values and beliefs.

During March 2009, F&B partnered with other units to sponsor PSU alum John Amaechi, who shared his perspectives on diversity, respect and civility as a Black, homosexual male. Amaechi addressed over 1000 (mostly technical service) employees over 2 days in
small group sessions. This provided a quality diversity activity to a larger mass of F&B employees and will be used as a model for future training/awareness events. See the following Penn State Newswire story of his visit and it impact on employees: http://live.psu.edu/story/38641

F&B central funding was provided for the following free professional development opportunities for all F&B employees: Mark Taylor in November 2007 (generational differences) and John Amaechi in March 2009 (race and LGBT issues). Additionally, the video presentation on transgender, “No Dumb Questions,” was purchased in July 2007 for use by all of F&B staff. A subcommittee on diversity education has been established on the KI Team to help identify appropriated professional development venues and resources.

**Action #6**
Track staff development hours by unit. Establish standards and minimum hours per year devoted to diversity/climate issues for each employee.

The KI Team’s subcommittee on diversity education is currently collecting information on how diversity-related professional development hours are being reported in each unit and will determine how best to set standards for all of F&B. We are learning that each administrative unit is so unique that it is often best to leave the methods of collecting and reporting data up to the units and provide guidelines for consistent and timely reporting to the Sr. VP.

An electronic “dashboard” to provide a quick summary of key measurements of F&B administrative units is being developed for the Sr. VP. The KI Team has proposed that professional development hours (including diversity related activities) be included in this accountability tool. It is scheduled for completion in 2010.

**Challenge 3: Recruiting and Retaining a Diverse Student Body**

**Action #1**
Provide diversity/climate training opportunities for all student employees.

As of Fall 2009, F&B had 416 student employees. Police Services and Hospitality Services, who hire the bulk of F&B part-time student employees, provide mandatory diversity training. The KI Team will assist in developing standards for diversity training for all student employees within F&B during the next Framework reporting period.

**Action #2**
Collect statistical information on student employees working within Finance & Business including race/gender and other demographics.

At the conclusion of this reporting period, most part-time employees (which would include students) still enter the University’s database via a Wage Appointment Form.
This form does not require that this demographic information be collected. Therefore, gender and ethnicity information cannot be readily obtained.

Since the university is not planning to replace the current data collection method for all part-time employees, F&B will have to work through the F&B Human Resource Representatives to develop a means to collect and report this information. We have not completed this action item during this reporting period due to other priorities.

**Action #3**
Assess student employee level of satisfaction with their work environment and relationships and the impact of their working experience on their college career.

Only full-time employees participated in our 2007 Diversity Climate Survey. A separate assessment was not developed for part-time employees. As university systems are developed to include part-time employees in a database, F&B will use it to identify and communicate with part-time, student employees.

As with full-time employees within F&B, part-time employees have access to their supervisors and any F&B HR Representative if they are experiencing problems in the workplace.

**Challenge 4: Recruiting and Retaining a Diverse Workforce**

**Action #1**
Continue to sponsor and fund the Diversity Internship Program within Finance & Business. Move the management of this program from the Diversity Key Initiative Team to the Office of Human Resources establishing the diversity internship as an institutional program of the University.

Since 1992, the F&B Diversity Internship Program has successfully employed 16 people of color who were Penn State students or recent graduates. Originally, we thought our recruitment would be students from historically underrepresented colleges. However, we realized that there were a number of Penn State students/graduates that were interested in remaining in the area and would qualify for this program. Accordingly, all participants have been from Penn State. As long as there are viable candidates among Penn State students, they will be our primary source for participants in this program. Program information: [http://www.fandb.psu.edu/fbdiversity/internprogram.shtml](http://www.fandb.psu.edu/fbdiversity/internprogram.shtml)

During 2009, revisions were made to the F&B Diversity Internship Program after a planning session with F&B Leadership to increase the retention of these employees after their internship period. The revised component of the program is the “New Professional Internship” which recruits a cohort of 3–4 recent Penn State graduates into a more highly structured program that includes organized professional development activities and rotation throughout various departments in F&B. The basic benefit package remained the
same. We expect this method to increase our retention interns that transition to employees. Refer to Appendix 6 for a history of the retention of interns as fulltime employees.

Although the operational end of the program now resides in the Office of Human Resources (OHR), Auxiliary & Business Services has taken the lead in “hosting” the participants of the New Professional Internship program. Funding is still in place to support as many interns as we can logistically handle with limited housing accommodations and willing F&B “host” units.

**Action #2**
Support the Dual Career Employment Assistance. Finding employment for a “trailing” spouse/partner is an important factor in providing a welcoming environment for new employees. Utilize current assessment tools to measure the success rate of this initiative within Finance & Business.

This OHR program supports the entire University. From January 2003 to November 2006, F&B had hired 12 spouses/partners. Since the 2006 Mid-Term Progress Report, 96 spouses/partners have been hired by the University out of the 315 seeking assistance. F&B has hired 3 of these individuals during this time period. Given the university’s hiring constraints over the past few years, we are satisfied with F&B participation in this program.

**Action #3**
Further promote the University’s Professional Entry Program (PEP) as a method to diversify the workforce within Finance & Business and the University.

Of the 57 participants in this program since its inception in 1985, 17 are still employed by the University (7 within F&B). There is currently one PEP intern in Physical Plant. Because of the F&B Diversity Internship Program, there has been limited use of PEP within F&B units. The Bryce Jordan Center is considering using this program to bring a diverse employee into their staff to support the Manager’s office.

**Action #4**
Require a diverse applicant pool for all management positions within Finance & Business. Utilize the resources of the University-wide Diversity Talent Bank, the Office of Human Resources diversity website, two new contracted diversity recruitment web sites (LATPRO.com, JobCircle.com) and continued attendance at diversity orientated job fairs. Create an assessment tool to track progress and accountability.

The 7 Human Resource Representatives in F&B have the responsibility of ensuring that applicant/interview pools are diverse. This responsibility will be reinforced at annual meetings with the KI Team.

Under development for the Sr. VP is an electronic “dashboard” that will provide a quick summary of key measurements for F&B. Of the diversity related measurements, the
Dashboard will include statistics on the make-up of applicant pools and interview pools for fulltime positions. This data will be by administrative unit and will allow analysis/follow-up with the applicable AUH. This will provide the consistent and timely reporting that is needed to assess our compliance with F&B goals in this area. This data is not readily available currently. The dashboard will be implemented in 2010.

OHR retains a Diversity Talent Bank and Outreach Program to ensure a connection to diverse applicants. F&B will continue to provide financial and personnel support for these programs. Steve Hayes, Assistant Manager for Diversity Recruitment, Inclusion & Special Programs, attends several career fairs each year to promote Penn State as a preferred employer and to gather resumes of diverse applicants. F&B will continue to use these sources for filling positions.

**Action #5**
Initiate and fund a mentoring program for minority new hires within Finance & Business.

F&B will continue to support the Diversity Mentoring Program that was started in 2004. As of the 2009-10 program, 33 employees of color will have been mentored by more experienced employees in F&B. Feedback from our discussions with employees of color indicated that this is critical to their retention. See Appendix 7 for a list of participants.

This is not a professional internship program and does not promote job advancement as a goal. The long-term goal is to retain people of color within F&B. The program includes a structured orientation and several social activities with the Sr. VP (Blue & White Football Game, Martin Luther King, Jr. Banquet, etc.) as well as jointly agreed upon meeting times between the mentor and mentee. Several relationships have been maintained after the formal program period has ended. Refer to the following for program details:

http://www.fandb.psu.edu/fbdiversity/mentoring_program.shtml

**Action #6**
Participate in the Profiling Excellence: Success in Diversity magazine. This publication was recently introduced to the Diversity Key Initiative Team by the Vice Provost for Educational Equity as a means to expose Pennsylvania to the diversity talent at the University. This additional visibility may also help with attracting diverse applicants for posted vacancies.

This publication is primarily distributed in the Harrisburg area and is targeted for women and people of color in business, government and education. In 2008 we featured African Americans, Duane Bullock, Manager of Supplier Diversity, and Vernon Davis, Diversity Contractor Liaison, in the magazine to highlight our diversity procurement efforts. This was accomplished with the financial assistance of the Vice Provost for Educational Equity. That edition also happened to feature 2 other Penn State alumni.

The Sr. VP has committed to sponsoring a profile of 1-2 employees in an upcoming edition to highlight our commitment to a diverse workforce. The more visible we are in urban communities may result in more diverse applicants when vacancies are posted. We have received some feedback from our last entry in this magazine.
**Action #7**
Continue to use the Opportunity Network for Employment (ONE) program to include individuals with disabilities in the Finance & Business workforce.

The university’s participation in the ONE Program has provided opportunities for F&B to hire disabled employees in full-time and part-time positions and intends to continue using this valuable resource. [http://www.ohr.psu.edu/diversity/services/one.cfm](http://www.ohr.psu.edu/diversity/services/one.cfm)

Over the past 3 years, F&B has hired more than 40 individuals in various units (refer to Appendix 8).

**Challenge 5: Developing a Curriculum That Fosters Intercultural and International Competencies**

Finance & Business does not directly impact this challenge.

**Challenge 6: Diversifying University Leadership and Management**

**Action #1**
Create standard process/criteria to ensure that there is a diverse representation on committees, strategic teams and project groups within Finance & Business. Provide opportunities for diverse appointments to University-wide commissions, advisory committees & task forces.

At the end of this reporting period, we still do not have set criteria for such appointments or a standard process for collecting this information. However, F&B Leadership is repeatedly encouraged by the Sr. VP and Fostering Diversity KI Manager to make such appointments; especially for the Strategic Plan Key Initiative Teams and Focus Groups. There are still two women (one a person of color) out of the five F&B Strategic Plan Key Initiative Mangers.

Underrepresented employees in F&B are encouraged and released to serve on several university-wide committees. Even without an official count, we know that there are several underrepresented F&B staff members that serve on university-wide groups. Examples of committees that diverse employees are currently on (or have served) include: Middles States 5-year Review Committee, Equal Opportunity Planning Committee, IPEDS Race/Ethnicity Changes Committee, President’s Faculty & Staff Awards Selection Committee, AIS Steering Committee, Commission for Women, Commission on Racial and Ethnic Diversity, Strategic Plan Review Committee, Fostering Diversity Framework Review Team, Faculty/Staff Survey Review Focus Group, Campus Environment Team, Facilities Resource Committee, Commission for Substance Abuse Prevention.

Annually, the Sr. VP holds a Spring Retreat for over 300 employees in leadership positions within F&B. The most significant underrepresented group of employees is people of color. At these retreats, the number of employees of color has increased from less than 5 in 1995 to over 20 in 2009. This represents a broadening of what is
considered the “leadership” pool in F&B as well as people of color moving into supervisory/managerial positions throughout the organization.

Action #2
Identify inside and outside of the organization, opportunities to fill potential vacancies. For inside candidates, develop specific and tailored leadership and professional development programs to ensure that a diverse candidate pool is available when positions open.

In 2006, a new position was created, Senior Associate Vice President for F&B. This position was a critical appointment for F&B as this position was to work closely with then Sr. VP and be a viable candidate for that position upon Gary Schultz’ retirement. After a first attempt did not yield a successful candidate, an independent, national search firm was contracted to obtain the best possible pool of national candidates. Advertisements were placed with nationally diverse sources and the consultants contact base was diverse. The resultant applicant and interview pool was diverse by race and gender and although we hired a white male, we were exposed to other excellent candidates for future consideration.

The F&B Diversity Intern Program was designed to help with our recruitment efforts for employees of color. We have had limited success in retaining the interns after they were hired into full-time positions but we have recently seen a change in that paradigm. The first participant in the program eventually left Penn State after successful employment within F&B. He then went on to a fruitful career nationally and internationally. In 2009 he returned to a position within F&B (Special Assistant to the Sr. VP) where he is utilizing his career experience and his previous knowledge of F&B to fill a much needed role in the central staff of F&B. Additionally, a second participant in the program has recently returned to fulltime employment in F&B after leaving to obtain an advance degree and to work in an urban environment. We will promote these success stories throughout F&B as an example of the benefits of this diversity focused program. Currently, six participants from the Diversity Intern Program are fulltime employees of the university (refer to Appendix 6).

Given the other priorities and administrative changes during this reporting period, specific and tailored leadership/professional programs were not developed on a centralized basis. AUHs were encouraged to develop their own programs to fit the needs of their unit. Information and assessment of these programs will be done in the next reporting period and will be captured on the electronic “dashboard” being developed for the Sr. VP.

As of July 2009, the new organizational chart of the Sr. VP, contains two female Associate Vice Presidents of the ten administrative positions for F&B. With the addition of the Strategic Plan Key Initiative Managers and the newly created position of Special Assistant to the Sr. VP, there are now 2 people of color at this level in the organization. Six of the 20 direct reports to the Sr. VP are female. Refer to: http://www.fandb.psu.edu/documents/FB_Org_Chart092209.pdf
Fiscal constraints have resulted in very few vacancies, particularly at the leadership level. However here are some F&B positions filled with underrepresented candidates since December 2006:

- Special Assistant to the Senior Vice President (male of color)
- Manager of Housing & Food Services, Behrend College (male of color)
- Privacy Manager (female)
- Manager of Financial Reporting (female)
- Financial Officer, CES (female)
- Catering Manager, Behrend College (female)
- Manager of Housing & Food Services, Beaver (female)
- Human Resources Manager (female)
- Project Manager, Physical Plant (2 females)

Action #3
Continue to support the Administrative Fellows Program. Finance & Business was one of the original units that helped to create and administer this university-wide program. At its inception, it was targeted for women and people of color. The fellowship experience is designed to allow the participants to become more effective in their existing positions within the University and to provide a base for them to compete at higher levels of administration for advancement in the future.

Since 1986, F&B has provided mentoring for 17 women and release time for 11 F&B employees to serve as Fellows. Currently, an F&B female employee is a Fellow to the Vice President for Outreach. The Sr. VP is available to the Fellows even after their fellowship year. F&B will continue to participate in this program for women and people of color. Refer to Appendix 9 for a list of employees that have participated in this program.

2007-08 is the last program year that the Sr. VP served as a mentor. His Fellow was a F&B employee. As with previous F&B Fellows, she was included in F&B Leadership activities and in all but the most confidential activities of the Sr. VP. The new Sr. VP is committed to serving as a mentor in the near future.

Each year, all Administrative Fellows of the University are invited to attend at least one F&B Leadership meeting and to have individual meetings with those under the purview of the Sr. VP so that they can learn more about F&B.

Action #4
Continue to support the Leadership Centre County (LCC) Program. The LCC Program brings together a mix of existing and emerging leaders with diverse backgrounds and experiences in the county. These individuals have demonstrated the talent and desire to serve their communities. Through active participation in a succession of program days, participants become more aware of the dynamics of the social and economic changes of today and the potential impact on our communities. Each person completing the program is better informed and more skilled in active community leadership.
F&B has supported the Leadership Centre County program by providing release time and tuition for employees to participate in the 9-month program. Since LCC’s inaugural class in 1993, F&B has sponsored 67 employees -- 13 have been people of color and 42 have been women (refer to Appendix 10). Not only has this afforded the participants a professional development experience but it has also enriched the community by providing diversity to the class. Additionally, many of those that have participated are in key leadership positions within F&B. The Sr. VP will continue to support F&B participation.

In addition, F&B has committed to sponsoring the Education Program Day for three years starting with the 2009-10 program year. This will ensure the continued stability of the program that supports the development of community leaders. Refer to the following website for details of the program: http://leadershipcentrecounty.org/

**Challenge 7: Coordinating Organizational Change to Support our Diversity Goals**

**Action #1**
Review the current mission statement and strategic plan for Finance & Business to ensure there is the proper emphasis on the University objectives for diversity. Communicate to all Finance & Business staff any changes and the commitment to the plan from the Senior Vice President.

The F&B Core Values include a reference to diversity under “respect.” The Core Values were used to establish the Key Initiatives in the Strategic Plan. Refer to: http://www.fandb.psu.edu/strategicplan/framework/default.shtml#values

Fostering Diversity continued as a key initiative in the 2008-13 F&B Strategic Plan. The Sr. VP sees this as an on-going need that is not “finished” despite the progress that has been made since its inclusion in the 1991 Strategic Plan. The Framework to Foster Diversity will continue to be a primary objective in this Key Initiative: http://www.fandb.psu.edu/strategicplan/

The current Sr. VP has stressed that diversity efforts will require the active participation of more than just the KI Team and that F&B will strive to ensure that diversity is a part of the fabric of all what we do – similar to the successful efforts with environmental stewardship. See his personal comments at: http://www.fandb.psu.edu/fbdiversity/

The Fostering Diversity Key Initiative was included in the 11/24/09 Strategic Plan event, “F&B Moving Forward Together” that was held in the Bryce Jordan Center and was open to all F&B employees. Over 1200 employees attended this inaugural event. See event recap at: http://www.fandb.psu.edu/moveforward.shtml

In an effort to keep the Strategic Plan before F&B employees and other stakeholders, KI posters were developed in 2009 and companion brochures were also produced to highlight each KI. Fostering Diversity was the first brochure completed in 2009 (see
Appendix 1). These were initially distributed throughout all administrative units and will be distributed to all new F&B employees.

Annually, the Sr. VP hosts a Spring Retreat for over 300 employees in leadership positions within F&B. At these sessions, Strategic Plan updates (including Fostering Diversity) are presented and current issues are addressed. The Sr. VP and F&B Leadership respond to any questions from the participants.

**Action #2**
Strengthen the diversity representative system within Finance & Business and require that there is a representative from each unit.

The Fostering Diversity KI Team will continue to be composed of representatives from each F&B administrative unit so that consistent information is shared throughout the organization. Membership in the KI team will continue to be diverse by gender, age, race and nationality, sexual orientation, and will include members that are disabled and from various employment classifications. We will seek out a veteran to join the team in the near future. Because several of the diversity programs coordinated by the KI Team require input/support of the unit’s Human Resource Representatives, several are team members. Refer to Appendix 11 for a list of the current membership.

The KI Team now meets monthly (as of 2007) to share information and assess the progress of the Framework and Strategic Plan goals. Subcommittees meet as needed to complete projects. The Special Assistant to the Sr. VP now attends the regular monthly team meetings, subcommittee and Focus Group meetings. The Sr. VP will personally attend KI Team meetings at least once a year as well as select Diversity Focus Group meetings. KI Team members report the activities of the KI at their unit staff meetings.

The KI Manager attends bi-monthly F&B Leadership meetings with the Sr. VP and his AUHs where information is shared and issues are discussed. Quarterly, the KI Manager must provide a status report on the action items of the Framework to Foster Diversity and the Fostering Diversity Key Initiative in the F&B Strategic Plan. Time sensitive information is shared at each meeting or via direct email between meetings. This ensures that AUHs receive the same message for all of F&B in a timely and consistent manner. Although these responsibilities are not the sole or primary job duties of the current KI Manager, she is held accountable for the Strategic Plan outcomes and performance of related tasks of the KI Team. The KI Manager also facilitates the meetings and prepares any related reports for the Sr. VP.

The larger administrative units (Office of Physical Plant, Corporate Controller’s Office and the Office of Human Resources) also have internal diversity teams and those team leaders typically serve on the Fostering Diversity KI Team. They are expected to keep the KI Team informed of pertinent activities of their internal teams so that efforts are compatible with the work of the units. They also serve as a critical part of the communication efforts throughout the organization.
**Action #3**
Commitment to diversity and attainment of diversity goals becomes an integral success factor within Finance & Business. All unit heads will be evaluated on progress in diversifying the workforce and providing leadership opportunities within their units.

All AUHs have monthly “talk-times” with the Sr. VP. Progress with diversity initiatives are discussed at these meetings. AUHs will also be held accountable for reporting diversity related activity through the newly created F&B electronic “dashboard”.

The last F&B Diversity Climate Survey was completed in 2007 with extensive disaggregated results (this was the third such survey since 1995). The results were extensively reviewed with leadership, throughout the organization, and with Focus Groups. Periodic assessments will be requested of each AUH on their progress with the results. A status report was prepared with direct input from AUHs in 2008-09 (refer to Appendix 3). Best practices were extracted and areas for continued progress were identified.

The diversity related results of the 2008 Faculty/Staff Survey were reviewed and discussed with F&B Staff at several meetings. Diversity related themes were identified (see Appendix 2) and AUHs provided a status update to the Sr. VP on all issues identified in the survey as well as their plan to improve negative findings.

The Fostering Diversity KI Manager provides an annual headcount report of the current F&B workforce by gender and race to the Sr. VP and AUHs. Improvements in recruitment and retention of underrepresented groups will be assessed on a regular basis. This information is available publicly on the F&B website. See Appendix 5.

**Action #4**
The Senior Vice President reviews annually the funding requests for current and future diversity initiatives. The Diversity Key Initiative Team annually makes recommendations to the Senior Vice President on the priorities and status of all programs.

Although the KI Manager has no budgeted funds for Fostering Diversity KI activities and programs, financial requests are made directly to the Sr. VP who handles them through his central budget. Approximately, $25,000 is allocated for the KI. An additional $150,000 is set aside for the Diversity Mentoring and Internship Programs each year.

A fixed-term position was approved in 2008 to provide infrastructure for the Fostering Diversity KI; however, there was limited response after 2 internal postings. The position description will be re-worked and efforts will be made to fill an administrative/analytical support position in 2010.

Organizational infrastructure (personnel, funding, and marketing) has been provided for diversity supplier and construction initiatives for the university. Within OPP, Vernon Davis serves as the Diversity Contractor Liaison and within Procurement Service; Duane Bullock is the Manager of Supplier Diversity. Both positions are charged with bringing
more MBE/WBE partnerships to Penn State. This requires educating employees about their function and purpose as well as establishing relationships with businesses and government officials. A website has been developed for vendors for our Supplier Diversity program: http://www.purchasing.psu.edu/diversity/

**Action #5**
Continue to support the Community Diversity Group’s (CDG) efforts to provide diversity awareness training for the retail/service sector in the greater State College area.

Since its inception, F&B employees have been on the leadership team of the Community Diversity Group. The current co-chair is Carol Eicher, a member of the KI Team. They have provided diversity training to almost 50 local organizations and facilitate community resource fairs. Refer to the following website for details of their operations http://communitydiversitygroup.com/

F&B continues to provide financial assistance for training materials as well as release time for the employees that assist in the sessions. The diversity training in the community compliments our efforts to recruit and retain a diverse workforce.

**Conclusion**

Even with the size and distinctive units of F&B, we feel we have made satisfactory progress during this period. We have been able to identify our major areas of concern as well as what are reasonable and manageable expectations for improvement. We have also learned that this can be a slow and sometimes daunting process that requires the creativity and fortitude of many individuals and groups. We remain confident that we can achieve more tangible results as we move forward in the 2010-15 Framework to Foster Diversity.
Appendix 1

TOGETHER...

The F&B Diversity Key Initiative’s primary goal For more information on the Fostering Diversity is to develop and implement a recruitment and Key Initiative, visit: retention plan that ensures a diverse workforce www.fandb.psu.edu/diversity/ within Finance & Business.

Goals
Our goals include implementing the Framework to Foster Diversity, increasing the retention of racial minorities within F&B, maintaining a positive climate of inclusiveness, and establishing accountability tools to assess diversity efforts within F&B. We also strive to provide beneficial professional development opportunities, such as diversity-related speakers and activities.

Join In
We encourage you to let your voice be heard. If you have any questions, thoughts, or ideas, or would like to be involved with our key initiative, feel free to contact us.

www.fandb.psu.edu/fbdiversity/contactus.shtml

Lydia Abdullah
Key Initiative Manager
Email: lpa1@psu.edu Phone: 814.865.7641 For more information on the 2008-2013 Finance & Business Strategic Plan, visit
COMMUNITY...
F&B is committed to taking the necessary steps to create and maintain the most friendly and welcoming atmosphere possible within all of its units. The members of the Fostering Diversity Key Initiative represent a variety of areas and bring ideas and talents that advocate this ideal work environment that F&B and Penn State strive to create.

Message from the Key Initiative Manager

Finance & Business handles many of its everyday challenges through its key initiatives and takes advantage of the many opportunities that present themselves at each level of the organization.

Lydia Abdullah
Key Initiative The Fostering Diversity Key Manager

Initiative Committee sees a great deal of opportunity and potential in our goals to enhance the diversity of F&B. We work together to build a friendly and enjoyable environment to all who visit any of our campuses across the Commonwealth.
We are confident in our leadership and know they will continue to give us the support and assistance that this organization needs to reach its diversity goals. Through our programs, initiatives, action items, and committee work, we know we are getting closer to reaching those goals that will create and maintain a stronger and more diverse workforce within F&B and the University.

BUILD...
Framework to Foster Diversity
Similar to our strategic planning process, Penn State creates a plan for its approach to diversity issues at the University called the Framework to Foster Diversity. Every five years, the framework takes a fresh look at diversity topics and issues at the University and constructs challenges that promote a friendly working and educational environment for all.

www.equity.psu.edu/framework/
Internship Program
Our Diversity Internship Program gives graduating seniors or recent graduates an inside look at the operations of F&B at Penn State.

The six-month internship pairs up an F&B unit with a student that has a similar major and/or concentration. By working with the professionals at F&B, the intern gains skills and increasing responsibility in his or her areas of interest.

This is a great opportunity and the knowledge and connections gained with F&B professionals and beyond are priceless.

www.fandb.psu.edu/fbdiversity/internprogram.shtml

Mentoring Program
Penn State’s Finance & Business Diversity Mentoring Program is designed to be a development opportunity to welcome new underrepresented racial/ethnic employees. This 12-month program helps new employees adjust to their new working environments through the help of an experienced mentor within F&B.

www.fandb.psu.edu/fbdiversity/mentoring_program.shtml

Other Programs and Activities
Aside from being an essential part in the planning of the F&B Framework to Foster Diversity, we also host focus groups that discuss issues that affect employees of color and women, as well as disabled, white male, and lesbian/gay/bisexual/transgender employees. We offer several programs to recruit and maintain a diverse workforce. We do this through programs like mentoring and internship opportunities, as well as our Diversity Talent Bank. The bank is a collection of diverse job candidates that assists F&B units in connecting with qualified, diverse prospective employees. Our committee also oversees the organization of the F&B Diversity Climate Survey, as well as the implementation of action items based on the survey’s results.

The committee promotes and is involved in numerous diversity groups, activities, and events at Penn State and in our nearby
communities.
We are also involved in F&B's supplier diversity and construction efforts, which help support minority owned businesses across Pennsylvania.
2007 F&B Diversity Climate Survey Highlights

- Good return rate – 34% (especially from Technical Service ranks)
- 6% have identified themselves as not heterosexual (increase from 5.4% in 2001 survey)
- Majority of respondents are comfortable with the diversity climate; however, this is not across all units
- Climate is still the least comfortable for LGBT employees:

  26.8% of LGBT employees report having personally experienced an act of intolerance in the last 3 years... as opposed to only 9.6% of heterosexual employees.

  37.5% of LGBT employees would not be comfortable reporting an act of intolerance... as opposed to 25.3% of heterosexual employees.

  17.6% of LGBT employees do not view management as committed to diversity... as opposed to only 6.5% of heterosexual employees.

  LGBT employees report increased occurrences of insensitive/non-inclusive language/behavior, offensive or inappropriate behavior, and display of inappropriate material.

- Women are the second least comfortable group
- More respondents see management as committed to diversity
- Slight decrease in experienced or observed acts of intolerance and decreased frequency of these acts
- “Job status/classification” most often reason felt for denial of promotions, professional development, etc.; formerly “gender” was most often the reason
- Over the past 3 years, most feel there are improvements within work units of F&B but not PSU
- Although training is still seen as the best step to improve the climate, it has decreased with each survey
- 25% feel that we have “done enough “ and 21% feel “nothing more” is needed (supported in open-ended comments)
- Assessment of focus on diversity varies by F&B, work unit and PSU – fewer see it as a top priority than 2001
- 9% of females felt that they were under unfair scrutiny by management because of their gender versus 2.6% of males.
Open-ended Comments or Responses by Demographics:

- Backlash – white males and Christians
- Perceptions – hiring unqualified minorities; diversity programs give an unfair advantage to some; no actions are taken when acts of intolerance are reported
- African American employees responses differ from other racial groups; tending to be less positive
- Confirmed fear of repercussions/retaliation
- Women’s responses do not vary significantly from men in most cases; women are more positive about diversity in their work unit but less in PSU overall
Finance & Business
Summary of 2008 Administrative Unit Head Follow-up Responses
2007 Diversity Climate Survey

Ten detailed questions were included in the report to assess the level of involvement by management with the staff in addressing diversity related issues brought to the forefront in the 2007 Diversity Climate Survey. It is evident from the responses that an effort was made by each Unit Head to include staff in discussions and solicit their feedback and some units took this opportunity to seriously connect with the staff and address the challenges.

The first three questions of the follow-up survey were designed to assess if action was taken to review the 2007 Diversity Climate Survey with the staff. The next few questions address feedback and follow-up strategies. Additional questions pertained to mechanisms or specific actions taken to address the concerns brought forth by the staff. Finally, the questions focused on improvements and ideas for better participation. The gradual probing from general to more specific questions was to encourage focused deliberation on the part of the respondents. Below is a synopsis of responses for each question.

1). Describe, specifically, how the 2007 Diversity Climate Survey results were shared throughout your entire administrative unit. How was staff feedback solicited and acknowledged?
All respondents shared the survey with their staff, mostly during staff meetings. Police Services sent the survey electronically.

2). What were areas of improvement in your area since the 2001 diversity climate survey?
Overall, units reported the comfort level for diversity had improved in all categories. In addition some units reported increased satisfaction with managements’ role in improving the climate for diversity.

3). What were the issues in your area that needed to be addressed based on 2007 results?
Even though there was an overall sense of accomplishment and an improved diversity climate, there were still issues mentioned that need further attention or at least acknowledged. A summary of those responses include:
• One theme that resonated was the fear of retaliation if acts of intolerance are reported to supervisors.
• One unit reported employees felt that certain job related opportunities were denied based on job classification, staff exempt vs. non-exempt status and education level (those with and without college degrees).
• Also identified to be addressed was bias against LGBT employees.
• Response indicated that white, Christian males feel underrepresented.
• There is a lack of racial diversity on the staff and a need to increase general awareness.

4). How have you addressed the issues identified as challenges? What steps have been taken to improve the climate to be more comfortable for the various underrepresented groups?
Most respondents said they had addressed the issues identified as challenges. 14 of the 19 respondents provided details of the steps taken. Other units reported addressing issues through professional development opportunities, educational sessions, staff meetings, and personally taking the responsibility of action when acts of intolerance are witnessed.

5). What feedback did you get from the staff after your meetings or communications?
Overall, the staff was pleased that the results were being shared with them and that management was genuinely seeking recommendations.

6). What actions did you take to follow-up and what actions are planned for the future?
Survey results have been considered seriously and changes have been identified to make positive changes and improve the diversity climate.

7). Share some success stories of how you and your leadership team have demonstrated a personal commitment to diversity.
Human Resources staff in A&BS has provided counseling to diverse groups especially in the first few months of employment. The staff has also made itself available in becoming involved in helping diverse candidates establish a new home.
H&FS gave an example of how a manager reacted swiftly to an inappropriate remark by one his employees. The manager offered support and training opportunities to this employee and discussed with them the importance of appropriate behavior.
Transportation Services includes some form of diversity training during their annual retreat. Each year a new team is formed to plan the event so everyone gets an opportunity to participate and offer ideas on training and activities.
Procurement Services has provided opportunities to approach supervisors. Management has also reinforced that offensive language or insensitive humor will not be tolerated.
PSHS has displayed true commitment to diversity by:
• Active participation in the F&B diversity internship.
• Mentorship and hiring individuals with disabilities.
• Developing partnerships with the University’s Commission for Racial/Ethnic Diversity (CORED), the American Association of University Women (AAUW) and the Association for Retarded Citizens (ARC).
Other Units in A&BS have:
- Supported the Community Diversity Group, a State College Area non-profit group that promotes diversity with a mission to foster an inclusive community which attracts and retains a pool of potential employees and residents from diverse ethnic groups.
- Included diversity as a regular topic of conversation at directors’ meetings and in one-on-one meetings.
- Supported the diversity intern program by sponsoring several interns over the past few years and made every effort to retain interns within F&B.

Office of the Corporate Controller – The staff in one unit has participated in over 12 weeks of sign language training to communicate with deaf employee in the unit. The same unit has embraced Adobe connect and has silent meetings with this employee. Another unit sponsors a table for the Martin Luther King banquet.
Office of Investment Management – 50% of the staff are diverse including one person with a disability. This unit also hired a diversity intern upon completion of the internship program.
Other units reported making efforts in hiring minority candidates either by attending job fairs or recruiting diversity interns.

8). Describe any activities or mechanisms in your administrative area that have been effective in fostering diversity and/or improving the climate for diversity.
Most units indicated that open honest communication has helped. Some units invited special speakers including John Amaechi. Mentoring and training programs, participation in the Fostering Diversity Key Initiative Team and in associated Focus groups were also noted.

9). What opportunities would you provide (or have you provided) to your staff or what changes would you like to make in your unit to improve the overall diversity climate?
Once again the common theme here was better communication and finding ways to integrate diversity in daily activities. More diversity training especially to OPP was recommended considering the different work hours of their employees. PSHS has a very clear philosophy and policies with respect to diversity which they share with new employees.

10). For future surveys, how could we encourage better participation?
Some of the recurring themes for better participation are:
- Employees need to be reassured that the surveys are confidential.
- Provide the option of paper copies, especially for technical service employees.
- Encourage managers and supervisors to talk to employees prior to the survey and perhaps provide some group time during work hours to complete the survey.
- Time the survey to ensure all employees are able to participate including the summer-off employees.

Appendix 4
Fostering Diversity Focus Group Topics

Fear of Retaliation in the Workplace

Employee Headcounts by Gender and Ethnicity

Acts of Intolerance Statement

New Employee Orientation Diversity Module

LGBT Diversity Education Topics: “Straight Talk” and “Transgender 101"

F&B Diversity Website

2007 F&B Climate Survey Results

Diversity Resources (websites and documents)

Framework to Foster Diversity Reports

Accountability for Diversity Initiatives

Diversity as a Core Factor in Annual Reviews

Equity in General Salary Increases

Same Sex, Domestic Partnership Policy

2008 Faculty/Staff Survey Results
# Finance & Business: Employee Headcounts
## By Race & Gender

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## Appendix 6

### Finance & Business: Diversity Internship Program Participants

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<th>Results During/After Internship</th>
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<th>PSU Termination Date</th>
<th>F&amp;B Rehire Date</th>
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<td>Cleon Smith</td>
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Appendix 7

Finance & Business Mentoring Program Participants (mentor/mentee)

09/10 Class:
Lisa Wandel and Ying Tang
Judy Mudgett and Bing Zhu
Michele Baroshand and Milea Perry
David Manos and Michael Jackson
Steve Maruszewski and Kofi Ofori
Janet Decker and Shufang Lee
Jason Godinez and Larry Murray
Rahul Shrivastav and Stacy Hollar
Sonali Dalal and Jillian Crayton

08/09 Class:
Greg Scott and Jason Browne
Karen O’Brien and Ephrem Karegeya
Dan Sieminski and Melanie Medina
Mary Jane Fisher and Maritza Resto
Debbie Meder and Jose Reyes

07/08 Class:
Steven Maruszewski and Jason Godinez
Susan Rutan and Elizabeth Anne Christo-Baker
David Manos and Margarita Palomino
Marianne Karwacki and Liliane Arame
Lloyd Rhoades and Asmara Gebremedhin

06/07 Class:
Mark Bodenschatz and Maurice Freeman
Karen O’Brien and Cecille Orabona
Chad Spackman and Rahul Shrivastav
Deb Johnson and Kenesha Bentley

05/06 Class:
Roseann Sieminski and Juanita Bowser
James Smith and Abbas Badani
Kelley King and Olga Perez
Billie Willits and Minnie Reska

04/05 Class:
Deb Blythe and Emma Tackie
Jay Sonti and Sonali Dalal
Wes Bumbarger and O’Ryan Goring
Joan Coble and Ok Soo Yoon
Tyrone Parham and Kenneth Frederick
Gail Gwymn and Yong Joo Kim
Appendix 8

Finance & Business
Opportunity Network for Employment Program Participation

Employment Data from July 1, 2006 through June 30, 2007

Seventeen persons with disabilities obtained employment in Finance and Business in these hiring units:

Hospitality Services hired 7 employees through the ONE Program
  • 2 people were hired as part-time Kitchen Stewards at the Nittany Lion Inn
  • 2 people were hired as part-time Public Space Attendants at The Penn Stater
  • 1 person was hired as a part-time Refreshment Break Attendant at The Penn Stater
  • 1 person was hired as a part-time Break Room Attendant at the Nittany Lion Inn
  • 1 person was hired as a part-time Laundry Worker

Housing Services hired 4 employees through the ONE Program
  • 2 people were hired as part-time Recyclable Collectors
  • 1 person was hired as a part-time Staff Assistant in the Assignment Office
  • 1 person was hired as a part-time Mailroom Helper in Findlay Mailroom

Food Services hired 2 employees through the ONE Program
  • 1 person was hired as a full-time Grade 9 Dining Hall Worker A in Waring Commons
  • 1 person was hired as a part-time Kitchen Worker in Waring Commons

The Office of Physical Plant hired 2 employees through the ONE Program
  • 1 person was hired as a full-time Grade 10 Janitorial Worker
  • 1 person was hired as a part-time Janitorial Worker

The Office of Human Resources hired 1 employee through the ONE Program
  • 1 person was hired as a part-time Staff Assistant in the Employment and Compensation Division

Other
  • 1 person was hired as a temporary Staff Assistant in Gary Schultz’s office

Employment Data from July 1, 2007 through June 30, 2008

Twelve persons with disabilities obtained employment in Finance and Business in these hiring units:

Hospitality Services hired 4 employees through the ONE Program
  • 1 person was hired as a part-time Cold Food/Prep Cook at the Nittany Lion Inn
  • 1 person was hired as a part-time Laundry Worker
  • 1 person was hired as a part-time AV Setup Worker at The Penn Stater
  • 1 person was hired as a part-time Break Room Attendant at the Nittany Lion Inn

The Office of Physical Plant hired 3 employees through the ONE Program
  • 2 people were first hired as wage payroll janitorial workers, where they worked 40 hours a week
for about 20 weeks. They were both subsequently hired within this fiscal year as full-time Grade 10 Janitorial Workers when full-time jobs became vacant and went outside the union.

• 1 person was hired as a seasonal Landscape Crew Worker

Food Services hired 2 employees through the ONE Program

• 1 person was hired as a part-time Kitchen Worker in Waring Commons
• 1 person was hired as a part-time Cashier in Findlay Commons

The Office of Human Resources hired 1 employee through the ONE Program

• 1 person was hired as a part-time staff assistant in the Records Department

Housing Services hired 1 employee through the ONE Program

• 1 person was hired as a part-time Recyclable Collector in South Halls

Auxiliary and Business Services hired 1 employee through the ONE Program

• 1 person was hired as a part-time dishwasher at the Bryce Jordan Center

**Employment Data from July 1, 2008 through June 30, 2009**

Twelve persons with disabilities obtained employment in Finance and Business in these hiring units:

Hospitality Services hired 5 employees through the ONE Program

• 1 person was hired as a part-time Kitchen Steward at the Nittany Lion Inn
• 1 person was hired as a part-time Guest Room Attendant at The Penn Stater
• 1 person was hired as a part-time Refreshment Break Attendant at the Nittany Lion Inn
• 1 person was hired as a part-time Food and Beverage Services Worker at The Penn Stater
• 1 person was hired as a part-time Kitchen Steward at The Penn Stater

The Office of Human Resources hired 2 employees through the ONE Program

• 1 person was hired as a full-time Staff Assistant IV/Receptionist
• 1 person was hired as a part-time Staff Assistant in the Human Resource Development Center

Food Services hired 2 employees through the ONE Program

• 1 person was hired as a part-time Cashier in Simmons Commons
• 1 person was hired as a part-time Food Services Worker in Waring Commons

Housing Services hired 2 employees through the ONE Program

• 1 person was hired as a part-time Recyclable Collector in South Halls
• 1 person was hired as a part-time Mailroom Helper in Findlay Mailroom

The Office of Physical Plant hired 1 employee through the ONE Program

• 1 person was hired part-time to remove gum from sidewalks
Appendix 9

Finance & Business Administrative Fellows

Program Year/Fellow/Vice President Mentor:

1986-87
Patricia Farrell (Steve Garban)

1987-88
Mary M. Dupuis (Steven Garban)

1988-89
Roseann K. Sieminski (Steven Garban)

1989-90
Lydia P. Abdullah* (Steven Garban)

1990-91
Edie C. Hertzog (Steven Garban)

1991-92
Silvia Cabrera* (Steven Garban)

1992-93
M. Rachel Miller (Steven Garban)

1993-94
Janeen M. Grasser (Steven Garban, Gary Schultz, James Wagner)

1994-95
Cynthia L. King* (Gary Schultz & James Wagner)

1995-96
Robin L. Anderson (Gary Schultz)

1996-97
Gail A. Hurley (Gary Schultz)

1997-98
Terri L. Parker* (Gary Schultz)

1998-99
Linda C. Strauss (Gary Schultz)
1999-2000
Susan J. Wiedemer (Gary Schultz)

2003-04
Edward N. Thompson* (Gary Schultz)

2004-05
Rachel Smith (Gary Schultz)

2008-09
Jody M. Heckman (Gary Schultz)

*indicates a person of color
### Leadership Centre County Participants from Finance & Business (Sponsoring Unit and Class Year)

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<td>Jay Sonti*</td>
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+++++++++++++........................................................................................................

**Bold** indicates person of color. **Pink** indicates female.

* indicates currently in a leadership position at Penn State.
Appendix 11

Fostering Diversity Key Initiative Team

**Key Initiative Manager**
Lydia Abdullah — University Budget Office - lpa1@psu.edu

**Team Members**
Duane Bullock — Auxiliary & Business Service - dmb5@psu.edu
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