



ACTIVATING INCLUSION TOOLKIT

Equity, diversity and inclusion self-assessment tool Getting started guide

Version: May 2023

Self-reported feelings of acceptance and sense of belonging amongst students, faculty and staff in relation to comparator groups

FACULTY & STAFF @ UBCV and UBCO

Self-reported feelings of acceptance in the workplace, in relation to comparator group.



STUDENTS @ UBCV & UBCO

Self-reported sense of belonging in relation to comparator group.



Indicators of "inclusion", what
people's experience of

Contents

OVERVIEW	3
EDI SAT overview	3
Elements that support successful engagement with the EDI SAT	3
FOR EDI SAT LEADS	3
Role of the EDI SAT Lead(s)	4
Who should be involved in using the EDI SAT?	4
What process should we use to work with the EDI SAT?	6
Pitfalls to avoid	7
RESPONSIBILITIES OF THE FACILITATORS INCLUDE:	8
Building trust as a facilitator	8
Things to consider	9
What happens after the EDI SAT?	10
REFERENCES	11

Overview

This guide is designed for leaders and others in units and departments that are engaging with the EDI SAT. It provides information to help ensure a successful engagement with the EDI SAT, including supplemental information about the tool, as well as considerations for planning how your unit will engage.

EDI SAT overview

The EDI SAT is a tool that helps UBC units and academic departments better understand how their work is advancing equity, diversity and inclusion (EDI) at UBC and better identify areas of opportunity or growth within their units and departments.

There are two versions of the tool: one for academic units and one for administrative units. Many units and departments at UBC serve both administrative and academic functions; your department should choose whichever version of the tool or sections of the tool are most appropriate.

Elements that support successful engagement with the EDI SAT

A department's successful engagement with the EDI SAT relies on the following elements:

- **Shared interest in learning:** A team involved in the self-assessment process that is knowledgeable about the department, is motivated to learn and grow together, and has the individual capacity to fully participate (i.e. time, resources, openness).
- **Defined time frame:** A clearly described process that dedicates sufficient time to collectively engage with the self-assessment in a thorough and thoughtful manner.
- **Lead or Champion:** Someone responsible for managing the process and timeline – ensuring that participants do what they need to do within the agreed-upon time frame. It is helpful if this individual has knowledge, experience and is comfortable leading EDI work.
- **Collective meaning-making:** Time for the department to discuss and jointly make meaning of the collected reflections about the department.
- **Decisions that lead to action:** Leadership for implementing any changes within a defined time period; allocation of resources needed to make the desired changes (e.g. staff, budget, EIO support).

For EDI SAT Leads

Role of the EDI SAT Lead(s)

Each unit/department will need an identifiable person or group who is championing the unit's engagement with the EDI SAT, as well as determining what the engagement process will look like. The role of EDI SAT leads or champions may be split among multiple people depending on what works best for your unit/department.

- Communicates the reason for deciding to engage with the EDI SAT and the appetite for taking action as a result of using the EDI SAT
- Considers advantages and disadvantages of different methods of engaging with the tool and decides the approach that the unit will use (see below)
- Carries out or delegates logistical tasks for tool implementation such as booking meetings and sending reminder emails
- Ensures appropriate follow up with the results of the EDI SAT, for example creating an action plan, list of recommendations, or summary report (additional tools are available if needed).

Who should be involved in using the EDI SAT?

Key questions to ask within the unit to determine who should be involved in using the tool include:

- Who in the unit has been involved in prior reviews and assessments of the unit (whether about equity, diversity, and inclusion issues or not)?
- Who in the unit has an understanding of the unit's processes and practices regarding the topics covered by the tool?
- Who in the unit has a strong understanding of equity, diversity, and inclusion?

You will probably have an instinct about which groups within the unit/department to engage. Consider that in conjunction with the advantages and disadvantages below. Keep in mind that you can engage different groups either together or separately depending on what you feel will work best.

Group	Advantages	Disadvantage
Senior managers or similar	<ul style="list-style-type: none"> Probably have a good understanding of policies, and practices of their respective units 	<ul style="list-style-type: none"> May not have insight into how people with less power/status within the organization experience things
Equity committee or similar	<ul style="list-style-type: none"> Good understanding of issues of equity Probably already broadly represents relevant 'constituencies' within the unit 	<ul style="list-style-type: none"> May silo this work to something the equity committee is responsible for
Committee with representatives from each team	<ul style="list-style-type: none"> Can bring understanding of policies and practices of their respective units 	<ul style="list-style-type: none"> Setting up a new committee could be cumbersome How to select who would sit on the committee?
Each team within the unit	<ul style="list-style-type: none"> Teams have a strong basis of understanding of their own work – can support robust discussion 	<ul style="list-style-type: none"> Teams may feel “compared” to other teams Process may be affected by internal team dynamics
Everyone in the unit	<ul style="list-style-type: none"> Builds shared sense of ownership More well-rounded information/perspective 	<ul style="list-style-type: none"> May slow things down May be difficult with varying levels of experience and understanding of equity, diversity, and inclusion Resource-intensive both to facilitate processes for the whole unit and for individual staff to take time to work with the tool

Group	Advantages	Disadvantage
<p>Students / “clients” of the unit</p>	<ul style="list-style-type: none"> ▪ Understand how the unit is experienced from the perspective of those it “serves” 	<ul style="list-style-type: none"> ▪ May not have complete information on internal policies/practices of the unit

What process should we use to work with the EDI SAT?

Key questions to ask within the unit to determine what process would be best within your unit include:

- How does the unit normally like to work together? (e.g., facilitated exercises vs. standard meetings)
- How can we ensure that anyone engaged with the EDI SAT is able to contribute meaningfully (rather than just to say that they have been engaged?)
- What are the implications on time commitment from participants of the processes we are considering?

Again, keep in mind that you could use different processes with different groups within the unit/department, and you can use more than one of the suggested processes below, or develop a new process that will better suit your unit.

Format	Pros	Cons
<p>Discuss each statement as a group/committee</p>	<ul style="list-style-type: none"> ▪ Familiar format may increase participants’ comfort 	<ul style="list-style-type: none"> ▪ Some participants may prefer to have more time for reflection or to express their opinions in a less public way

Format	Pros	Cons
Facilitated activity (dotmocracy, soft shoe shuffle, etc.)	<ul style="list-style-type: none"> ▪ More interactive ▪ Enable more people to share their opinion on a statement 	<ul style="list-style-type: none"> ▪ Some participants may prefer to have more time for reflection or to express their opinions in a less public way ▪ May be more time-consuming than a traditional discussion format
Online “survey”	<ul style="list-style-type: none"> ▪ Enables participation of everyone ▪ Allows for anonymity 	<ul style="list-style-type: none"> ▪ Misses out on the learning potential of discussion and interaction ▪ Requires time and resources for data processing
Different teams/committees to look at different sections	<ul style="list-style-type: none"> ▪ Spreads the workload over multiple groups ▪ Ensures people with expertise in each section are involved 	<ul style="list-style-type: none"> ▪ May miss out on holistic understanding of the unit

Pitfalls to avoid

When designing the process for engaging with the EDI SAT, here are some common pitfalls to avoid:

Pitfall	Reason
Positioning the EDI SAT as an all-encompassing tool	The EDI SAT only captures one aspect of a unit’s work – its practices and processes. Other methods are better suited for gathering information about outcomes for students, faculty, and/or staff.
Using the EDI SAT to resolve major conflicts within the unit	The EDI SAT works best within an atmosphere of trust, openness and collaboration. While no workplace or group is without some degree of conflict, acute or longstanding conflict may detract from the ability of the group to reflect and learn collectively.
Using the EDI SAT for comparison or judgement against an EDI “standard”	The EDI SAT is not meant to be used to compare between units or against an objective standard. It does not uncover an objective “true” rating but rather supports dialogue and reflection.
Ignoring power dynamics in using the EDI SAT	Consider power dynamics,

Responsibilities of the facilitators include:

- Create the space for units/departments to have open and honest conversations
- Help guide the discussion towards ideas and potential actions that could be taken to advance equity, diversity, and inclusion within the unit
- Capture the notes, particularly ideas for action, to support action planning or implementation of the ideas generated

Building trust as a facilitator

As the facilitator of the tool you will be asked to lead a process that can often require having difficult and honest conversations. Building trust with the tool users

is vital for having open discussions that uncover as much knowledge as possible. Planning for how you will build a trusting environment should start early in the engagement process and remain a consideration throughout the process. On page 10, we list Covey's (2006) Tenants of Trust along with suggestions of how to apply the Tenants in the context of the EDI SAT.

Things to consider

In the appendix of the EDI SAT, you will find a list of "things to consider" for each topic statement, which indicates particular practices that might be relevant to the statement. These may be helpful when doing a "deep dive" into a particular area of practice, or if a group is unsure what is meant by a particular statement.

The list is a generic set of practices, policies, etc. that may need to be translated to the context of your unit/department. It is important to note that although the Things to Consider often emphasize formal policies and structures, inclusive practices can just as often be informal and this should be reflected in the unit's self-assessment.

Tenants of trust

Integrity: Keep commitments to yourself, have the courage to stand for something and the humility to be open.

- Keep to agreed-upon timings and timelines, or be transparent when they need to be adjusted
- Share your own experiences of learning about equity, diversity, and inclusion and that no one is "perfect" when it comes to practices of equity, diversity, and inclusion
- Show appreciation when people do share and are open

Intent: Your motive, agenda and behaviour should show your good intent.

- Be clear about the goals of your engagement with the EDI SAT and how results of the EDI SAT will serve the unit/department
- Clearly communicate the EDI SAT as a tool for reflection and learning, not accountability or adjudication of conflict

Tenants of trust

Capabilities: Work from your areas of strength while continuing to be a learner.

- Relay the importance of everyone's perspectives (you may not have deep knowledge of all functions of the unit/department)
- Pull in a subject matter expert to consult with if needed; reach out to campus partners for questions

Results: Your credibility comes from your past, present and expected future performance.

- Acknowledge past work on equity, diversity, and inclusion in the unit and how it was received

What happens after the EDI SAT?

After working through the topic statements in the EDI SAT, two sections of the tool will help your unit/department summarize reflections and learnings from the tool - the Reflection Questions and Action Ideas. These worksheets allow you to identify potential actions your unit/department could take to advance equity, diversity, and inclusion within your area of work. Depending on your local context you may want to incorporate these ideas into a strategic plan, create a separate Inclusion Action Plan for your unit, or choose a few key actions to tackle first.

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