



## ACTIVATING INCLUSION TOOLKIT

# Setting Your Inclusion Action Agenda

The purpose of this tool is to support individuals or groups with leadership or authority to influence how their unit (faculty, division, department or unit) engages with UBC's Inclusion Action Plan. After using this tool, leaders will have identified a list of actions that they could take to advance inclusion at UBC.

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Version: July 2020

## Overview

In 2018, the University of British Columbia developed [Shaping UBC's Next Century: 2018-2028 Strategic Plan](#) and named inclusion one of three overarching themes for the university. To operationalize the inclusion theme, UBC developed [Building Inclusive UBC: An Inclusion Action Plan](#) (IAP). The IAP contains thirty-six actions organized under five goals: Recruitment, Retention, and Success; Systems Change; Capacity Building; Learning, Research, and Engagement; and Accountability.

A core purpose of the IAP is to provide a framework through which academic departments and operational units across UBC can incorporate inclusive actions into their unit-level planning. Every unit can take actions that will contribute to the success of the IAP, and inclusion at UBC more broadly. At the same time, no one unit is expected to undertake all of the actions in the IAP.

This tool provides a structure for your unit to review the IAP, identify goals and actions of relevance to your unit, and assess how you can contribute to inclusion at UBC through those points of connection. Please note that not every goal or action in the IAP will be relevant to the mission of your unit, while some of the actions will be highly relevant. Your unit may be responsible for leading change on some of the actions.

## Step 1: Review the IAP

To determine how your unit's work may relate to the IAP, first familiarize yourself with the plan and the questions listed below. The planning committee can circulate the questions ahead of time for review alongside the IAP itself, prior to a broader discussion.

### Questions for discussion:<sup>1</sup>

1. What are your first impressions? What stands out as most important, and why?
2. How does the UBC Inclusion Action Plan relate to your unit's existing internal strategies, policies, or plans?
3. Which actions could you move forward in the immediate future, or without many additional resources?
4. In which areas are you most excited to expand work over the next three to four years and why? What would you most like to be known for in relation to equity, diversity and inclusion in the future?
5. Are there other important ways your unit engages issues of equity, inclusion and diversity that are not reflected in the UBC IAP? If so, what are they?

## Step 2: Determine Specific Opportunities and Responsibilities

With your insights from the review exercise above, use the IAP Review Worksheet to assess the extent to which each action of the IAP is relevant to your work. The table asks you to consider each action of the IAP in terms of:

- formal (i.e., unit is named as "lead") and informal opportunities to take a leadership role;
- your unit's responsibilities in relation to the action area;
- your unit's existing strengths in relation to the action area;
- Your unit's needs and challenges in relation to the action area.

## Next Steps

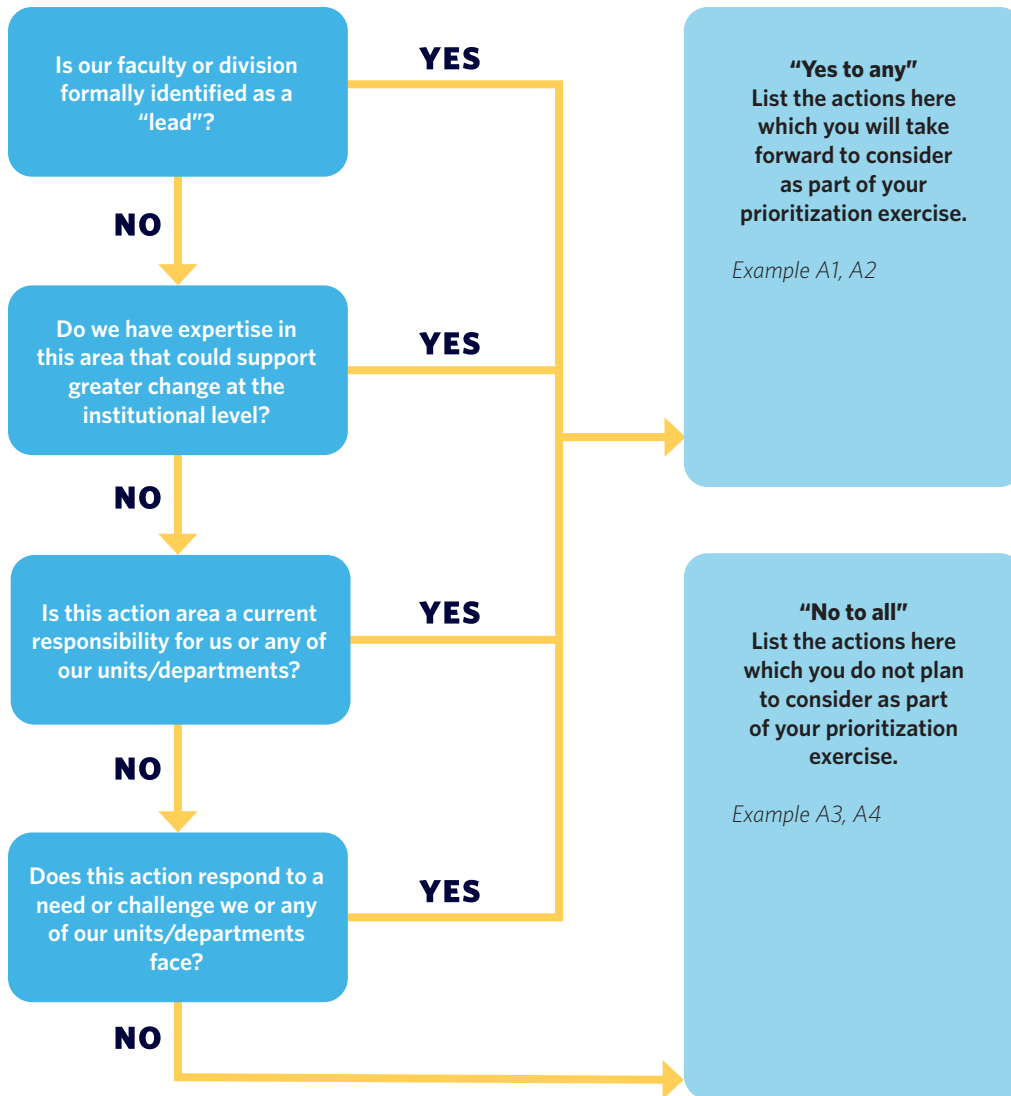
After completing the IAP Review Worksheet, the actions for which you have noted at least one “Yes” reflect the areas in which your unit could contribute to advancing the goals of the IAP. Summarize these results by placing them in the appropriate box below.

Next, consider which of these areas your unit wants to prioritize and address first. The [Prioritizing Your Inclusion Actions](#) tool has been designed to support this process.

## Endnotes

<sup>1</sup> Adapted from UC Berkeley (2015). “Campus Plan Review Worksheet” in Strategic Planning for Equity, Diversity, and Inclusion. University of California Regents. Accessed at: <https://diversity.berkeley.edu/sites/default/files/academic-strategic-toolkit-final.pdf>

## IAP Review Worksheet: Summary Chart



## Setting Your Inclusion Action Agenda: IAP Review Worksheet

Answer the following questions using the below worksheet (questions have been shortened in the column headings):

1. Is our faculty or division formally identified as a “lead”?
2. Do we have expertise in this area that could support greater change at the institutional level? How so?
3. Is this action area a current responsibility for us or any of our units / departments? If so, which ones?
4. Does this action respond to a need or challenge we or any of our units / departments face? If so, how?
5. How are we already addressing this action?

### 1.0 Goal: Recruitment, Retention and Success

UBC will actively recruit, support, retain and advance students, faculty, staff and leaders from systemically marginalized communities.

Action	1. Identified as a “lead”?	2. Area of expertise?	3. Current responsibility?	4. Responds to a need or challenge?	5. Already addressing this action?
<b>Example action</b>	No	Yes	Yes: example, etc.	Yes: example, etc.	XYZ, Example, etc.
<p><b>A. Recruit for EDI Skills and Competencies</b></p> <p>LEADS: Provosts; Senates; VP Human Resources</p> <p>Continue and enhance active recruitment for equity, diversity and inclusion skills and competencies, and increase the capability and capacity to collaborate in a diverse environment through all searches and in career progression for leadership, staff and faculty.</p>					

Action	1. Identified as a "lead"?	2. Area of expertise?	3. Current responsibility?	4. Responds to a need or challenge?	5. Already addressing this action?
<p><b>B. Equitable Recruitment &amp; Admissions</b></p> <p>LEADS: Provosts; VP, Human Resources; VP, Students</p> <p>Revise, renew and replace recruitment and hiring/admissions processes to actively take into account equity issues in the assessment of merit through job postings; criteria development; and selection of students, staff, faculty and leadership at UBC.</p>					
<p><b>C. Access through Affordability</b></p> <p>LEADS: Provosts; VP, Human Resources; VP, Students</p> <p>Reduce financial barriers to studying and working at UBC, particularly for Indigenous and other marginalized students, and support affordability strategies for transit, housing and childcare for faculty, staff and students.</p>					

Action	1. Identified as a "lead"?	2. Area of expertise?	3. Current responsibility?	4. Responds to a need or challenge?	5. Already addressing this action?
<p><b>D. Inclusive Spaces &amp; Initiatives</b></p> <p>LEADS: Provosts; VP, Human Resources; VP, Students</p> <p>Support mentorship, peer support, and affinity/resource groups that enhance spaces for and initiatives toward inclusion. Promote extra-curricular programming, professional development opportunities and events that help build inclusive cultures.</p>					
<p><b>E. EDI in Scholarship</b></p> <p>LEADS: Provosts; Senates; VP, Human Resources</p> <p>Expand and enhance opportunities for scholarship rooted in differences in worldviews that advances equity, diversity and inclusion.</p>					

Action	1. Identified as a "lead"?	2. Area of expertise?	3. Current responsibility?	4. Responds to a need or challenge?	5. Already addressing this action?
<p><b>F. EDI in Promotion</b></p> <p>LEADS: Provosts; VP, Human Resources</p> <p>Create and embed best practice guidelines for the recognition and valuing of EDI-related work, in collaboration with provosts, deans and collective bargaining units, in scholarship, teaching, educational leadership and service for faculty.</p>					
<p><b>G. Enhance Performance Review Processes &amp; Discussions</b></p> <p>LEADS: VP, Human Resources; Provosts</p> <p>Update performance review processes, discussion guides, and merit pay policies, in collaboration with provosts, deans and collective bargaining units, for staff and emerging leaders to include criteria for recognizing participation in initiatives and other contributions to advance equity, diversity and inclusion.</p>					



Action	1. Identified as a "lead"?	2. Area of expertise?	3. Current responsibility?	4. Responds to a need or challenge?	5. Already addressing this action?
<p><b>H. Implement Recommendations of Systems Reviews</b></p> <p>LEADS: VP, Human Resources; VP, Students; Provosts</p> <p>Implement the recommendations of the 2019 <i>Employment Systems Review</i> that assesses disparities in experiences for faculty and staff, and conduct a similar review to examine any disparities in experiences for students, including student-staff, teaching assistants, and postdocs.</p>					

## 2.0 Goal: Systems Change

UBC will be intentional and proactive in changing systems, structures, policies, practices, and processes to advance equity, diversity, and inclusion.

Action	1. Identified as a "lead"?	2. Area of expertise?	3. Current responsibility?	4. Responds to a need or challenge?	5. Already addressing this action?
<p><b>A. EDI Decision-Making Principles</b></p> <p>LEADS: All VPs, Board of Governors, Senate</p> <p>Develop, consult on and implement guidelines for decision-making that incorporate equity, diversity and inclusion principles.</p>					
<p><b>B. Indigenous Strategic Plan</b></p> <p>LEADS: President; Provosts; VP, Human Resources; VP, External Relations</p> <p>Support understanding and implementation of the <i>Indigenous Strategic Plan</i> across all units.</p>					
<p><b>C. Inclusion Action Planning</b></p> <p>LEADS: University Executive, Senate</p> <p>Ensure plans that incorporate inclusion actions are developed by and communicated throughout each executive portfolio and each faculty.</p>					

Action	1. Identified as a "lead"?	2. Area of expertise?	3. Current responsibility?	4. Responds to a need or challenge?	5. Already addressing this action?
<p><b>D. Leadership &amp; Succession Planning</b></p> <p>LEADS: Provosts, All VPs</p> <p>Develop and implement criteria for advancing into mid-level and senior leadership that requires that all leaders demonstrate commitment to principles of equity, diversity and inclusion and reflect the diversity of the UBC community.</p>					
<p><b>E. Degree Requirements</b></p> <p>LEADS: Senate, Provosts</p> <p>Incorporate equity, diversity and inclusion skills and competencies into degree requirements.</p>					
<p><b>F. Job Descriptions &amp; Performance Reviews</b></p> <p>LEADS: VP, Human Resources; Provosts</p> <p>Incorporate equity, diversity, and inclusion skills and competencies into job descriptions and provide training in how to assess these skills and competencies through performance reviews for staff and evaluations for faculty.</p>					

Action	1. Identified as a "lead"?	2. Area of expertise?	3. Current responsibility?	4. Responds to a need or challenge?	5. Already addressing this action?
<p><b>G. Workplace Accommodations for Disability</b></p> <p>LEADS: VP, Human Resources; VP, Finance &amp; Operations</p> <p>Develop and enact an institutional-level accommodation policy for faculty and staff with disabilities that is supported by a central accommodation fund.</p>					
<p><b>H. Inclusive Infrastructure</b></p> <p>LEADS: Provosts; VP, Human Resources; VP, Students</p> <p>Develop infrastructures for supporting and accommodating faculty, staff and students with respect to religious, spiritual and cultural observances, as well as flexible work, housing and childcare arrangements.</p>					
<p><b>I. Accessibility</b></p> <p>LEADS: VP, Finance &amp; Operations; VP, External Relations</p> <p>Enhance the accessibility of physical and virtual spaces on UBC campuses for students, staff and faculty.</p>					

Action	1. Identified as a “lead”?	2. Area of expertise?	3. Current responsibility?	4. Responds to a need or challenge?	5. Already addressing this action?
<p><b>J. IAP Planning, Implementation &amp; Reporting</b></p> <p>LEADS: Provosts; All Vice-Presidents</p> <p>Provide resources for department, faculty, and administrative unit level planning, implementation, and reporting on the Inclusion Action Plan.</p>					
<p><b>K. Equity Leads</b></p> <p>LEADS: Provosts; All Vice-Presidents</p> <p>Appoint a faculty or staff member within each department or unit who is responsible for coordinating the implementation of commitments made in the executive or faculty level plans at the local level, supported by an Equity Leads Network facilitated by the Equity &amp; Inclusion Office.</p>					

### 3.0 Goal: Capacity Building

UBC will enhance institutional and individual capacities and skills to succeed in and advance inclusive environments and work to sustain and continually evolve that capacity as skills and capabilities are increased.

Action	1. Identified as a "lead"?	2. Area of expertise?	3. Current responsibility?	4. Responds to a need or challenge?	5. Already addressing this action?
<p><b>A. EDI Education and Training Programs</b></p> <p>LEADS: Provosts; VP, Human Resources; VP, Students; VP, Research &amp; Innovation</p> <p>Resource, develop, implement, and evaluate comprehensive education and training programs on equity, diversity, and inclusion for students, faculty, and staff. Embed this education and training in recruitment processes, onboarding, assessment and performance reviews, and professional development for staff and faculty; and in curricular and co-curricular contexts for students.</p>					
<p><b>B. Dialogue and Engagement</b></p> <p>LEADS: Provosts; VP, Human Resources; VP, Students; VP, External Relations</p> <p>Facilitate and provide opportunities for dialogue and conversation around sensitive topics at UBC and beyond. Build conflict engagement skills and practices among all members of UBC's community to equip people for working across differences.</p>					

Action	1. Identified as a "lead"?	2. Area of expertise?	3. Current responsibility?	4. Responds to a need or challenge?	5. Already addressing this action?
<p><b>C. EDI Leadership Training</b></p> <p>LEADS: Provosts; VP, Human Resources</p> <p>Develop EDI curriculum and deliver/leverage training specifically for leadership at all levels to deepen understanding and encourage modelling of inclusive behavior, with a focus on applied skills and performance management in diverse workplaces.</p>					
<p><b>D. EDI Curriculum and Program Requirements</b></p> <p>LEADS: Provosts; Senates</p> <p>Embed equity and inclusion education into curriculum and program requirements for all students that incorporates intercultural understanding, empathy and mutual respect (see Truth and Reconciliation Commission of Canada's Calls to Action (iii) and UBC's Indigenous Strategic Plan).</p>					

#### 4.0 Goal: Learning, Research & Engagement

UBC will foster environments of learning, research, and engagement that value building and exchanging multiple and intersectional ways of knowing.

Action	1. Identified as a "lead"?	2. Area of expertise?	3. Current responsibility?	4. Responds to a need or challenge?	5. Already addressing this action?
<p><b>A. EDI Awards, Funding, and Incentives</b></p> <p>LEADS: Provosts; VP, Research &amp; Innovation</p> <p>Establish awards, funding, and incentives that recognize outstanding equity, diversity, and inclusion initiatives and contributions in learning, research, and engagement, including community engaged research and community-led initiatives.</p>					
<p><b>B. Inclusive Teaching and Learning</b></p> <p>LEADS: Provosts; Senates</p> <p>Encourage and support instructors and teaching assistants to implement inclusive course design, teaching practice, and assessments.</p>					



Action	1. Identified as a "lead"?	2. Area of expertise?	3. Current responsibility?	4. Responds to a need or challenge?	5. Already addressing this action?
<p><b>C. Funding Applications and Award Nominations</b></p> <p>LEADS: VP, Research &amp; Innovation; Provosts</p> <p>Embed equity, diversity, and inclusion principles in the review processes for all funding programs and award nominations including VP Research &amp; Innovation-administered internal funding competitions, internal research awards, institutional nominations for external awards and honours, and funding programs that require adjudication and peer-review. Equitably support researchers to develop funding proposals and award nominations.</p>					
<p><b>D. Research Funding</b></p> <p>LEADS: Provosts, VP, Research &amp; Innovation</p> <p>Advance the principles and intended outcomes of the equity, diversity, and inclusion initiatives of the Canada Research Chairs Program and the Dimensions Charter, as well as other existing and future government funding programs.</p>					

Action	1. Identified as a "lead"?	2. Area of expertise?	3. Current responsibility?	4. Responds to a need or challenge?	5. Already addressing this action?
<p><b>E. Equitable Community Relationships</b></p> <p>LEADS: VP, External Relations; VP, Finance &amp; Operations; VP, Research &amp; Innovation; Provosts</p> <p>Proactively build and strengthen UBC's relationships and improve institutional systems to appropriately recognize and compensate community members' engagement, and work more effectively with communities and organizations representing those who have been marginalized.</p>					
<p><b>F. Student Learning</b></p> <p>LEADS: Senates; VP, Students; Provosts</p> <p>Review and improve mechanisms to ensure that student perspectives on the inclusiveness of their learning experiences are integrated into the improvement of teaching.</p>					

Action	1. Identified as a "lead"?	2. Area of expertise?	3. Current responsibility?	4. Responds to a need or challenge?	5. Already addressing this action?
<p><b>G. Indigenous Strategic Plan Alignment</b></p> <p>LEADS: All VPs; Indigenous Engagement Committee; Provosts</p> <p>Work in alignment with the Indigenous Strategic Plan to support learning, research, and engagement at UBC that reflect the Truth and Reconciliation Commission of Canada's Calls to Action, the National Inquiry into Missing and Murdered Indigenous Women and Girls' Calls for Justice, and are consistent with the United Nations Declaration on the Rights of Indigenous Peoples.</p>					

**5.0 Goal: Accountability**

UBC will hold itself accountable to its commitment to inclusion through clear and timely processes, thorough evaluation, and transparent reporting to the UBC communities on its progress on this action plan.

Action	1. Identified as a “lead”?	2. Area of expertise?	3. Current responsibility?	4. Responds to a need or challenge?	5. Already addressing this action?
<p><b>A. Mechanisms for Annual Reporting</b></p> <p>LEADS: VP, Human Resources; Provosts; VP, Students</p> <p>Establish mechanisms for annual reporting on inclusive actions, including plans for future progress.</p>					
<p><b>B. Institutional Data</b></p> <p>LEADS: VP, Human Resources; VP, Finance &amp; Operations; VP, Students</p> <p>Ensure Workday collects institutional data with appropriate privacy safeguards to enable regular systematic analyses of access, engagement, promotion, success, attrition, etc., for students, staff, and faculty.</p>					

Action	1. Identified as a "lead"?	2. Area of expertise?	3. Current responsibility?	4. Responds to a need or challenge?	5. Already addressing this action?
<p><b>C. Enhanced Reporting Mechanisms</b></p> <p>LEADS: VP, Human Resources; Board of Governors</p> <p>Review and enhance streamlined mechanisms and related policies to better support people who experience harassment, discrimination, retaliation, and bullying to report incidents and policy breaches, and ensure annual reporting on aggregated incidents.</p>					
<p><b>D. External Contractors</b></p> <p>LEAD: VP, Finance &amp; Operations</p> <p>Create EDI criteria to engage all external contractors to work toward supporting an inclusive environment at UBC, and as a condition for being added to the preferred list of vendors or contractors for UBC.</p>					

Action	1. Identified as a “lead”?	2. Area of expertise?	3. Current responsibility?	4. Responds to a need or challenge?	5. Already addressing this action?
<p><b>E. External Reviews</b></p> <p>LEADS: Provosts; Deans</p> <p>Create terms of reference for the self-study document and directions to reviewers for external department and/or program reviews that includes:</p> <ul style="list-style-type: none"> <li>• an examination of the diversity of people within the department and concrete efforts to address any under-representation;</li> <li>• an analysis of the integration of historically marginalized forms of knowledge into the curriculum;</li> <li>• a demonstration within the department of the fulfillment of the Truth and Reconciliation Commission of Canada’s Call to Action, particularly Call 63 (iii).</li> </ul>					
<p><b>F. Annual Reporting on this Plan</b></p> <p>LEAD: Equity &amp; Inclusion Office</p> <p>Report annually to the campus communities on the progress of this plan, including actions planned and undertaken in each division, progress made, and updated information on changes in the metrics for each goal.</p>					