

University Development and Alumni Relations



Diversity, Equity, Inclusion, Belonging and Justice

Strategic Framework

October 2022

Table of Contents

Title	Slide No.	Title	Slide No.
Introduction	3	Our Culture Commitments	15
UC Berkeley Principles of Community	4	Timeline and Context	16
The Process (Assessment Phase)	5	UDAR DEIBJ Focus Areas	17
Phases and Milestones	6-7	UDAR DEIBJ Strategies	18
SWOT Analysis	8	UDAR DEIBJ Strategic Framework	19
The Process (Planning Phase)	9-10	Challenges	20
DEIBJ Definitions, Mission, Vision and Values	11	The Process (Implementation Phase)	21
Additional Support and Resources	12	DEIBJ Contributors	22-25
UDAR Organizational Journey Map 2025	13-14	Culture Champion Contributors	26

Introduction

In 2013-14 University Development and Alumni Relations (UDAR) created its first ever strategic plan for diversity, equity and inclusion as part of the broader campus planning efforts that followed the Haas Jr. Fund gift to Berkeley that, among other things, created the Division of Equity & Inclusion (E&I). In 2020, as social and racial injustice issues gained more traction across the nation and on our campus, it was time to review the plan with a renewed focus considering diversity, equity, inclusion, belonging and justice* (DEIBJ).

The Vice Chancellor, Julie Hooper, requested the development of a 3-5 year strategic plan that would address immediate and long-term goals of creating an inclusive environment where all perspectives, backgrounds and experiences would be valued and respected. The plan would align with the campus's principles of community and would include a strong statement of commitment to DEIBJ principles.

The Vice Chancellor appointed a DEIBJ Project Team (PT) to guide and support the process and determined that UDAR convene three working groups (WGs) to develop recommendations in the following focus areas:

- Learning and Inclusive Community
- Leadership Development and Career Pathways
- Fundraising Programs and Alumni Engagement

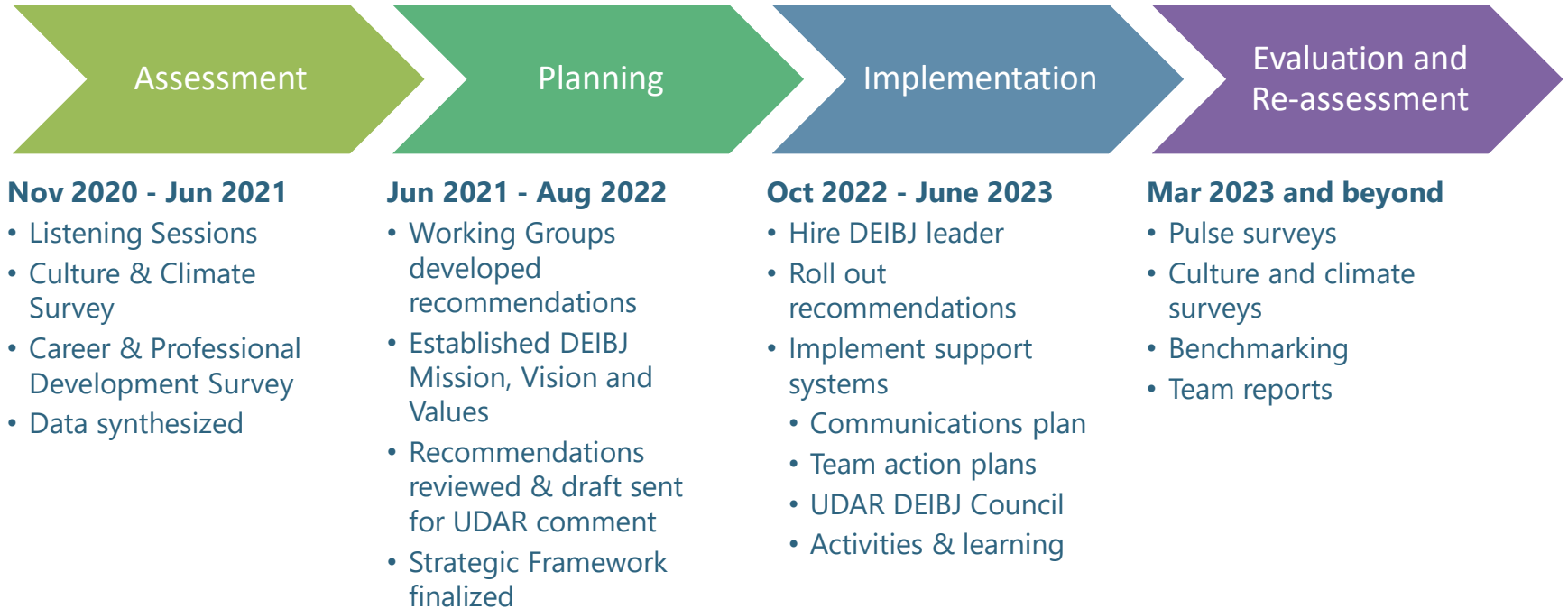
*Note that "justice" was added in August 2021 to align with the goals of the Division of E&I

UC Berkeley Principles of Community

These principles of community for the University of California, Berkeley, are rooted in our mission of teaching, research and public service. They reflect our passion for critical inquiry, debate, discovery and innovation, and our deep commitment to contributing to a better world. Every member of the UC Berkeley community has a role in sustaining a safe, caring and humane environment in which these values can thrive.

- We place honesty and integrity in our teaching, learning, research and administration at the highest level.
- We recognize the intrinsic relationship between diversity and excellence in all our endeavors.
- We affirm the dignity of all individuals and strive to uphold a just community in which discrimination and hate are not tolerated.
- We are committed to ensuring freedom of expression and dialogue that elicits the full spectrum of views held by our varied communities.
- We respect the differences as well as the commonalities that bring us together and call for civility and respect in our personal interactions.
- We believe that active participation and leadership in addressing the most pressing issues facing our local and global communities are central to our educational mission.
- We embrace open and equitable access to opportunities for learning and development as our obligation and goal.

Phases and Milestones



The Process

Assessment Phase
November 2020 – June 2021

Goals: Assess the current state of UDAR, identify opportunities and understand the forces working against us

The following contractors were secured to assist with gathering data:

- **Monroe France**, Associate Vice President for Global Engagement and Inclusive Leadership and Deputy Chief Diversity Officer, Office of Global Inclusion, Diversity and Strategic Innovation at New York University
- **Talmetrix**, an employee feedback, research and insights company helping organizations improve culture, employee experience and employee retention

November 2020 - January 2021

- Nine Listening Sessions were conducted and facilitated by Monroe France to gather input from UDAR staff on the division's commitment to diversity, equity and inclusion (161 participated)

November 2020 - March 2021

- Anonymous feedback about UDAR culture was open to all UDAR staff and gathered through an online feedback form

The Process

Assessment Phase

November 2020 – June 2021

February 2021

- Talent Management Workforce Planning (TMWP) distributed a Career and Professional Development Survey to assess employee-manager relations, onboarding and integration, job satisfaction, and professional development (53% response rate - 143 total)

March 2021

- Talmetrix conducted the Diversity, Equity, Inclusion and Belonging (DEIB) Culture and Climate Survey to assess employee commitment and intent to stay (70% response rate -189 total)

May 2021

- Data from anonymous feedback, listening sessions, Career and Professional Development survey, DEIB Culture and Climate survey, and exit interviews conducted by TMWP since June 2020 were collected and synthesized into a SWOT analysis

June 2021

- Data was shared with all UDAR at Town Hall through presentations by DEIBJ PT, Monroe France and Talmetrix

SWOT Analysis

<p>Strengths</p> <ul style="list-style-type: none"> • Managers are supportive of and inclusive with staff • Employees have positive beliefs and attitudes toward diversity and inclusion • Leadership is committed to DEIBJ • Many tools, resources and programs exist through People and Culture • UDAR features many campus DEIB efforts and Career and Professional Development (C&PD) efforts on the Eureka, C&PD landing page • Inclusion and Belonging is part of Achieve Together criteria • Implicit Bias training • Advancement Newsletter (communications) • Partnership in this en8 • deavor with BAC and staff assembly • Many staff have DEIBJ implementation experience outside of work 	<p>Weaknesses</p> <ul style="list-style-type: none"> • People of Color are having less favorable experiences • No clear pathways to career advancement • Pay equity • Organizational inclusion- perception of intolerance for some groups (e.g. politics, religion, age) • Lack of staff understanding of leadership’s priorities in DEIBJ • Lack of access to leadership (hierarchical structure) • Lack of communication between units • Lack of a platform for internal UDAR communications, community-building • Even though Inclusion and Belonging is part of Achieve Together criteria, the definitions on how this criterion is met remain puzzling for many. • UDAR culture favors extroversion, and therefore “quieter” voices get ignored or drowned out.
<p>Opportunities</p> <ul style="list-style-type: none"> • Leadership commitment (proactive, transparent, accessible, clear on goals) • Mentoring program for new or potential managers • Training/communication on how to access/use existing DEIBJ tools and resources • Safe spaces for staff to discuss true feelings about job or inclusion without retribution • Open conversations around diversity implications • Equitable promotions and pay (share UDAR’s new annual Equity Program Standards) • Create DEIBJ consulting teams to provide guidance on events, solicitations, strategies • Mandatory DEIB trainings (offered through P&C) • Using Achieve Together to accomplish individual contributions toward UDAR DEIBJ goals 	<p>Threats</p> <ul style="list-style-type: none"> • People of Color leaving at higher rates • Perception that there is a political agenda (liberal ideology) • Not everyone is bought into the DEIBJ initiative. Some don’t see this as part of their job (and therefore don’t feel the Achieve Together criterion of Inclusion and Belonging applies to them). • Fear of retaliation for speaking up • Fear of making mistakes/offending others and therefore remain silent or frozen to make change • When “excitement” wears off, defaulting to old ways of doing things (lip service) • Alienation of those who are not part of a diverse group

*Information taken from UDAR Listening Sessions (Dec 2020-Jan 2021), UDAR DEIB Culture and Climate Assessment Survey (March 2021), UDAR exit interviews, UDAR Professional and Career Development Survey (Feb 2021), and comments through feedback forms.

The Process

Planning Phase
June 2021 – September 2022

Goal: Define what DEIBJ means to UDAR, develop our mission, vision and values and create working groups to provide recommendations in the three focus areas

The following partners were secured to facilitate meetings on DEIBJ definitions, mission, vision, and values:

- **Pam Rich**, Organizational Consultant, People and Culture, UC Berkeley
- **Tasha Ryals**, Blue Beyond Consulting, an integrated management consulting firm

June - August 2021

- Project Team selected two WG co-chairs (one management team member and one staff member) to lead a group in each focus area
- WG members for the three working groups were selected by co-chairs and PT through nomination process

August 2021 - January 2022

- WG co-chairs, members and PT participated in 5 sessions to develop draft of DEIBJ definitions, statement of commitment, mission, vision and values

March - April 2022

- Project Manager with volunteer WG members offered four Mission, Vision, Value (MVV) Info Sessions to all UDAR to explain the process and seek input (90 participants)
- Feedback on the MVVs was collected through an online anonymous feedback form

The Process

Planning Phase
June 2021 – September 2022

April 2022

- Draft DEIBJ definitions and MVVs were shared at April Town Hall
- Definitions and MVVs were finalized and distributed to all UDAR with an explanation of how changes were made

August 2021 - August 2022

- WGs convened as needed, reviewed data and submitted final recommendations on June 6, 2022
- Monthly check-in meetings were held between PT and WG co-chairs to align on goals, discuss progress and areas of needed support, and share best practices

July 2022

- WGs and Management Team held two meetings to discuss process and ways to implement priority topics

August 2022

- Final recommendations, breakdown of tactics, of which 160 were recommended, and draft of strategic framework was shared with all UDAR and open for comment through anonymous online feedback form
- Strategic Framework finalized and shared at August Town Hall

September 2022

- Strategic Framework reviewed by Campus Equity & Inclusion and People and Culture departments
- Executive summary distributed to all UDAR and campus stakeholders

DEIBJ Definitions, Mission, Vision & Values



DIVERSITY

We want to invest in a diverse workforce

DIVERSITY is acknowledging and embracing what differentiates us as individuals to make us a stronger organization.

EQUITY

We want to reduce power disparities

EQUITY is a collective commitment to treating each other with respect and providing the resources and support for everyone to develop their potential by leveling access.



JUSTICE

We want our work to be ethical and meaningful

JUSTICE involves examining our practices and advocating for marginalized groups by actively removing barriers and creating equitable pathways for donors, students, volunteers, alumni and others we serve.

INCLUSION

We want to feel accepted as ourselves

INCLUSION fosters an environment that welcomes and accepts the humanity in all of us.

BELONGING

We want to feel comfortable, seen and heard

BELONGING is the feeling of being accepted as our full selves and connected to each other with the agency to both contribute to and influence the organization.



UNIVERSITY DEVELOPMENT AND ALUMNI RELATIONS DIVERSITY, EQUITY, INCLUSION, BELONGING AND JUSTICE

STATEMENT OF COMMITMENT

As individuals, we promise to operate with a growth mindset; align our actions with Berkeley's *Principles of Community*; embrace UDAR's DEIBJ definitions and values; and hold each other accountable; thereby positively impacting our organization, our stakeholders, the campus and society at large.

<h3 style="margin: 0;">MISSION</h3>	<h3 style="margin: 0;">VISION</h3>
<p style="margin: 0; font-size: small;">We cultivate a diverse and inclusive environment where vibrant discourse thrives and all backgrounds, experiences and roles are valued and respected.</p>	<p style="margin: 0; font-size: small;">UDAR strives to be a safe, inclusive and diverse community that celebrates and values our differences to dismantle structures of privilege and replace the status quo with bold approaches to Advancement that level access and create opportunity within our institute and for those we serve.</p>

VALUES

<p>AUTHENTICITY</p> <p>We foster an environment of trust where everyone feels welcome and safe to come as they are, while allowing space for further growth and evolution to become our best selves.</p>	<p>COURAGE</p> <p>We name the uncomfortable, speak up for the unheard, make difficult decisions, challenge our own biases, and learn from our mistakes.</p>	<p>COMPASSION</p> <p>We listen and act with curiosity and care, empathetic to the stories and struggles of our colleagues, students, donors, volunteers and alumni to build a more equitable future together.</p>	<p>COMMUNITY</p> <p>Collectively, we use the power of our diversity to promote equity, inclusion and justice for each other, the UC family and society at large.</p>
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Additional Support and Resources

During this planning process, we operated through a pandemic starting in a fully remote work setting that eventually moved to hybrid, witnessed high-profile racial injustices, endured a tense election year, and experienced the effects of a polarized nation. To best manage these uncertain times, we extended our timeline and occasionally pivoted from our scope of work to provide managers and staff with additional training, support and resources.

Additional support and resources for managers and staff included:

- February 2021 - Individual consultation between Monroe France and VC Julie Hooper
- March 2021 - Creating an Inclusive Workplace workshop for the Management Team led by Monroe France
- April 2021 - Developed and distributed flyer: 6 Things You Can Do To Embed DEIB in Your Work
- July 2021 - Talmatrix conducted a Train-the-Trainer session with Senior Management Team to help managers guide action planning using data with their teams
- March 2022 - PT developed a discussion guide for managers to lead team conversations on how to work by DEIBJ definitions, mission, vision and values
- May - September 2022 – TMWP rolled out monthly DEIBJ Activity Weeks through a newsletter with daily activities that focused on operationalizing our DEIBJ mission, vision and values in our work

UDAR Organizational Journey Map 2025

In September 2021, UDAR also undertook an organizational planning process, supported by Blue Beyond Consulting, to identify priorities outside of the *Light the Way* campaign. The result, completed in December 2021, was the UDAR Organizational Journey Map 2025.

As part of this process, Blue Beyond led us through the development of our Culture Commitments, which were finalized in August 2022. These Culture Commitments were rooted in our DEIBJ definitions, mission, vision and values and define who we are, who we want to be and how we aim to behave in order to achieve both our journey map and DEIBJ goals.

Ten Culture Champions interviewed 47 UDAR staff who shared thoughts about their desired culture. Like our DEIBJ work, these outcomes were informed using a multi-step engagement process that solicited and inputted feedback from all UDAR.

As team action plans are established, UDAR will activate steps to achieve our desired culture. These will factor into future implementation phases of this framework as appropriate.



UDAR Organizational Journey Map 2025



- Data/Technology
- Pipeline
- Talent
- DEIBJ
- Decision-Making
- Alignment

ASPIRATIONAL PROPOSITION

UDAR is diverse in its people, agile, and inclusive in its processes, and clear in its purpose to advance Berkeley's mission by raising more than \$1.5B a year in partnership with alumni, stakeholders, and the entire campus community.

FUNCTIONALITY INITIATIVES

- Launch and socialize **alumni, donor, and volunteer portals**
- Drive collaboration and efficiency through **productivity tools**
- Enable comprehensive **data exchange** so all systems are connected
- Develop and implement the **Pipeline Health Strategic Plan**
- Upgrade the customer relationship management (**CRM**) system

PEOPLE INITIATIVES

- Improve internal communications and **decision-making processes**
- Amplify Talent Management and Workforce Planning & Partner with People & Culture** to support recruitment, retention, **DEIBJ**, and career growth
- Offer UDAR-specific **professional development** opportunities (**DEIBJ**, hard skills, soft skills)
- Understand and respond to the **Future of Work** in a way that strengthens UDAR and builds community
- Become proficient at **refreshing the People and Functionality Initiatives on a continuous basis**

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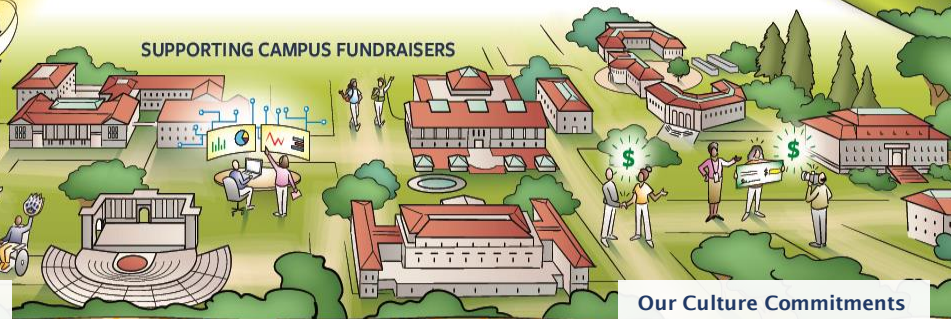
PRIORITIES

- Identify and implement **data strategies and technologies** that improve the constituent experience and our work
- Accelerate the development of a **healthy and diverse donor pipeline**
- Retain, attract, and grow** mission-driven, diverse, and high-performing team members
- Infuse **DEIBJ** into every aspect of our work by **acting on our DEIBJ Strategic Plan**
- Improve **decision-making** and **align resources with priorities**

...and BEYOND!



SUPPORTING CAMPUS FUNDRAISERS



DEIBJ Strategic Framework

Our Culture Commitments

DEIBJ STRATEGIC PLAN

ACHIEVE TOGETHER

Our Culture Commitments



We build a trusting and collaborative community

We commit to cultivating psychological safety, valuing differences, and communicating openly with mutual respect. We will build trust by striving for high-performance, accountability, and role clarity, and by celebrating and appreciating the contributions of everyone involved in achieving our fundraising and alumni relations mission.



We make decisions inclusively in support of our people

We acknowledge that hierarchies exist and each of us is committed to seeking input from those affected by our decisions. We will strive for inclusivity in our decision making, and for transparency in sharing how decisions are made, where decision rights sit, and the rationale behind decisions.



We seek and share information transparently

As a growing practice, we communicate regularly, in a way that is timely, transparent, inclusive, accessible, and clear. We also take responsibility to inform ourselves so we are all aware of processes, interdependencies, guidelines, rules, and other relevant information, enabling us to do our jobs well.



We are rooted in our DEIBJ Values

We use our DEIBJ definitions, mission, vision and values of authenticity, courage, compassion, and community to guide us in all we do. We embed DEIBJ into the structures and systems of UDAR to achieve equitable outcomes that benefit everyone and commit to implementing our DEIBJ strategic framework.



We cultivate inclusive and supportive leadership

Our leaders and managers are held accountable to fostering open and respectful communication where UDAR staff feel safe to provide two-way feedback to help us improve. Leaders and managers commit to supporting employee wellbeing by embracing flexible work arrangements, encouraging work/life balance, and actively promoting career growth for UDAR staff.

Timeline and Context of Recommendations

DEIBJ recommendations were grounded in the Working Group Charge, the Organizational Journey Map, UDAR's DEIBJ Definitions, Mission, Vision and Values, and all information gathered during the assessment phase as represented in the SWOT analysis and in more detailed executive summaries (i.e. UDAR DEIB Culture and Climate Executive Summary April 2021, UDAR Career & Professional Development Executive Summary August 2021).

We recognize that in order to operate by our definitions of diversity, equity, inclusion, belonging and justice and advance toward our vision, we must move at the pace of trust. This has driven our timeline to date and will be what guides us going forward. We will use the Organizational Journey Map, Culture Commitments and UDAR's DEIBJ Definitions, Mission, Vision and Values to guide us in our actions and behaviors.

We see this as a working document that will be updated as we make progress toward our goals. Progress toward our goals will depend in part on the availability of funding and resources.

UDAR DEIBJ Focus Areas

The UDAR DEIBJ strategic framework is divided into 3 focus areas that the UDAR Vice Chancellor identified as the most critical to address. Three separate working groups convened and determined the following outcomes.

Focus Area	Desired Outcomes
Learning and Inclusive Community	<ul style="list-style-type: none"> • UDAR is a psychologically safe, equitable and inclusive community across all units, functions, experiences and identities • UDAR has an extensive library of tools, resources and training that are accessible to all constituent groups across the Berkeley Advancement Community • DEIBJ practices are normalized within the UDAR culture • A transparent, multi-directional internal communication strategy is in place • Decision-making is inclusive and transparent • Employees are offered and engaged in on-going personal DEIBJ learning and development opportunities
Leadership Development and Career Pathways	<ul style="list-style-type: none"> • UDAR culture celebrates professional growth and development • Talent Management and Workforce Planning is a valued strategic partner • A common data set of key HR indicators has been developed and is strategically deployed to increase diversity, equity and inclusion • Recruitment, onboarding and retention practices are standardized and deployed uniformly with transparency, accessibility and accountability • Career development and succession planning processes are aligned with Achieve Together performance management • Safe feedback mechanisms for all staff are in place to promote personal and professional growth
Fundraising Programs and Alumni Engagement	<ul style="list-style-type: none"> • UDAR is in compliance with all UC policies, principles, laws and practices that ensure diversity, equity, inclusion • Volunteer engagement opportunities have been redesigned to include a more diverse base, focus on talent and time vs. treasure, and include robust DEIBJ onboarding and training. • Identity and interest data is fully sourced and used to increase DEIBJ goals • External communications reflect inclusive language, a diverse representation of stories, accessibility, and uses CADS information with cultural sensitivity. • A “diverse pipeline” is clearly defined • Staff have tools, support systems and procedures to use when confronted with challenging DEIBJ-related donor situations

UDAR DEIBJ Strategies

The following 3 strategic objectives represent the ways in which UDAR will actualize its vision to create long-lasting impact. All goals within each focus area support one of these strategic objectives.

Create Structure and Sustainability

The existence of solid structures and systems that support DEIBJ sustainability will move UDAR toward organizational growth and success

Uplift Existing Resources and Practices

Using the collective knowledge of its people and building on current successful practices will strengthen the UDAR community and its programs

Inspire New Approaches and Behaviors

By encouraging creative and bold approaches to problem-solving through a DEIBJ lens, UDAR will exercise more inclusive and equitable behaviors

UDAR DEIBJ Strategic Framework

		Strategies			
		Create Structure and Sustainability	Uplift Existing Resources and Practices	Inspire New Approaches and Behaviors	
Focus Area	Learning and Inclusive Community	a. Establish a structured DEIBJ support system	c. Curate and disseminate DEIBJ resources	d. Enhance psychological safety, belonging and accountability for all team members and the constituents with which we engage	Goals
		b. Normalize DEIBJ principles within our culture through awareness, education, and practice		e. Implement transparent, non-hierarchical, multi-directional communication strategies	
	Leadership Development and Career Pathways	f. Establish more diverse pools of qualified applicants for all roles	h. Build on current hiring and onboarding practices that are standardized, equitable, transparent and welcoming	j. Build a baseline of knowledge, promote professional development and nurture growth mindset	
		g. Create career pathways for all roles and encourage and celebrate ambition	i. Elevate the critical importance of and competency in the managerial skillset	k. Become data-driven in our approach to talent management and workforce planning	
	Fundraising Programs and Alumni Engagement	l. Ensure gift acceptance and Berkeley's Principles of Community are aligned and regularly reviewed	m. Illuminate current practices, policies and laws to ensure compliance	p. Infuse a DEIBJ lens to the Pipeline Health Strategic Plan	
			n. Amplify efforts to source and utilize identity and interest data		
			o. Diversify volunteer base and opportunities for engagement and apply a DEIBJ lens to awards programs		

Challenges

We acknowledge the following challenges and boundaries that UDAR is navigating which include, but are not limited to:

- University infrastructure is hierarchical in nature (e.g., UC system is set up in multi-level job classifications based on career tracks mapping)
- Creating safe feedback mechanisms can be hindered by fear, defensiveness, and resistance and in addition to feedback mechanisms there must also be training to make sure feedback is constructive and not merely unhelpful criticism.
- Re-envisioning volunteer boards and engagement opportunities will require heavy-lifting by UDAR as well as UDAR's campus unit partners to address staff bandwidth, shortage of engagement data in CADS, clarity and reframing around why boards exist and how volunteers are selected.
- Collecting, storing, and using data to measure our DEIBJ efforts is incredibly complicated due to the differences in access to information stored by units other than UDAR and the inherent tension between confidentiality, transparency, and authenticity around such data.
- Manager support and education must navigate bandwidth limitations and shortcomings around content in available trainings.
- The work required and expectations of the DEIBJ FTE position may be overwhelming for a single person and additional work is necessary to create a structure and network that support success for the person who fills this role.

The Process

Implementation Phase
October 2022 – June 2023

Priority Actions

- Hire DEIBJ Leader for UDAR
- TMWP begins roll-out of top priority recommendations related to recruitment, onboarding, training, adaptable management and career pathways
- Design UDAR DEIBJ Strategic Communications Plan
- Individual teams design action plans with DEIBJ lens
- Develop DEIBJ Advisory Council
- Continue offering DEIBJ activities and learning opportunities

*Additional phases will be added as they are defined.

DEIBJ Contributors

DEIBJ Project Team

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*Note that names, titles and units of all DEIBJ and Culture Champion contributors are listed as of October 2022

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