



# SIMON BUSINESS SCHOOL

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## UNIVERSITY *of* ROCHESTER

## Equity, Diversity, and Inclusion Public Action Plan

### Executive Summary

This Public Action Plan for equity, diversity, and inclusion (EDI) is part of a rich institutional history. Over many years, Simon has always strived to strengthen its inclusiveness, with successful initiatives along the way and less successful efforts that require more from us.

**We firmly believe that a diverse, equitable, and inclusive learning environment benefits all members of our community, and we are committed to working toward lasting, systemic change in our efforts to educate the next generation of business leaders. In 2021, US News & World Report recognized Simon's Full-Time MBA as the #1 most diverse Top 50 program, a nod to our commitment to building a welcoming community.**

We strive to foster and cultivate an environment where every member of the Simon community feels supported and valued. True representation only exists when equity and inclusion surround diversity. This includes providing equal opportunity and access to all people, regardless of their gender, race, ethnicity, age, color, sexual orientation, military status, national origin, socioeconomic background, or ability/disability. This supportive environment enables our central mission: academic excellence and student success.

It is with an imperfect history, together with our strong tradition of student activism and striving for being ever better, that we launched a formal EDI action plan for our entire Simon community. We focused on a few key areas, with specific goals, action items, timelines, and Key Performance Indicators (KPIs) to hold ourselves accountable for making progress. This document intends to highlight these areas. It is a community-wide effort, and we are looking forward to your ongoing partnership and collaboration.

### Recruit, Retain, and Develop a Diverse Simon Community: Students, Faculty and Staff

The last four years have shown significant growth in African American, Black, Hispanic American, and Native American matriculated students from 14% to 32% of the total Full-Time MBA incoming cohort. Overall, MBA enrollment was stable or increased slightly – so both the total number and the percentage of historically underrepresented students in Simon's MBA cohorts have increased over this time.

Simon's collaboration with the **Consortium for Graduate Studies in Management** (the Consortium

or CGSM<sup>1</sup>), dates back to the 1960s. The Simon Consortium class has grown significantly over the past five years, with the class of 2022 consisting of 35 students – an enrollment figure that has almost doubled since 2018. A few Simon CGSM students are also admitted to **Management Leadership for Tomorrow** (MLT), a nonprofit organization that provides additional career and professional development to African American, Hispanic American, and Native American students from across the country.

We also have a more than 30-year history of welcoming international students into the Simon community, adding geographic diversity to our already diverse domestic student body. The Full-Time MBA classes of 2021 and 2022 are comprised of 42% women, up from 33% in 2019. Narrowing the gender gap in business education and the global business marketplace will continue to be a key focus area.

Our goal is to continue adopting best practices for recruitment strategies to attract students representing racial and ethnic minorities, women, LGBTQIA-identified people, military, and disabled individuals.

We will also work on building a more diverse faculty and staff. New Simon initiatives include developing pipelines of qualified staff, faculty, and PhD candidates, including programs to ensure success and retention, and most importantly, developing tools and improving recruitment processes.

### Training and Development

Simon stands out as a leader among its peer business school institutions in providing curricular and co-curricular activities that support students fully in their journey to becoming global business leaders. Simon students are socially conscious, and many of these co-curricular programs have been student-suggested or initiated and supported by Simon faculty and staff (e.g. cultural events/celebrations, Fall Ball Fundraiser, Simon Diversity Roundtable, Courageous Conversations). It is also incumbent upon us, as business school administrators, to lead student training and provide opportunities for our staff, faculty, and alumni to develop, build, and support professional development initiatives focused on engagement on topics of diversity, equity, engagement, and inclusion.

### Community and Partnerships

To deliver on our promise of cultivating a diverse and equitable community, we must work closely within our own local Rochester community and with new and existing partners who support our endeavors and share our inclusion and equity vision. For example:

- In 2021 we held the fifth annual Reh Day of Service/Habitat for Humanity Frenzy during MBA Orientation week for the class of 2023 and 2022.
- Through a collaboration with P.I.E.C.E.S and ROC Education Equity Program Simon students work to help close the classroom achievement gaps and create racial equity educational programming for the Rochester City School District.
- The annual Secret Santa community initiative that provides gifts for children and families in the Rochester area during the holiday season.

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<sup>1</sup> The Consortium is an alliance of leading American business schools and some of our country's top corporations. It is dedicated to enhancing diversity in business education and leadership by increasing African-American, Hispanic-American, and Native-American representation in member schools' enrollments and the ranks of management.

- We were the fourth business school to join the Consortium in 1968, and remain dedicated to promoting diversity in management and reflect modern business's multicultural nature.

In addition to our Consortium membership, and our partnership with MLT, we're also proud members of **Prospanica**, whose mission is to increase the number of Hispanic students earning an MBA.

We closely partner with **Forté**, a consortium of major corporations and top business schools dedicated to increasing women's presence in business. We are widely recognized for our commitment to creating opportunities for female leaders to learn and excel within their chosen professions. In 2018, Financial Times lauded Simon and ranked the FT MBA program as:

**No.13**  
for  
**women**  
in the US

**No.1**  
for  
**women**  
in the US in  
pay equity %

**Reaching Out MBA (ROMBA)** is a joint effort between top business schools and Reaching Out to demonstrate that business schools are the primary destination to develop the LGBTQ and active ally business leaders of tomorrow.

For the last 10 years, Simon has been an active member of the **PhD Project**, an organization whose mission is to "increase workplace diversity by increasing the diversity of business school faculty who encourage, mentor, support and enhance the preparation of tomorrow's leaders," and to help students from traditionally underrepresented groups learn about all aspects of a business doctoral program, and encourage them to follow their dream of becoming a scholar. Success in this area has been limited, and we'd like to renew our attention to creating more pipelines for prospective PhD students. To that end, we continue building and developing meaningful partnerships.

- The Simon School has recently partnered with **The Sadie Collective**, an organization founded in 2018 and dedicated to addressing the pipeline and pathway problem for Black women in economics and related fields.
- Another new partnership is with **ASHE: the American Society of Hispanic Economists**, a professional association of economists concerned with the under-representation of Hispanic Americans in the economics profession when Hispanics represent over 16 percent of the United States population.

## Culture

In 2019, the Simon School formally embedded Equity, Diversity, and Inclusion into the School's **Mission, Vision, and Principles** and the School's **Staff Values** to increase awareness and accountability across departments. These values are upheld through formal annual evaluations where staff must demonstrate how they live up to the Simon values. We actively seek out and include

student, faculty, and staff from diverse backgrounds and origins who carry their own unique perspectives. We encourage thoughtful and respectful debate, promoting tolerance and inclusion.

### **Metrics and Reporting**

To hold ourselves accountable for implementing this action plan, we track metrics that represent progress toward our goals. These metrics help guide our decisions in creating a more diverse, equitable, and inclusive school. Our goal is to update the Simon community on our progress twice a year. Major progress will be evaluated and communicated annually. We are pleased to share our first community update with you, recognizing that while we have certainly seen progress and accomplished some key goals, we still have work to do in multiple areas.

### **Simon School EDI Goals**

While we have been ahead of most of our peer business schools in terms of MBA student diversity and length of involvement in organizations supporting members of underrepresented communities, we recognize that this diversity is not reflected at an institutional level and more efforts in a variety of areas, from training to curricular content, to name a few, are needed. We are intentional and thoughtful about creating an institutional infrastructure that emphasizes a culture of equity, diversity, and inclusion to facilitate progress. Our action plan is a part of that infrastructure and describes our commitment to the following five goals and our progress to date.

<b>School Goal #1</b> <b>Build and sustain a culture of inclusion and belonging</b>	
<b>Action Item #1</b>	Transparent communication from the Dean and across Simon Business School departments.
<b>Metrics and Tracking</b>	Annual report on progress against goals and areas for improvement. Quarterly internal management meetings.
<b>Milestone Timing</b>	2021-22 Academic Year
<b>Feb 2022 Update</b>	<p>Over the past year, the Dean has continued to send consistent communications to faculty, students, and staff regarding EDI-related holidays, observances, and events. The Director of EDI and Sr. Assistant Dean of Admissions and Programs continue to meet and collaborate on a regular basis with the Racial Equity Task Force.</p> <p>The Graduate Business Council VP of Diversity, Equity, and Inclusion, and the student-led DEI Center of Excellence Board members, meet regularly with Simon's Director of Equity and Inclusion (who is a member of the National Association of Diversity Officers in Higher Ed). The Director is also a co-advisor and meets regularly with the CGSM Liaison Board, a student team that leads initiatives for all underrepresented students who are members of the Consortium for Graduate Study in Management.</p> <p>The Director and Sr. Assistant Dean have partnered with the Director of Recruitment, the Sr. Director of Alumni Engagement, and the Executive Director of Advancement, in leading and collaborating with the EDI Alumni Council.</p>
<b>Action Item #2</b>	Enrich and expand student training and professional development
<b>Metrics and Tracking</b>	<p>Required orientation EDI programming for all MBA and MS students.</p> <p>Offer optional (encouraged) EDI professional development sessions.</p> <p>Attendance will be tracked, and participant feedback will be collected to assess training quality and impact.</p> <p>Reports will be available every Spring A.</p>
<b>Milestone Timing</b>	2021-22 Academic Year
<b>Feb 2022 Update</b>	<p>In July and August, an increased number of hours of required EDI orientation training sessions were hosted for all Simon MBA and MS students, including:</p> <ul style="list-style-type: none"> <li>• Navigating Difficult Conversations, Andrea Holland (August 2021/October 2021; required for second-year MBA students/15 EMBA students)</li> <li>• Breaking Ice Training (EDI training depicting various lenses and interactions, followed by sessions offered by Simon's Director of Equity and Inclusion that included micro-aggressions, implicit bias, Hofstede cultural dimensions, impact of diversity on communication, and how each of these areas influence student behavior in teams),</li> </ul>

	<p>Pillsbury Theatre Group (July 2021; required for first-year MBA students)</p> <ul style="list-style-type: none"> <li>• Implicit Bias and Microaggressions; Hofstede's cultural dimensions; communication challenges amidst diverse teams; EDI at Simon (expectation setting: zero tolerance for racism/discrimination) (August 2021; required for MS students)</li> <li>• Meaning of Diversity, role of empathy in EDI, allyship, language in EDI, Implicit Bias and Microaggressions, Hofstede's cultural dimensions; communication challenges amidst diverse teams; EDI at Simon (expectation setting: zero tolerance for racism/discrimination) (August 2021; required for PT, EMBA, and MS in Medical Management programs)</li> </ul> <p>Additional programming was held throughout the year, including:</p> <ul style="list-style-type: none"> <li>• Simon Diversity Roundtable Kickoff, led by OEI (October 2021, 38 student attendees)</li> <li>• EDI Executive Chat with Ron Homer ('71S MBA) (November 2021; 124 registered, 35 student attendees)</li> <li>• Simon Diversity Roundtable Meeting, hosted by Simon's Office of Equity and Inclusion (January 2022; 19 student attendees)</li> </ul> <p><u>What's Next</u></p> <p>Simon will host an Intro to Anti-Racism and Equity Training Series with Rachel Vicente. Topics include Intersectionality and Power; Leading with Equity (3-part series); Anti-racism in Institutions (2-part series) (January – April 2022). Note: Training sessions are open to students and staff.</p> <p>Annual EDI Training for Club Leaders (Spring 2022)</p>
<b>Action Item #3</b>	Provide robust, regular training for Simon staff on EDI.
<b>Metrics and Tracking</b>	<p>Identify needs each year and provide offering to address critical areas.</p> <p>Track individual and overall staff attendance.</p> <p>Collect session feedback from staff attendees to assess training quality and impact.</p> <p>Reports will be available every Fall B.</p>
<b>Milestone Timing</b>	2021-22 Academic Year
<b>Feb 2022 Update</b>	<p>78% of staff members participated in the hybrid format half-day training: Breaking Ice Training (November 2021), same content as the student session with a customized staff debrief and working group session led by Simon's Director of Equity and Inclusion. The staff received a post event survey; over 90% of survey respondents found the training session to be helpful.</p> <p><u>What's Next</u></p> <p>See School Goal #1, Action Item #2, <i>What's Next</i> section.</p> <p>Staff are expected to attend a minimum of one program or event during Black History Month.</p>
<b>Action Item #4</b>	Provide robust, regular training for Simon faculty on EDI.

<b>Metrics and Tracking</b>	<p>Identify needs each year and provide offerings to address critical areas.</p> <p>Track individual and overall faculty attendance.</p> <p>Collect session feedback from faculty attendees to assess training quality and impact.</p> <p>Reports will be available every Fall B.</p>
<b>Milestone Timing</b>	2021-22 Academic Year
<b>Feb 2022 Update</b>	<p>48 faculty members participated in half-day training: Breaking Ice (same content as student session with customized debrief and discussion led by the Dean, the Senior Associate Dean for Faculty and Research, and the MBA Faculty Director, in partnership with the Director of Equity and Inclusion, on Managing Classroom Discussions regarding EDI-related Topics) (December 2021). Faculty were engaged throughout both sessions and found the trainings to be helpful.</p> <p>Additionally, Simon sponsored two academic conferences that brought together scholars from multiple institutions to present cutting-edge research on:</p> <ul style="list-style-type: none"> <li>• Racial Justice and Education, Bradley Policy Center at the University of Rochester (October 2021)</li> <li>• Public Policy, with a focus on economic mobility, Carnegie-Rochester-NYU, (November 2021)</li> </ul> <p><u>What's Next</u></p> <p>4 Simon faculty champions are participating in the University's inaugural cohort of ACUE faculty training in Spring 2022.</p> <p>Continued faculty discussions and educational opportunities on integrating EDI into courses and managing diverse and inclusive classrooms.</p> <p>Planning faculty EDI training for AY 2022-23.</p>
<b>Action Item #5</b>	Include EDI values in Simon staff annual performance reviews.
<b>Metrics and Tracking</b>	<p>Include EDI values-related content in Simon staff performance reviews.</p> <p>Reports will be available every Spring B.</p>
<b>Milestone Timing</b>	2020-21 Academic Year
<b>Feb 2022 Update</b>	<p>Simon's annual staff performance review was modified to include a section - through self-assessment and manager review - on how the employee is living EDI values in their daily professional lives.</p> <p><u>What's Next</u></p> <p>Implementing for Spring 2022 annual review cycle.</p>

## School Goal #2

### Recruit and sustain a diverse student body

<b>Action Item #1</b>	Sustain application volume and enrollment of diverse candidates in the Full-Time MBA program.
<b>Metrics and Tracking</b>	Track application volume levels annually, admission offers, and enrollments. Reports will be available annually.
<b>Milestone Timing</b>	2020-21 Academic Year
<b>Feb 2022 Update</b>	<p>We have added an EDI-related essay question to the admission application.</p> <p>There is an option (not required) to include personal pronouns in the admission application for those entering in 2022.</p> <p>In 2021, 41% of the enrolled FT MBA student population was female; in 2019 and 2020, the female student population was 42%.</p> <p>In 2021, 34% of the enrolled student population was underrepresented minority (Hispanic American, African American, and Native American students, as a percentage of U.S. domestic students); the underrepresented minority student population was 46% in 2020, and 40% in 2019.</p> <p>FT MBA enrollments for historically underrepresented candidates as a percentage of domestic students, as well as the overall number of students, was lower in 2021 than 2020. Despite making admission offers to a slightly larger number of Black, African American, Hispanic American, and Native American candidates in 2021, yield decreased compared to 2020 levels, which were historically high. Following a highlight on social justice issues in the U.S. in summer 2020, a growing number of business schools ramped up diversity recruiting; growing competition was a contributing factor to our results. Additionally, University of Rochester COVID constraints restricted on-campus visitors and recruiting events (e.g., Diversity and Women's Conferences), which ultimately limited our ability to engage and "sell" the culture and unique strengths of Simon to candidates who often had multiple admission offers.</p> <p><u>What's Next</u></p> <p>Looking ahead to 2022, some recruiting events returned to campus-based programs, including our 2021 Diversity and Women's Conferences, which favorably positions us compared to peer schools who are recruiting in a mostly virtual format.</p> <p>We also recently designated 3 people on the Full-Time Admissions team who are working on a year-round recruiting team that will focus on building relationships and encouraging candidates to apply, while also focusing on diversity within the prospect and applicant pool.</p>



<b>Action Item #2</b>	Promote increased diversity in the Full-Time MS and Part-Time MBA Program.
<b>Metrics and Tracking</b>	<p>Track application volumes, admission offers, and enrollments from underrepresented and female populations.</p> <p>Track number of countries represented in the Full-Time MS programs.</p> <p>Reports will be available annually.</p>
<b>Milestone Timing</b>	2022-23 Academic Year
<b>Feb 2022 Update</b>	<p>Simon FT M.S. programs have historically attracted a high interest from international candidates. Over the past years, we have focused recruiting efforts to increase the breadth of countries and nationalities represented.</p> <p>MSA: 3 countries were represented in 2019; this has increased to 7 countries in 2021.</p> <p>MSF: 8 countries were represented in 2019; this has increased to 20 countries in 2021.</p> <p>MSBA: 10 countries were represented in 2019; this has increased to 12 countries in 2021.</p> <p>MSMA: 5 countries were represented in 2019; this has increased to 10 countries in 2021.</p> <p>PT MBA: From Fall 2019 - Spring 2022, 8.6% of the enrolled student population was underrepresented minority (Hispanic American, African American, and Native American students, as a percentage of U.S. domestic students), and 47% of the enrolled student population was female.</p> <p><u>What's Next</u></p> <p>Simon is in the process of revamping the Part-Time and EMBA programs to allow for growth, diversity, and flexibility suitable for an evolving, modern business school. We piloted hosting an MS experiential learning case competition with Simon scholarships and a paid visit to the Simon campus as the prize. This initiative was specifically designated to diversify the applicant pool. 20 candidates competed with 9 selected as finalists.</p>
<b>Action Item #3</b>	Plan, Execute and Participate in DEI-related career and admissions recruiting conferences.
<b>Metrics and Tracking</b>	<p>Participate in conference and recruiting events of partners.</p> <p>Plan and execute school-wide Diversity and Women's conference events.</p> <p>Track number of conferences and student attendance levels (when possible).</p> <p>Gather input from conference attendees via a post-event survey (when possible).</p> <p>Reports will be available every Spring B.</p>
<b>Milestone Timing</b>	2021-22 Academic Year

<b>Feb 2022 Update</b>	<p>Participated in virtual recruiting events for 2021-2022 (Consortium, Forté, ROMBA, and MLT). 22 prospective students attended the in-person Diversity Conference. 114 prospective students registered for (and between 20-35 attended) virtual sessions. 65 current students, staff, and alumni attended in-person Diversity Conference sessions.</p> <p>31 prospective students attended the in-person Women's Conference. An additional 71 prospective students registered (and 8-10 attended) each virtual session. 60 current students, staff, and alumni attended the in-person Women's Conference sessions.</p> <p>63 Simon students participated in the virtual Prospanica Conference and Career Expo (September 2021).</p> <p>72 Simon students participated in the National Black MBA Association Conference and Career Expo in Chicago, IL (September 2021). Attendees were surveyed post-conference:</p> <ul style="list-style-type: none"> <li>• 32% of students were contacted prior to the conference and received job or internship interview invitations.</li> <li>• 40% met with 10 or more sponsoring organizations while on site.</li> <li>• 27% received job or internship interviews on site.</li> <li>• 40% received job or internship interviews post conference.</li> <li>• 3% received job or internship offers.</li> <li>• 30% pending job or internship offer decisions.</li> </ul>
<b>Action Item #4</b>	Increase scholarship support for diverse student enrollments.
<b>Metrics and Tracking</b>	<p>Track the amount of funding raised annually for scholarship opportunities.</p> <p>Track the number of students supported.</p> <p>Track the number of alumni who provide funding toward these scholarships.</p> <p>Reports will be available annually.</p>
<b>Milestone Timing</b>	2022-23 Academic Year
<b>Feb 2022 Update</b>	<p>Alumni giving to the Consortium Scholarship Fund increased significantly by 421%.</p> <ul style="list-style-type: none"> <li>• Between FY21 and FY20, funding raised increased by 421%, and the number of gifts increased by 144%.</li> </ul> <p><i>*Data as of November 15, 2021.</i></p> <p>A new \$100K endowed scholarship benefiting Consortium students was established in February 2020.</p> <p>Alumni giving to Simon Women's Alliance Scholarship also increased.</p> <p>The scholarship supports 2 female MBA students annually.</p> <ul style="list-style-type: none"> <li>• Between FY21 and FY20, funding raised increased by 47.7%, and number of gifts increased by 20.7%.</li> </ul> <p><i>*Data as of November 15, 2021.</i></p> <p><u>What's Next</u></p>

	Our early efforts in increasing our scholarship support are promising; we are hoping to build on this and will continue the funding drive.
<b>Action Item #5</b>	Draw national attention to Simon diversity initiatives.
<b>Metrics and Tracking</b>	Develop and publish EDI business case narrative. Track engagement; digital marketing metrics; press.
<b>Milestone Timing</b>	AY2021-22 Academic Year
<b>Feb 2022 Update</b>	<p>In 2021, US News and World Report named Simon the MOST diverse (#1) among the full-time MBA programs ranked within the top-50. Simon has developed 3 case studies about EDI; key audiences included: corporate recruiters, peer deans, and prospective students.</p> <p>Simon launched Simon Connects: EDI Roadmap Series, a suite of industry-focused panel discussions focusing on our EDI-related work. Attendees learned effective strategies to foster EDI in their own industries. 3 events have been hosted to date (on consulting, financial services, and technology and media), with additional events being scheduled. Attendees included alumni, recruiters, and current students (115 unique attendees, 211 unique registrants). Our LinkedIn InMail campaign targets corporate recruiters (the reach is over 9,000) and peer deans (the reach is over 12,000).</p> <p><u>What's Next</u> Simon is planning an EDI-focused webinar; this will be a panel discussion with the Dean, co-hosted by the Consortium.</p>
<b>Action Item #6</b>	Continue to grow applications, enrollment, and graduation of diverse candidates in the Simon PhD program.
<b>Metrics and Tracking</b>	Identify new markets for applicants through digital marketing campaigns. Track application volume levels annually, admission offers, and enrollments. Expand school relationships and direct faculty and administrator connections to institutions with diverse populations to develop a pipeline of PhD candidates. Reports will be available annually.
<b>Milestone Timing</b>	2021-22 Academic Year
<b>Feb 2022 Update</b>	<p>We are proud members of The PhD Project. Each fall, the Simon PhD Program Director and/or Simon Senior Associate Dean of Faculty attends the annual PhD Project Conference to network with prospective PhD applicants.</p> <p><u>What's Next</u></p>

	<p>In fall 2022, we will be sending a targeted email campaign to faculty and/or administrators at Historically Black Colleges and Universities to promote our PhD program.</p> <p>DocNet, an organization which promotes doctoral education in business throughout the world, has organized an in-person PhD information event at Spelman College, to include recruiting with other Historically Black College and Universities. The Simon PhD Program Director plans to attend the 2022 DocNet Information Sessions at Spelman College. (This event was initially scheduled for 2020 but was postponed due to COVID.)</p> <p>We have had exploratory conversations with Howard University about opportunities for collaboration during the admissions process.</p>
<b>School Goal #3</b> <b>Increase EDI content in curricula and co-curricular programming</b>	
<b>Action Item #1</b>	Increase EDI content in curricula (case discussions, guest speakers, and course content)
<b>Metrics and Tracking</b>	<p>Increase cases and guest speakers in MBA core classes that will focus on EDI content.</p> <p>Offer one full elective course that offers EDI content.</p> <p>Refer faculty to EDI case bank and offer guest speaker list identification.</p> <p>Develop broader EDI curriculum measures and content support</p> <p>Reports will be available annually.</p>
<b>Milestone Timing</b>	2021-22 Academic Year
<b>Feb 2022 Update</b>	<p>We exceeded our goal of underrepresented minority guest speakers in core courses; all guest speakers (6 total) were diverse or related to diverse topics. Sample topics include a panel discussion about women and diversity (led by women), as well as a marketing discussion with Salim Holder ('07S MBA; CEO of 4th Ave Market, an online store for Black hair and skincare products), which included discussion around marketing initiatives and reinvestments into the Black community.</p> <p>We now offer a one-credit elective course: GBA 443: Diversity, Equity, and Inclusion in Business. This course uses a blend of class discussions, case studies, and lectures to explore ways to make business more inclusive and equitable.</p> <p>Last year, the MBA core curriculum included 10.25 EDI-focused content hours.</p> <p><u>What's Next</u></p> <p>To support an increase in cases, we have circulated to faculty repositories of case studies that offer EDI content; faculty are also working to create new cases with EDI-focused content (one has recently been developed).</p> <p>Spring will broaden data collection on EDI in curriculum to MBA electives.</p>
<b>Action Item #2</b>	Offer experiential learning opportunities and case writing focused on systematically excluded and women-led projects.

<b>Metrics and Tracking</b>	<p>Offer 3 case competitions (including a competition hosted by Simon).</p> <p>Track number of student participants.</p> <p>Reports will be available annually.</p>
<b>Milestone Timing</b>	2021-22 Academic Year
<b>Feb 2022 Update</b>	<p>4 new EDI-focused case competitions were introduced, for MS and MBA students.</p> <ul style="list-style-type: none"> <li>• The MS case competition focused on the equity of paying for loot boxes for video game advancement within the diverse community of gaming customers (34 prospective MS students).</li> <li>• 3 case competitions for Decision Day; students were asked to deliver solutions using EDI impacts as an ongoing success measure (110 MBA students).</li> </ul> <p>We have also partnered with 2 clubs in creating cases and case competitions that - as one of the judged business criteria - focus the students on evaluating inclusivity and equity issues for a diverse community.</p> <p>Simon students also participated in the following case competitions:</p> <ul style="list-style-type: none"> <li>• National Black MBA Conference: 1 team of 3 + an alternate entered. We placed in the top 6 teams at the event.</li> <li>• Howard University conference: 2 teams of 3 entered. One of our teams won the event!</li> <li>• Katz Case Competition: 1 team of 4 students entered in the competition. The 2021 case challenged participating teams to develop a strategic plan to address a company's current efforts in diversity, equity, and inclusion space related to elevating workforce diversity.</li> <li>• John R. Lewis Racial Equity Case Competition: 2 teams competed in this competition.</li> </ul> <p><u>What's Next</u></p> <p>In fall 2022, a new case competition – for Forté schools – will be launched, focusing on women who have shaped the world.</p> <p>2 cases written by Kate Washington ('04S MBA) will be used in class and internal case competitions. Topics include launching a company in an international location (and evaluating the intersection of culture, religion, and business), as well as engaging with a company offering cultural products associated with healing.</p>
<b>Action Item #3</b>	Offer programming that enhances cultural competencies and awareness.
<b>Metrics and Tracking</b>	<p>Partner with student leadership organizations to coordinate EDI offerings.</p> <p>Track student and alumni participation and collect post-event feedback (when possible)</p> <p>Reports will be available annually.</p>
<b>Milestone Timing</b>	2021-22 Academic Year
<b>Feb 2022 Update</b>	<p><u>August 2021</u></p> <ul style="list-style-type: none"> <li>• Latin American Students of Simon (LASOS), Simon Spectrum, and the Simon Black Student Alliance (SBSA) collaborated on a picnic event representing different cultures at Simon (72 students attended)</li> </ul>

- The SBSA held a special trivia event for our Black student community (12 students attended)
- Asians in America (AsIAM) held a karaoke and food tasting program to showcase Asian cultures (58 students attended)

#### September 2021

- EDI and the Social Club Expo showcased our EDI clubs, as well as the valuable programming and leadership opportunities (over 200 students attended)
- AsIAM Mid-Autumn Festival (32 students attended)
- Simon Women in Business: a summit/retreat for our women students and men as allies (over 50 students attended)

#### October 2021

- Simon's Office of Equity and Inclusion: Inclusive Cafecito to spotlight Hispanic and Caribbean American cultures
- AsIAM: sushi and sake mixer to showcase Asian culture in a fun, inclusive way (58 students attended)
- The DEI Center of Excellence organized a tour and field trip to Ganondagan State Historic Site to showcase Native American culture and history in the upstate NY region. (10 student attendees)

#### November 2021

- ASIAM, the Graduate Business Council, the Master's Advisory Council and Office of Student Engagement: Simon Diwali Celebration, Indian Festival (184 student attendees)
- Simon Africa Business Club Fall Gathering with authentic African food and beverage, music, and bringing together our African student community and all of Simon (24 students attended)
- Simon Women in Business and Forté: Men as Allies event (45 attendees)

#### January 2022

- Martin Luther King, Jr. Celebration hosted by Simon's Office of Equity and Inclusion (Virtual) (58 student and staff attendees)

For student trainings: please see School Goal #1, Action Item #2.

#### What's Next

Simon's DEI Center of Excellence will host Courageous Conversations, a panel discussion focused on protecting the Black community and all its intersections (February 2022)  
Office of Equity and Inclusion (partnering with SBSA): Dr. David Paul (Neurosurgeon, Simon MS alum and Social Entrepreneur); Dr. Paul launched Bold and Gritty, a Black-owned coffee-focused lifestyle brand; the brand focuses on changing the Black male narrative and highlighting successful Black men (February 2022).

## Recruit and retain faculty and staff from traditionally underrepresented communities

<b>Action Item #1</b>	Increase diversity among faculty
<b>Metrics and Tracking</b>	<p>Improve recruiting practices to ensure reaching available diverse candidates.</p> <p>Identify new pipelines for hiring, and track hiring processes, including training on inclusive hiring practices.</p> <p>Track number of applications, interviews, offers, and hires with underrepresented minority community members.</p> <p>Develop clinical faculty pipeline through adjunct and/or alumni guest lecturers.</p> <p>Reports will be available annually.</p>
<b>Milestone Timing</b>	Beyond 2023-24 Academic Year
<b>Feb 2022 Update</b>	<p>Relative to 2017, tenure-track faculty from underrepresented groups increased from 0 to 3% and non-tenure-track faculty from 2 to 9%.</p> <p>Relative to 2017, female tenure-track faculty increased from 16 to 22% and non-tenure-track faculty from 24 to 25%.</p> <p>Of experiential facilitators, 20% hired in 2021 were from underrepresented groups.</p> <p>All job postings for tenure-track (and other) faculty positions are reviewed by the University of Rochester's Office of Equity and Inclusion.</p> <p><u>What's Next</u></p> <p>We are developing a faculty, staff, and student demographic dashboard. We plan for this to be published on Simon's website in 2022.</p> <p>Efforts to hire a full-time underrepresented minority clinical faculty member.</p>
<b>Action Item #2</b>	Increase the percentage of staff who are members of underrepresented groups, with a particular emphasis on positions Grade 52 and above through hiring and promotion.
<b>Metrics and Tracking</b>	<p>Expand awareness and build relationships with potential diverse candidates.</p> <p>Track number of pre-meetings with potential diverse candidates, as well as the number of interviews.</p> <p>Track number of offers and related hiring statistics for each open position, as well as annual results.</p> <p>Reports will be available annually</p>
<b>Milestone Timing</b>	Beyond 2023-24 Academic Year
<b>Feb 2022 Update</b>	<p>Relative to 2017, the percentage of staff from underrepresented groups increased from 9 to 13%.</p> <p>Simon's Office of Human Resources, in partnership with the Director of Equity and Inclusion, created an Inclusive Hiring Guide for staff, to implement practices at each step of the hiring process.</p>

	<p>All jobs posted in our Human Resource Management System are now indexed to the following job distribution platforms: Direct Employers (this goes to hundreds of national job boards); Indeed.com; Google for Jobs; Hispanic and Latino Professionals Association.</p> <p>We have begun to use the job board: HigherEdJobs and upgraded our postings to include the Diversity and Inclusion badge and email.</p> <p>Simon's Director of Equity and Inclusion is exploring institutional access to HBCUConnect, as an additional resource for diverse hiring.</p> <p>We have a partnership with University of Rochester Human Resources when a diverse pool is not identified through Simon's pipeline.</p>
<b>School Goal #5</b> <b>Make a positive impact in the Rochester community</b>	
<b>Action Item #1</b>	Partner with wellness and external organizations to create inclusive, accessible wellness opportunities for all students.
<b>Metrics and Tracking</b>	Create at least one new partnership with outside wellness firm. Track increase in student involvement in each activity.
<b>Milestone Timing</b>	2021-22 Academic Year
<b>Feb 2022 Update</b>	<p>Partnered with the University of Rochester's Director of Culturally Reflective Management on Wellness Wednesday Programming.</p> <p><u>What's Next</u> Partner with the new VP of Wellness role, in the new Graduate Business Council Board, in the upcoming year.</p>
<b>Action Item #2</b>	Continue with pro-bono student consulting practice to support local minority, Black, and women-owned businesses.
<b>Metrics and Tracking</b>	Continue to grow the number of Simon Vision Consulting - an initiative to build relationships between Simon's graduate students and Rochester's professional community - projects, focused on consulting to underrepresented, Black, and women-owned businesses.
<b>Milestone Timing</b>	2021-22 Academic Year
<b>Feb 2022 Update</b>	Over fall 2021, Vision Consulting engaged with 13 projects. 5 projects involved businesses owned by underrepresented minorities; 5 projects were sponsored by women. 9 of the projects will impact a diverse community.
<b>Action Item #3</b>	Continue partnership with Habitat for Humanity.
<b>Metrics and Tracking</b>	Engage and involve members from all parts of the Simon Community. Track participation and attendance levels.



<b>Milestone Timing</b>	2021-22 Academic Year
<b>Feb 2022 Update</b>	<p>We have expanded the Habitat for Humanity program to include a historical overview of the program by the organization, a consultant-led session on redlining in Rochester, as well as a class discussion on global redlining led by Simon's Director of Equity and Inclusion. Programming is mandatory for the incoming MBA Class of 2023 and the MBA Class of 2022 (the program was offered for students who were unable to participate the previous year due to COVID).</p>
<b>Action Item #4</b>	Create school-wide opportunities for growth and service by leveraging student and alumni networks.
<b>Metrics and Tracking</b>	<p>Build volunteer opportunity pipelines, and network with Rochester-based business organizations which serve women, minority-owned businesses and/or urban redevelopment. Track number of projects and participation rates. Reports will be available annually.</p>
<b>Milestone Timing</b>	2021-22 Academic Year
<b>Feb 2022 Update</b>	<p>During re-orientation programming, Simon Women in Business and Forté hosted a clothing swap; clothes were donated to Dress for Success (a nonprofit organization that empowers women and provides professional attire).</p> <p>Project-based learning, Innovation, Exploration, Critical Thinking, Equity, Social Justice (P.I.E.C.E.S) and ROC Education Equity Program strive to close classroom achievement gaps and create racial equity educational programming for the Rochester City School District. Simon coordinates a call for volunteers, as well as the P.I.E.C.E.S teaching schedule. We currently have 25 - 30 student volunteer participants. We work with 3 classrooms in the district; the curriculum focuses on growth mindset, personal finance, and entrepreneurship.</p> <p>In October 2021, the Simon Volunteers Fall Ball Fundraiser had 300 attendees, and through Silent and Live Auction set fundraising records for Secret Santa (\$15k) providing for Rochester families and children in need.</p> <p><u>What's Next</u></p> <p>A Students of Color Caucus is being organized by the Director of Culturally Reflective Management, the Office of Student Engagement's Director of Student Life, and the Minority Male Leadership Association at the University of Rochester (a student-led organization that gathers driven and passionate students and faculty to provide mentorship to underrepresented minorities in the city of Rochester).</p> <p>Recruiting for staff and faculty P.I.E.C.E.S and ROC Education Equity Program volunteers.</p>

## Process

As we embarked on documenting the Simon EDI Action Plan, we collaborated and closely aligned with the University of Rochester's plan. Dean Yeltekin formed the Staff and Faculty Racial Equity Task Force, and student leaders organized a student-led Racial Equity Task Force to partner with the Simon administration. Since July 2020, we also launched an Equity, Diversity, and Inclusion Alumni Council comprised of dedicated alumni, provided SWOT analyses, identified needs, and provided feedback.

We solicited and collected feedback compiled from hours of meetings with stakeholders, evaluated best practices from other graduate schools at the University and corporations. Feedback was disseminated into an internal first draft submitted to the University in November 2020.

This document will be available on our website, updated at least annually with progress against goals and other priorities. Thank you to our wonderful community for working to create an equitable, diverse and inclusive environment for everyone.

**Update for 2021:** working with our initial EDI Action Plan, the school's administrative and academic leadership created a master spreadsheet to record, track and monitor progress toward goals. Over the course of the Fall semester, we have been updating this community report to ensure it is current and we meet our stated goals. We will distribute another community update in the June/July timeframe with annual updates to follow.

**Thank you to our students, faculty, and staff for your partnership.**

## APPENDIX:

\* Breaking Ice is an award-winning program of Pillsbury House Theatre that addresses courageous and productive dialogue around issues of diversity, equity and inclusion in the workplace. "Breaking Ice performances blend drama, music, poetry, movement and humor in a series of dynamic scenes to explore how systemic inequities, implicit bias and common misperceptions show up in relationships, creating uncomfortable interactions that inhibit innovation, motivation and productivity in the workplace." Following the performance, trained facilitators led Simon staff in a reflective discussion to deepen awareness and practice.

\*\*The CRNYU conferences seek to stimulate policy relevance and empirical research in economic science, to encourage interchange of scientific ideas among analysts with different approaches, and to generate greater understanding by academic economists of practitioners' environments. Removing impediments to economic mobility and ensuring fair access to economic opportunities is a central concern for citizens and policymakers. This conference