ACTIVATING INCLUSION TOOLKIT

Prioritizing EDI Actions

The purpose of this tool is to support units (departments, faculties, and divisions) in prioritizing and refining potential actions or projects that would advance equity, diversity, and inclusion at UBC. After using this tool, teams will have created a shortlist of priority actions.

Version: May 2023

Overview

Advancing equity, diversity, and inclusion (EDI) across an organization can often be complex and slow-moving due to the many interconnected parts of the system, some of which may be outside the control of a particular unit.

Some changes, even those that are seen as urgently needed, may take years of effort in a decentralized environment, while other changes which may seem challenging can happen very quickly when the right levers are activated.

While it is important not to lose sight of the larger goal of EDI at UBC, it can be empowering and equally important to identify concrete actions that you can take to advance inclusion at the local level. Seemingly small actions can help to establish a needed lever for change, or later be scaled "up, out, and deep" into more systemic change at the institution, once they are successfully piloted in a local context.[1]

- **Scaling up:** impacting policies and processes above the unit level;

- **Scaling out:** replicating, adapting, or sharing "promising practices" across similar units at the institution;

- **Scaling deep:** using the action as a starting point to impact "hearts and minds" and create cultural change.

As you work with this tool consider the number of action ideas that you select to prioritize in light of other competing responsibilities and duties. A potential strategy may be to start small, adding actions as you are able to show success and bring more people along as you progress.

Getting Started

To use this tool, you will need a list of potential action ideas your unit could take on to advance inclusion at UBC. This list may come from an engagement with the Strategic Equity and Anti-Racism (StEAR) Framework, the EDI Self-Assessment Tool, a brainstorming session, or any other process.

This tool helps you gain insight into your action ideas and presents four options for organizing, categorizing, and analyzing them. Depending on your context, you may decide to use one or more of these options in combination. These options can be used with a group such as a management team or planning committee, or with the full complement of staff and/or faculty in a given unit.
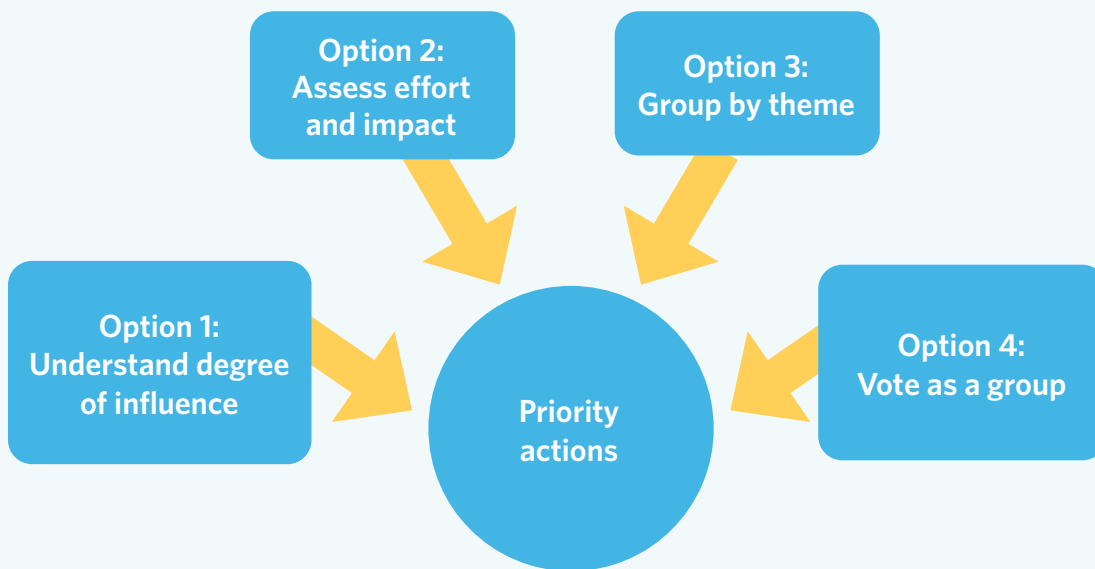
Option 2:
Assess effort
and impact

Option 3:
Group by theme

Option 1:
Understand degree
of influence

Priority
actions

Option 4:
Vote as a group

Figure 1: Idea prioritization and selection approaches

Option 1: Understand Degree of Influence

Consider who has the ability to make each idea happen. Understanding which of your ideas are firmly within your unit's control and which ideas require collaborating with other units or championing in other ways can help you decide where to focus your efforts. Group your action ideas into the following categories:

Who can make this happen?	Description	Implications
Our unit	• Changes to unit/department practices and policies, such as recruitment processes or the way a service is delivered. • Changes to individuals' ways of working that may be encouraged or facilitated by unit leadership, such as email signatures.	Your unit can develop an action plan to clarify how you will accomplish these actions.
External units, UBC leadership	• Changes to processes or practices that are delivered collaboratively between your unit and another unit. • Changes to UBC policies or processes, or the practices of another unit that has an impact on your unit.	Your unit may not be able to directly make this happen, but you can raise the profile of the idea through formal and informal communications with others across UBC, particularly through your unit's leaders.

You might decide to focus on a few ideas that your unit has the ability to impact, while also noting the ideas over which your unit holds less influence, that are also priorities for leadership to raise outside of the unit.

Option 2: Assess Effort and Impact

For each action idea, use the action priority matrix[2] to consider where you would place it in relation to the effort it would take to achieve the idea and the impact that achievement would have.
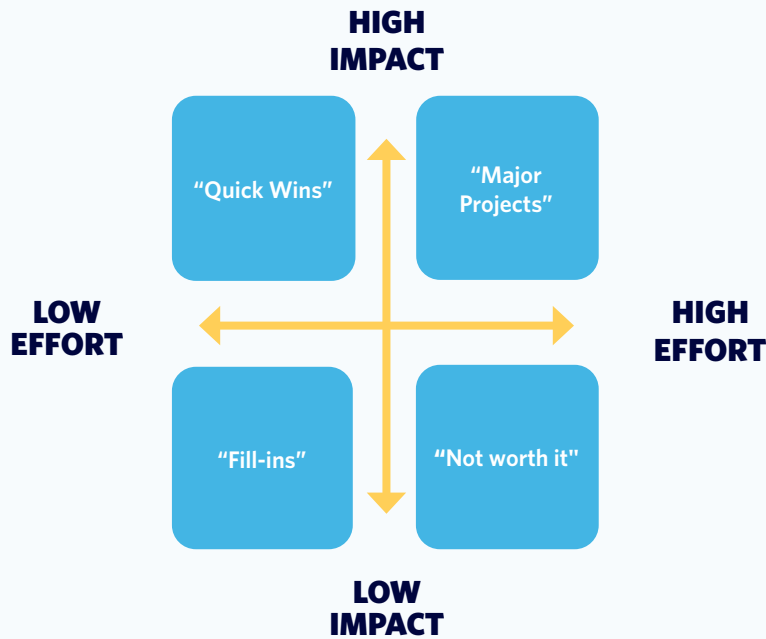
HIGH IMPACT

"Quick Wins"

"Major Projects"

LOW EFFORT

HIGH EFFORT

"Fill-ins"

"Not worth it"

LOW IMPACT

Figure 2: Action priority matrix

Estimate Effort

For each idea, determine how much effort it would take relative to the other actions. To do this, consider:

- the resources (human and financial) that would be needed to bring the idea into reality;

- how readily relevant systems and structures could accommodate the idea without requiring major changes;

- existing resources or initiatives (within the unit, UBC, or elsewhere) that you may be able to draw on or build upon (vs. starting from scratch);

- how easy it will be to motivate the relevant people to implement the action idea; how much excitement the idea generates;

- whether the action is totally or mostly within the control of your unit/department or whether you would need to advocate for others to work collaboratively with you.

Estimate Impact

For each idea, determine how much impact it would have relative to the other actions. To do this, consider:

- how deeply the action will improve the experiences of people from historically, persistently or systemically marginalized communities;

- how broad the reach of the action is; how many people it will impact;

- how well-aligned the action is with your other priorities, as well as other strategic priorities at UBC as represented in the Indigenous Strategic Plan, StEAR Framework, UBC Strategic Plan, Wellbeing Strategic Framework or other strategic documents;

- whether achievement of this action will have positive knock-on impacts on other parts of your work.

Plot your ideas in an "Action Priority Matrix" (above) where the x (horizontal) axis is effort and the y (vertical) axis is impact. The matrix sorts your action ideas into four categories:

Matrix Category	Description	Implications
"Quick wins"	Action ideas that require low effort and have a high impact.	These are great ideas to take on because they can make an impact in a relatively short time frame and help build momentum for change.
"Major Projects"	Action ideas that require high effort but also have a high impact.	These are important to make space for but should be balanced with "quick wins" to help maintain a sense of momentum.
"Fill-ins"	Action ideas that require low effort but also have low impact.	These ideas can be addressed when possible; for example, when they fit into existing workflows easily but don't need to be prioritized.
"Not worth it"	Action ideas that require high effort and have low impact.	Ideally avoid these ideas that will divert resources from more impactful work.

Ideally, you will want a mix of "quick wins" and "major projects". To end up with a manageable list from each category, consider undertaking prioritization exercises separately for each group of action ideas.

Option 3: Group by Theme

In reviewing your list of actions, it may be that there are natural "groupings" of actions. Grouping your ideas into clusters and sub-clusters can help to reduce your list of ideas to a manageable number of projects.

• Write each action idea on a separate slip of paper or post-it note.

• If the list is large, you may want to have multiple sets of all the action ideas so that participants can work together in small groups.

• Organize the ideas into thematic clusters that make sense together.

• A structured way of doing this would be to ask, "Is this similar to another idea we have, or is it different?" for each idea.

• Give each cluster a name that communicates what the ideas within the section have in common. For example, a cluster that includes "Find additional venues to advertise job postings" and "Review job descriptions for inclusive language" might be named "update recruitment practices."

Keep a record of the specific action ideas that fall under each of the thematic groupings to ensure that ideas are not lost when it is time to implement them.

You might decide to choose one or two thematic areas to focus on, each of which contains multiple smaller projects that a variety of team members can contribute to.

Option 4: Vote as a Group

A group vote exercise can help to structure a discussion about priorities for actions. The way committee or team members vote can provide useful information about where the energy is to move forward. This exercise can be used with a group such as a management team or planning committee, or with the full complement of staff and/or faculty in a given unit.

- Create a list of all potential action ideas and display them visually in the meeting space.

- Sort the ideas alphabetically or in another way that reduces bias toward any particular action or group of actions.

- Ask participants to vote for their top ideas that they would like the unit to prioritize. For example, give each participant three stickers to place next to their preferred ideas or create an interactive online poll.

- Participants could be encouraged to decide their votes using their own chosen criteria, such as how excited they are about the project, how urgently they think it is needed, etc. Alternatively, the group could agree on a set of criteria to be used by everyone.

- After everyone has voted, review which items received the most votes. Use the debrief questions below to guide discussion.

Keep in mind the potential for the emergence of group-think and other dynamics that may affect how people participate in this activity. Depending on your unit's culture, you may decide to capture team members' votes in an individualized or anonymized way.

Group Vote Debrief

As a group, discuss the items that received the most votes. Some guiding questions include the following.

- Is there anything unexpected or surprising in the vote patterns? Discuss participants' rationales for voting the way they did.

- Does the group agree that the goals that received the most votes are highest priority or is further refinement needed?

- Does it make sense to tackle the actions with the most votes at the same time, from a logistical perspective? For example, how would capacity and resources be balanced across the prioritized actions? Do most actions require the efforts of a particular team as opposed to a balance of effort across different teams?

Next Steps

With a manageable number of priority actions, your team should now have a clear understanding of why the chosen actions were selected and what they can achieve. You might decide to create a formalized project plan using the *EDI Action Planning Template* or set a timeline for returning to your original list of action ideas once some actions have been completed.

Endnotes

[1] Riddel, Darcy and Moore, Michelle-Lee (2015). Scaling Out, Scaling Up, Scaling Deep: Advancing Systemic Social Innovation and the Learning Processes to Support it. J.W. McConnell Family Foundation. Accessed at: https://mcconnellfoundation.ca/wp-content/uploads/2017/08/ScalingOut_Nov27A_AV_BrandedBleed.pdf

[3] Originator unknown. Accessed at: https://www.mindtools.com/pages/article/newHTE_95.htm