



**Oregon State
University**

**President and Provost's Leadership Council
for Diversity, Equity and Inclusion**

**2022-2023
Annual Report**

I. Executive Summary

The President and Provost's Leadership Council on Diversity, Equity and Inclusion (PPLC) is charged with collaboratively designing and implementing initiatives to advance the university's inclusive excellence mission.

Each year, the PPLC selects a strategic priority to focus its work. The retention and success of minoritized employees is necessary for the university to realize its highest aspirations for teaching, research and engagement. During the 2021-22 term PPLC sought to advance a systemic approach to improve the retention and success of employees through the development of an *Employee of Color Retention and Success Strategy*.

Through deliberation and engagement with a wide array of community stakeholders, the *Employee of Color Retention and Success Strategy* prioritized goals and actions aligned with Strategic Plan 4.0 and the university's diversity strategic plan to positively impact the retention and success of employees of color, including those who identify as Black, Indigenous, Latine, Asian, Middle Eastern and of mixed racial or ethnic descent. In developing this strategy, the PPLC recognized experiences within minoritized racial and ethnic groups are not monolithic, and importantly, the strategy seeks to attend to intersecting minoritized identities like gender and socio-economic status. Importantly, efforts to advance support for employees of color will have outcomes that will benefit the entire employee community at OSU.

Building on successful efforts advanced during the 2021-22 term, the PPLC focused on ongoing implementation of five priority actions during the 2022-23 term:

1. Develop consistent opportunities for OSU to introduce new employees to the OSU community and learn from their experience to support success and belonging;
2. Build supervisor capacity to provide culturally equitable support;
3. Support opportunities for mentorship of employees of color;
4. Support livable communities within which OSU employees and their families reside;

5. Create a transparent strategy for communication and accountability for progress on goals and actions within the *Employee of Color Retention and Success Strategy*.

Workgroups focused on each of the first four priorities were led by PPLC members. The fifth priority was led directly by the Office of Institutional Diversity. This report outlines the progress of each PPLC workgroup during the 2022-23 term.

II. Introduction

The President and Provost's Leadership Council for Diversity, Equity and Inclusion (PPLC) is a university-level advisory group whose mission is to support the advancement of Oregon State University's highest aspirations for diversity, equity and inclusion.

Composed of university leaders, employee and student shared governance partners, and faculty experts, the PPLC engages stakeholders, reviews data, consults promising practices and deliberates actions to create equitable organizational change at Oregon State.

The activities of the PPLC directly advance and support [Strategic Plan 4.0](#) (SP 4.0) and [Innovate @ Integrate: Plan for Inclusive Excellence](#), the university's diversity strategic plan.

President Jayathi Murthy and Provost and Executive Vice President Edward Feser serve as the PPLC's executive sponsors. Scott Vignos, Vice President and Chief Diversity Officer, chairs the PPLC and the Office of Institutional Diversity provides support and coordination for its activities.

a. Charge

During its 2022-2023 term, the PPLC was charged with:

- Deliberate the prioritization and implementation of actions articulated in the *Employee of Color Retention and Success Strategy* developed by the PPLC during its 2021-22 term;
- Contribute to deliberations regarding close alignment and coordination of next iterations of the university's strategic plan and diversity strategic plan;
- Provide advice and counsel to the Office of Institutional Diversity regarding strategic alignment of diversity, equity and inclusion efforts across the university;
- Engage with diverse university communities to gather feedback, collaborate on initiatives and develop strong, continuing and supportive working relationships;
- Engage the president and provost on a periodic basis to provide progress updates; and
- Publish a report summarizing the work of the PPLC, any recommendations, and progress made on the university's diversity, equity and inclusion goals.

b. Membership

2022-23 PPLC members include:

- Teresita Alvarez-Cortez, Assistant Vice President for Strategic Diversity Initiatives, Office of Institutional Diversity
- Natchee Barnd, Associate Professor of Ethnic Studies, College of Liberal Arts
- Jon Boeckenstedt, Vice Provost for Enrollment Management
- Steve Clark, Vice President of University Relations and Marketing
- Howard Croom, Associate Athletic Director and Chief Diversity Officer of Student Services, University Athletics
- Kevin Dougherty, Associate Vice Provost and Dean of Students
- Taha Elwefati, President of Associated Students of Cascades Campus and undergraduate student
- Ana Lu Fonseca, Diversity, Equity, and Inclusion Development Specialist, Division of Extension and Engagement
- Alix Gitelman, Vice Provost for Academic Affairs and Senior Vice Provost
- Mike Green, Vice President for Finance and Administration
- Heather Horn, Vice Provost President and Chief Human Resources Officer (replacing Cathy Hasenpflug, University Human Resources)
- Jen Humphreys, Administrative Director, Office of the President
- Dan Larson, Vice Provost for Student Affairs and Provost's Senior Advisor for Operations
- Kate MacTavish, Associate Faculty, College of Public Health and Human Sciences and Faculty Senate President
- Kerry McQuillin, Affirmative Action Manager, Equal Opportunity and Access
- Philip Mote, Vice Provost and Dean of the Graduate School
- Janet Nishihara, Executive Director of Educational Opportunities Program
- Paul Odenthal, Senior Associate Vice President for Administration, Division of Finance and Administration
- Nana Osei-Kofi, Associate Professor of Women, Gender and Sexuality Studies, College of Liberal Arts and Director of Difference, Power and Discrimination Program
- Maryssa Reynoso, Diversity and Inclusion Director, Associated Students of Oregon State University and undergraduate student
- Rick Settersten, Vice Provost for Faculty Affairs
- Susan Tornquist, Dean of the Carlson College of Veterinary Medicine
- Irem Tumer, Vice President for Research
- Scott Vignos, Vice President and Chief Diversity Officer
- Damoni Wright, Associate Vice Provost and Executive Director of Student Experiences and Engagement
- Carolyn Warfield, Director, HR Strategic Partners, University Human Resources
- Bonny Ray, Executive Director, University Human Resources
- Stephen Jenkins, Executive Director, University Housing & Dining Services
- Steve Hoelscher, Associate Vice Provost, Operations, Stud Affairs
- Bruce Daley, Associate Vice President, Capital Planning and Facilities Operations

- Nicole Neuschwander, Director of Leasing and Real Property Management
- Robert Richardson, Manager of University Land Use
- Katie Fast, Executive Director of Government Relations
- Terry Meehan, Senior Associate General Counsel
- Jessica Brubaker, Assistant General Counsel
- Gloria Crisp, Associate Vice Provost for Faculty Affairs

III. Process

The PPLC and its subgroups met on a monthly cycle throughout the 2022-2023 academic year to deliberate and advance its priorities. Additional meetings were held outside of regular meetings to engage stakeholders and strategize implementation of actions.

Agendas and minutes from the full body PPLC meetings are available [here](#).

PPLC members met with stakeholder groups to generate ideas, collect feedback representing an array of perspectives and report progress. This included deliberating strategies, actions and approaches to positively impact the retention and success of employees of color in meetings with the following stakeholder groups including:

- Association of Faculty and Staff for the Advancement of People of Color (AFAPC)
- Family Resource Center
- Faculty Senate Executive Committee
- President’s Commission on the Status of Black Faculty and Staff Affairs
- President’s Commission on the Status of Women
- President’s Commission on Indigenous Affairs

Using feedback from community members, PPLC members met in workgroups guide for implementation of priority actions.

IV. Employee of Color Retention and Success Strategy Implementation

The *Employee of Color Retention and Success Strategy* was organized by priority in the fall of 2022. A structured process for reflection and discussion was created that allowed the PPLC to discuss the merits of “effort” and “impact” for each proposed action outlined in the strategy.

Each member used a rubric to assess a score for “effort” comprised of nuances of complexity of the action and the resources needed for the action to be accomplished. Members also determined an “impact score” comprised of factors that would allow an action to have traction within existing university projects and the beneficence of reach action.

After deliberation, the PPLC determined they would prioritize those actions that had the most perceived value of beneficence, that is, had the potential to bring the highest positive impact

directly to the lives of Employees of Color. This was determined with the understanding that many of these actions were longer-term actions, presented many interdependencies and some required significant resources to achieve. The group expressed a shared belief that it should not shy away from the more challenging actions but instead, show leadership in these complex actions, if the benefit to employees was impactful.

From this deliberation, five priorities were identified for implementation:

1. **Onboarding and communication:** Develop consistent opportunities for OSU to introduce new employees to the OSU community and learn from their experience to support success and belonging;
2. **Culturally equitable supervision:** Build supervisor capacity to provide culturally equitable support;
3. **Culturally equitable supervision:** Support opportunities for mentorship of BIPOC employees;
4. **Community livability:** Support livable communities within which OSU employees and their families reside;
5. **Continuous organizational improvement:** Create a transparent strategy for communication and accountability for progress on Retention Strategy goals and actions.

The first four of those priorities were organized into workgroups led by PPLC members with expertise or existing leadership in related areas. The fifth, continuous organizational improvement, was led directly by the Office of Institutional Diversity.

The following sections provide a comprehensive summary of the work undertaken by the PPLC in during the 2022-23 term. Each section is organized by priority goal, with an overview of the priority goal, a summary of work to date, identified barriers to success and plans for next steps.

- a. **Onboarding and communication:** Develop consistent opportunities for OSU to introduce new employees to the OSU community and learn from their experience to support success and belonging

Overview: The experience of employee onboarding contributes to how included or excluded new colleagues feel. Employees of color should feel as though they belong from day one. Providing a welcoming and inclusive onboarding process sets the tone for a person's tenure at Oregon State University, which lays the foundation for their knowledge or and experience working here. Onboarding is the university's first chance to develop a healthy relationship with employees. Thoughtful and inclusive onboarding enables employees to achieve high performance/success, psychological safety, and belonging.

Significant effort must be focused on building new employees of color confidence and trust that their ideas, questions, and concerns are welcomed and will be considered as we reach decisions. When an employee can bring their full self to work, we are more likely to inspire

employees to think boldly and creatively. Providing an inclusive environment that recognizes and appreciates the whole person is a step in the right direction to helping an employee of color have a stronger sense of belonging with Oregon State University.

The workgroup focused on the development of consistent university procedures to introduce new employees of color to the OSU community to support their success and belonging. Our objective related to developing a comprehensive, consistent, role-specific and location-specific onboarding process and platform for all OSU employees. To build responsive resources and experience, we need to learn from employees' current onboarding experiences to support their continued success and belonging and then use this information to then implement continual improvement in OSU's onboarding processes.

Progress: The workgroup began by conducting a review of the existing onboarding efforts with a focused attention on the experiences of employees of color. The team reviewed the University Human Resources website materials, including but not limited to, benefit resources, contact information for questions, specific onboarding resources for both employees and supervisors, and the centrally offered new hire orientation. From this effort, we identified several resources¹ and/or guidance that could be improved and conducted immediate updates to those online resources.

In addition, the workgroup reviewed the newly launched [Human Resources Service Delivery Portal](#) that provides greater visibility and access to both new hires and supervisors to identify where the employees are in their individual, central onboarding process. This resource is new and, hence, the best form of feedback received to date has been through both the current satisfactory survey and the listening sessions held spring term 2023. We anticipate learning far more detailed information from the planned employee of color focused group sessions to be held in fall term 2023.

The work group also worked toward the development of future initiatives that include, but are not limited to more specific ways in which supervisors can engage and support with the new employee of color from the onset of employment to further build a sense of belonging, including:

- Pairing incoming employees of color with an OSU mentor through a formal program;
- Meeting with the employee frequently and acknowledging that it will take time to settle into the community;
- Actively monitoring the workload of the new employee;
- Recommending the employee spend time building community in and outside of work; and
- Eliciting and being open to candid feedback from the new employee of color about their onboarding experience.

¹ Examples of created and/or updated resources include Corvallis and Bend area community resource guides, as well as a listing of community diversity and cultural resources.

The 2023 Higher Education Recruitment Consortium Job Seeker Survey results² support these future initiatives. Results demonstrate that minority and underrepresented employees seeking positions in higher education are looking for workplaces that provide connection and belonging, supportive supervisors, and a healthy workplace culture.

Barriers: For employees of color entering a workplace that is already lacking in diversity, the feelings of hesitation and nervousness can be even more acute than they are for their white identified counterparts. If onboarding is not done well it could lead to employees of color feeling as though a bait-and-switch tactic and may deter other employees of color from accepting employment with OSU.

We anticipate that changing the culture around the importance of employing units promoting and providing enough work time to the new employee attending a central onboarding program, as well devoting more time within the units to establish a well-planned orientation will take time and be a challenge given all the other competing demands on a supervisor's time. This will require change management and will need to be reinforced by university leaders.

Once we have gathered additional information from employees of color in the coming year, through targeted focus groups, we will need support from university leaders in reinforcing the importance of these efforts and prioritizing this additional time investment.

Next Steps: The workgroup is looking forward to listening, learning and evolving based upon feedback from new employees of color and their supervisors through the following forums scheduled for Fall Term 2023:

² [2023 HERC Job Seeker Survey Report](#)

Listening Sessions

Hosted by UHR professionals:

Asked generally how the onboarding process went in the first month.

Sought pain points experienced during employee onboarding and what things went well.

Future: Determine when during an employee's first 6 months did they feel most or least included.

Identify important information employees sought but did not receive.

Identify questions employees would have liked to have been asked to contribute to a successful onboarding.

Identify what other/previous employers have offered during onboarding that employees felt meaningful?

Focus Group: New Hire Employee Sessions

Identify facilitator.

Meet with employees of color as part of first focus group.

Hold sessions in October/early November 2023.

Promote focus group opportunities at the new employee breakfast.

Learn what employees seek/need from their community.

Learn what they seek/need from their supervisor.

Learn how best to offer stronger connections to resources sooner in their employment journey.

Focus Group: Supervisor of New Hires Sessions

Identify facilitator.

Meet with supervisors of employees of color.

Hold meetings in November 2023.

Learn more about the resources needed by supervisors.

Learn what assistance supervisors need in navigating discussions with new hires

Next steps on work and deliverables from July 2023-June 2024

- Conduct new employee of color hire listening sessions;
- Continue and enhance the employee onboarding satisfaction survey;
- Promotion of offering more Work/Life balance consultative appointments;
- Offer direct connection to university affinity groups for new hires;
- Increase the connection between the Chief Human Resources Officer with university affinity groups.

b. Culturally equitable supervision: Build supervisor capacity to provide culturally equitable support

Overview: The supervisory skill of leaders at institutions of higher education are central to determining the success of units and the productivity, satisfaction, development and retention of employees. We recommend the university develop and implement a training program that elevates the capacity of supervisors to provide culturally equitable supervision (CES) through building specific abilities and skills proven to advance the understanding in complex topics related to cultural identity.

This proposed plan is being made in alignment with the PPLC's focus on improving the retention of diverse faculty – in this case, fostering employee satisfaction by strengthening supervisors' support and responsiveness to employees' needs. Developing and enhancing supervisory competence in this domain will also have the secondary impact of improving the experience and retention of all employees.

We define “retention” to mean that individuals remain employed at OSU, in any capacity. This is important because professional faculty and staff who change units often do so for opportunities related to career growth, development, or experiences within their unit.

The two priorities of this workgroup are to foster initiatives to improve faculty and staff retention by:

- Developing supervisors' knowledge, skills, and ability to engage with employees' unique identities ("intersectionalities") and needs; and
- Developing expectations and capacity for supervisors to conduct periodic "stay interviews" with all employees.

The focus of workgroup activity to date have been on the first priority, which is larger and comprehensive in scope and requires both immediate and long-term effort and resources. The second priority is a practice that UHR is already working on and will eventually implement.

Progress: The workgroup has been immersed in the research literature, probing best practices related to supervision and identifying aspects of supervision that are aligned with the “culturally equitable” part of supervision and support. Surprisingly, this remains an uncommon approach in higher education.

Some of our starting-point assumptions are that:

- All supervisors should experience some training specific to this domain, regardless of their role. “Supervisors” range from senior leaders; department chairs, school heads, and associate deans; academic faculty who mentor graduate students and postdoctoral fellows; and all ranks of professional faculty who supervise others;
- Training will require ongoing effort of supervisors and investment of the university with respect to training efforts (anticipate 3-5 years in total);
- The mindset of training must reinforce the need to deepen and expand competencies. It is not deficit-based. Rather, it meets supervisors where they are and envisions a process of continuous growth;
- Culturally equitable supervision will require intentional cultural change and a model for managing it.

Other decisions to date include the need to:

- Design trainings around the set of nine DEI competencies³ developed by the Office of Institutional Diversity and/or the most pertinent competencies of the University’s Managerial Competencies Framework (MCF)⁴;
- Much content will need to be built from scratch. In the meantime, there are existing trainings and resources to build on, such as Leading and Managing Change and LinkedIn library videos, which are also being mapped against the MCF;
- Training completion will be included with annual review processes: goal-setting, reporting, self-assessments, and assessments of supervisors;
- Launch and learn via pilot work with 2-3 OSU units;
- Evaluate the success of pilots through pre- and post-pilot assessments, combined with exit survey, turnover analysis, and qualitative data with pilot participants;
- As the program becomes more comprehensive, partner with a unit like PACE or identify a system for tracking trainings, such as Bridge. We could also consider creating a system of badges to offer upon the completion of a certain number or sequence of trainings;
- Determine the level of accountability. Specifically, making the decision on the requirement for this training as well as the accountability for those who don’t follow through;
- Determine resources needed to build, roll out and maintain the program.

Barriers: To move forward, several partners and resources will need to be put into place:

- Content expertise and effort in the instructional design of curriculum and implementation;
- Communications expertise and effort in the design of messaging and materials;
- Funds and effort to ensure the success of pilot projects, once designed;
- Embarking on this journey means a culture change which will be met with resistance and will need buy in.

Next Steps: Between June and December 2023, key next steps in the “prework phase” are to:

³ These competencies are: (1) appreciating the complexity of identity; (2) recognizing processes and outcomes of socialization; (3) using inclusive and affirming language; (4) embracing collaboration across difference; (5) practicing cultural humility; (6) attending to environmental factors; (7) engaging the here and now; (8) redressing past and present; (9) maintaining global consciousness.

<https://diversity.oregonstate.edu/guidance-diversity-equity-and-inclusion-learning>

⁴ For example, including but not limited to cultural competency (in domain of talent development); inclusion, communication, community building, responsiveness (in domain of leadership skills); humility and emotional literacy (in domain of intrapersonal skills). The MCF implementation team is currently pruning the framework in ways that also connect competencies firmly to measures in organizational behavior and industrial/organizational psychology. <https://hr.oregonstate.edu/training/managerial-competencies-framework>

- Align workgroup definitions or perspectives on "culturally equitable" mentoring (versus supervision);
- Finish project plan and confirm resources;
- Settle on targeted competencies;
- Build in systems of accountability, both in taking trainings and in annual review processes;
- Determine the criticality of CES training relative to other supervisory training needs;
- Design, build and test the curriculum – developing new material and compiling any existing resources for training;
- Identify pilot units through strategic sampling (e.g., academic and non-academic units, units with a mix of faculty types; units that desire and are ready for change);
- Build and conduct pre-pilot competency and retention assessments.
- Create a change management plan.

Thereafter, we envision success phases of design, piloting, assessment, and decision-making in the 18 months thereafter (January 2024-July 2025).

c. Culturally equitable supervision: Support opportunities for mentorship of employees of color

Overview: Within the constraints of our limited expertise and time, we (a) attempted to inventory existing mentoring efforts and programs at OSU, (b) found software products that support mentoring, and (c) identified some universities with comprehensive programs we might emulate. We recommend hiring a consultant to assess the OSU landscape of mentoring, establish parameters for staff and faculty mentor models, recommend comprehensive mentoring training and tools, and advise us on how to ensure long-term success.

The priority of the work group was to respond to previously expressed BIPOC faculty and staff concerns about their unmet mentoring needs at OSU. These needs have been identified as limiting staff promotional and career pathways, and as creating unsatisfactory professional experiences and growth opportunities for faculty. This priority overlaps with the priority of the workgroup focused on "equitable supervision," so our workgroups agreed to keep open lines of communication and to eliminate redundancies wherever possible.

In discerning the best path forward to address unmet needs, the workgroup's first step was to solidify our knowledge base and identify appropriate best practices.

Progress: The following was completed or was in progress by June 2023:

- Existing mentorship (and tangential) programs at OSU were surveyed. The following was found:

- OSU does host some mentoring “programs” and most colleges make efforts to assign a mentor to each new faculty member, but they are inconsistent, uneven, and not centrally housed/visible – so some duplication of services is likely;
- None of the programs are centered on serving BIPOC employees, though some (e.g. CIMER) provide specific training on mentoring members of minoritized groups;
- Management training often substitutes for mentoring.
- Feedback
 - Discussion with Faculty Senate Diversity Council noted that any program must provide mutually beneficial outcomes for mentor and mentee, be robust and multiply constituted, reach all aspects of OSU (i.e., extension, Cascades, etc.), and be housed in a strategic “location” for maximum impact
 - The Faculty Senate Diversity Council discussion also suggested that any comprehensive program would greatly benefit from regional partnerships (such as with HP, LBCC, UO, PSU, etc.).
 - We recommend that any mentoring program design should extend beyond our institution.
- Identifying External Programs
 - Looking beyond OSU we found that there are several software platforms available to facilitate mentoring experiences, and that several other universities have more institution-wide programs that we should investigate more thoroughly;
 - Commercial mentoring platforms: MentorcliQ, Chronus, Together, River, Mentornity, Tenthousandcoffees;
 - University Mentoring programs: Michigan (new employees paired with experienced employees), UC San Diego (leadership fellows, mid-career and senior), MIT (skills-based mentoring), Texas A&M (mentoring culture), Wisconsin (Women in Science and Engineering Leadership Institute), UT-Austin (career development mentoring), University of Connecticut (Mellon Mentors using regional approach).
- Research
 - Our efforts to identify research-based assessment of other mentoring programs (i.e., a preliminary literature review) found the research was limited given our interests in institutional-level intervention;
 - Found that few external mentoring programs center BIPOC employees;
 - Observed that most mentoring research seemed to focus on student mentoring, or small-scale BIPOC mentoring models.
- Consultations
 - We consulted with several mentoring experts, consultant groups, and individuals with relevant experience in similar institution-wide mentor programs as part of our effort to identify relevant research literature and/or potential expert-contractors (see “barriers to progress” section below for more explanation). Held five consultations, and identified a sixth option (referral) for another possible consult.

- Program design recommendations
 - Build on or integrate existing mentorship programs;
 - Specifically support employees of color; Indigenous employees;
 - Use design that is adaptable and cost-effective;
 - Provide multiple pathways and layered modes of mentoring;
 - Offer appropriately differentiated sets of services for staff and faculty;
 - Think regionally.

Barriers: In terms of the progress made, the main barriers were time, capacity, and expertise. The subcommittee was tasked with making recommendations that would specifically improve mentoring for employees of color, and Indigenous employees.

Focusing on improving mentoring for these subgroups of employees was expected to positively impact all employees, following the wide-ranging impact of universal design when applied in other realms.

With limited time, the subcommittee needed to assess mentoring models that would positively improve outcomes for staff and faculty which each require differing models for major aspects of their roles. We spent time collecting data on what already existed at OSU, which is not collected elsewhere.

A secondary step required gathering information of known and proven models of effective mentoring. This included a literature review seeking research that had assessed such programs in other institutions. The time and capacity for these two steps alone required more effort than we could provide. While we gathered a partial survey of programs at OSU, the research component did not prove satisfactorily comprehensive. Since we lacked expertise in this area, both within the subcommittee and within the larger institution, we also engaged in several consultations in order to streamline our efforts and seek out support.

Following a PPLC gathering in which another participant suggested contracting an expert, we began a process of identifying candidates and reached out to several individuals engaged in large-scale mentoring projects.

Next Steps: Based on the responses from the Provost and President at the PPLC, the workgroup recommends moving forward with contracting a consultant who could more effectively and efficiently assess the OSU landscape of mentoring, establish parameters for staff and faculty mentor models, recommend comprehensive mentoring training and tools, and make recommendations for oversight and structural design.

Internally, we should complete the survey of existing mentoring programs, so that we might at minimum know the existing nodes that can be integrated into and new program/model. We can also begin to gather potential partners for a regional mentoring program.

d. Community livability: Support livable communities within which OSU employees and their families reside

Overview: A substantial barrier for OSU in the recruitment and retention of employees is access to affordable housing and other family resources, primarily childcare. This is a problem shared with other major employers in the Corvallis areas that requires a collaborative effort to lessen the problem.

The Community Livability workgroup is focused on two major areas to help address workforce housing and support needs. Our first objective related to housing access and affordability has been to identify partners within the Corvallis area community that are seeking to address similar workforce needs, and who have resources that can aid in developing solutions. A parallel effort, also in collaboration with Corvallis area employment partners has been to enhance OSU's suite of employee tools and resources related to accessing housing assistance and other community services.

The workgroup held an initial meeting with community partners in May 2023 to build a shared understanding of the problem and gauge interest in working together. Future engagements are planned to develop shared goals and find creative solutions that can be achieved through pooling resources and addressing barriers.

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Progress: Workforce housing and other services were prioritized. Over this past year, the workgroup has reviewed existing data on housing access and affordability, including rental and first-time housing accessibility, and in partnership with the City of Corvallis and has begun working closely with the City to better understand specific needs, market conditions and the regulatory environment. The City of Corvallis staff provided the workgroup, as well as potential partners with a comprehensive overview of the factors that have led to lack of available affordable housing, which has set a baseline understanding for the team as we move towards finding solutions.

The workgroup identified approximately 25 potential partners within the surrounding area, and from that list, prioritized a set of core collaborators who likely have resources to contribute towards a potential project. These resources include land assets, access to debt and/or cash, influence over development code and regulation, access to community, state, federal grants and programs, as well as occupancy commitment. Potential collaborators include:

- City of Corvallis
- Benton County
- Corvallis School District
- Samaritan Health Services
- Corvallis Clinic
- Hewlett-Packard
- Boys and Girls Club
- Linn Benton CC
- Corvallis Chamber of Commerce

The workgroup held its first convening with this group in May, where each shared their challenges associated with workforce housing/affordable housing and related services, primarily childcare. All attendees expressed interest to remain engaged with OSU in exploring creative and shared solutions. The workgroup has developed the agenda for the second convening, which will ask the collaborators to specifically identify (not commit) what resources they can contribute to a project(s), identify the barriers that have prevented development to date. The group will also begin to set targets and timelines for project development.

In the meantime, two members of the workgroup (Stephen Jenkins and Bob Richardson) will be meeting with the City of Corvallis to discuss the City's plan related to their obligations under House Bill 2001, which includes conducting community needs assessments and utilizing state funds to incentivize housing development.

Employee Resources

A member of the workgroup (Bonny Ray) met with Oregon Housing & Community Services (OHCS) Assistant Director Kim Freeman and her Assistant Director of Lending Scott Shaw on 6/8/23 to discuss the possibility of OSU working with OHCS on a Down Payment Assistance Program for our employees. This conversation began a year ago but could not progress until OHCS launched their Flex Lending program. They have indicated readiness to move forward with a down payment assistance plan unique to OSU if we are still interested, and a meeting to discuss scope is being scheduled for late June/July. The Flex Lending Program that OHCS manages provides a fixed-rate first mortgage in combination with a second mortgage in the form of either a silent forgivable second lien or an amortizing repayable second lien. Additionally, DPA funds may be used for up to 100% of the borrower's cash requirement to close, including down payment, closing costs, pre-paid items, upfront borrower-paid mortgage insurance, and other related loan fees and expenses. OSU's plan would provide additional DPA funds to employees.

University Human Resources has also updated their employee resources website for relocation and housing resources, which include:

Advantage Home Plus

Advantage Home Plus provides financial education, information on down payment or grant assistance programs and savings when buying, selling, or refinancing a home. They provide access to non-commissioned advisors who can provide guidance as well as discounts on closing costs, escrow, inspection and moving fees.

Property management and rental agency lists including off-campus options & temporary housing

Programs through Oregon Housing and Community Services resources:

- General Home buying services that Oregon Housing and Community Services partners with Homeownership Centers throughout the state to provide:
 - Homebuyer Education
 - Financial Literacy Education
 - Homebuyer one on one Counseling
 - Financial Literacy one on one Counseling
 - Default and Foreclosure one on one Counseling
 - Post-purchase one-on-one Counseling

We are working on setting up meeting times for late June/July.

Oregon Bond Residential Loan Programs - Income limits and purchase price limits

- Assists low and moderate-income families in Oregon buy their first home with below-market rate financing and cash assistance through the Oregon Bond Residential Loan Program;
- Provides a below-market rate to help eligible families increase their home purchasing power and lower their monthly house payments;
- Homebuyers apply for the program with an approved lender;
- Loan Option 1: Cash Advantage - the borrower gets a competitive interest rate on their home loan along with cash equal to 3% of their loan amount. The cash assistance will help reduce the total closing costs needed to buy the home. Borrowers cannot use Cash Advantage funds for the minimum investment required for an FHA Loan;
- Loan Option 2: Rate Advantage - Eligible borrowers will receive the lowest fixed rate possible to maximize their home purchasing power with an affordable payment.

Flex Lending Program

- Provides a fixed-rate first mortgage in combination with a second mortgage in the form of either a silent forgivable second lien or an amortizing repayable second lien;
- DPA funds may be used for up to 100% of the borrower's cash requirement to close, including down payment, closing costs, pre-paid items, upfront borrower-paid mortgage insurance, and other related loan fees and expenses.

Barriers: While there are no current barriers to progress, we anticipate that addressing workforce housing and childcare needs will require significant investment from OSU, as it will

from other partners. Housing as a financial project will likely provide a return on investment, however there is no business model that can provide for quality early care and education without subsidy. This can come in the form of grants, which are becoming more available, and as we develop scale across OSU and with partners, the projects could become more viable.

As we move towards defining projects, OSU will need to determine if providing workforce housing and additional childcare services is a priority investment.

Next Steps: By December 2023, the workgroup anticipates having clarity on which partners are willing to commit resources to a shared project(s), will have identified the development code/regulations that need to be prioritized for City leadership to address, and a rough scope of project goals.

- e. Continuous organizational improvement:** Create a transparent strategy for communication and accountability for progress on Retention Strategy goals and actions.

Overview: Successful implementation of the *Employee of Color Retention and Success Strategy* will require establishing metrics for success, access to reliable data to inform development of initiatives and allocation of resources, processes for accountability, and communication of progress and challenges.

During the 2022-23 term, the Office of Institutional Diversity worked with university stakeholders including Equal Opportunity and Access, University Human Resources, Faculty Affairs and University Information and Technology to advance the development of this strategy.

Progress: Progress made during the 2022-23 term includes the following:

- Launch of new employee exit survey delivered to all departing OSU employees;
- Development of first comprehensive employee retention data set disaggregated by role type, race/ethnicity and gender to discern retention trends among and between groups of employees, and benchmarks to peer institutions
- Development and launch of [Equity Data Insights Portal](#) providing comprehensive, unit-level data to university leaders regarding employee access, belonging and success;
- Completion of Inclusive Excellence Inventory providing unit-level data on employee retention efforts
- Integration of equity data into academic unit level review process;
- Development of proposal to align Affirmative Action compliance processes with proactive consultation to improve hiring and retention across demographic groups.

Barriers: Some ongoing barriers to be addressed include:

- Lack of capacity or time to utilize institutional data to inform employee retention efforts and practices
- Lack of agreed upon metrics of success
- Lack of general awareness of ongoing efforts regarding employee retention
- Lack of awareness of existing institutional resources to inform development of unit-level initiatives

Next steps: By June 2024:

- University retention data will be shared as part of the PPLC annual report
- Equity data dashboards will be expanded to include employee retention data and other relevant retention data
- Metrics for success regarding employee retention will be defined and adopted
- A strategy regarding communication of *Employee of Color Retention and Success Strategy* will be developed and adopted

V. Next Steps

The PPLC's efforts to advance this work will continue over the summer 2023. Updates will be provided to the university community at the conclusion of Fall 2023. Implementation and progress metrics will be tracked and published at regular intervals on the [PPLC website](#).

An essential component to success of this strategy will be ongoing consultation with community partners and iteration of the strategy as our understanding of trends and efforts that positively impact retention improve.