



ACTIVATING INCLUSION TOOLKIT

Actioning Equity, Diversity, and Inclusion through Systems Change

This tool supports planning committees in units (departments, Faculties, and divisions) to situate their equity, diversity, and inclusion (EDI) initiatives within a larger context of systems change, and to more precisely articulate the changes they are working toward. After using this tool, committees should have a shared understanding of the intended outcomes and/or impacts of their initiative and how their initiative can contribute to systemic change.

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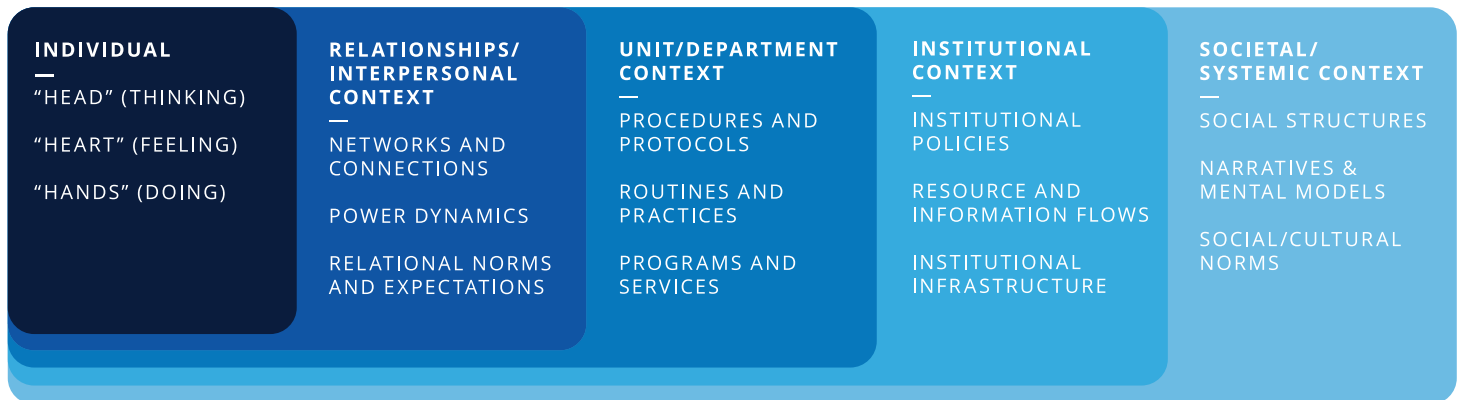
Overview

Advancing equity, diversity, and inclusion (EDI) in a large system like UBC is complex and non-linear. Being specific about the intended outcomes or focus of an initiative, and understanding where this fits within the larger landscape of the system, can be helpful in creating clarity about an initiative's potential impacts and strategic relevance.

Units can use this tool at one of these phases in the cycle of planning, learning, and action, for example:

- During the "assess current state" phase: identify which parts of the system existing EDI efforts affect, and assess opportunities for new initiatives
- During the "prioritize and plan" phase: develop ideas for specific changes to be made, and create clarity about the intended impacts of a prospective initiative
- During the "attempt solutions, learn, and iterate" phase: map the results that an initiative has achieved in different parts of the system

EDI Systems Change Framework



System Layers

This framework uses a social-ecological model which describes multiple, nested layers of systems. The model demonstrates the interconnectedness of individuals with their social contexts, structures, and environments.¹ Within each layer, there are different types of changes or outcomes to which EDI work contributes.

Individual

The individual layer refers to changes in the way that individuals think, feel, and behave. Ultimately, systems are made up of people whose decisions shape the system.

- **“Head” (Thinking):** Individuals’ understanding and knowledge of a particular topic or their way of thinking about an issue.
- **“Heart” (Feeling):** Individuals’ feelings or emotions about a particular topic or issue.
- **“Hands” (Doing):** Individuals’ behaviours, what they actually do in practice in a given situation.

Examples: Organizing a book club might influence individuals’ way of **thinking** about a particular topic, or (especially if the books involve narratives about people that the reader relates to) how individuals **feel** about a particular topic. A training on inclusive hiring might be aimed primarily at changing individuals’ behaviours during the hiring process (**doing**).

¹ Margherio, Cara, Elizabeth Litzler, and Carol Feghali-Bostwick. 2020. “Using a Social Ecological Model Framework for Advancing the Careers of Women in Science in Academic Medical Centers.” *ADVANCE Journal* 2 (1). <https://doi.org/10.5399/osu/ADVJRN.1.3.1>; Bond, M.A. and Haynes, M.C. (2014), *Workplace Diversity: A Social-Ecological Framework and Policy Implications*. *Social Issues and Policy Review*, 8: 167-201. <https://doi.org/10.1111/sipr.12005>

Interpersonal/relational context

At the relational or interpersonal layer, interventions might seek to change the number, strength, or quality of relationships between individuals. Relationships impact how the system behaves, for example, by changing how information flows through the system or by shifting who has influence over different parts of the system.

- **Networks and connections:** How individuals are connected to one another through relationships and membership of various groups.
- **Power dynamics:** The dynamics that expand or constrain how individuals influence or compel others towards a particular end result. Social status, organizational hierarchies, and personality all influence power dynamics.
- **Relational norms and expectations:** How people behave towards each other on an individual level, within their unique relationships and contexts

Examples: An affinity group for people who share similar experiences of marginalization might strengthen individuals' **connections** to one another. An initiative might seek to mitigate the effect of **power dynamics** in informal processes, such as who is tasked with taking notes during a meeting. A unit might try to shift their **relational norms and expectations** if microaggressions take place frequently in the unit.

Unit/department context

Changes at the unit/department level influence the context and parameters within which individual and relational changes take place. They also have the potential to serve as examples that can be adopted across other units or departments until they eventually become part of the institutional context.

Note: When using the framework, you can decide what entity best reflects the unit/department level depending on the scope at which you are working.

- **Procedures and protocols:** A unit's formalized processes, rules, and approaches to particular scenarios
- **Routines and practices:** A unit's ways of working; informal processes; what actually happens on the ground (as opposed to what is written down as procedure)
- **Programs and services:** The outward-facing deliverables of a unit; the specific things that a unit exists to do (including teaching and research for academic units).

Examples: A unit might implement a **procedure** of advertising job opportunities for a longer amount of time to reduce barriers to application. Units might attempt to shift a **practice** like how meetings are held, to improve accessibility. **Programs and services** are very specific to a unit's context; units might change either the content (of teaching, events, publications, etc.) or the delivery (method, timing, etc.) of their programs and services to be more inclusive.

Institutional context

The institutional context can constrain or expand the options available at the unit/department level, as well as influencing the relationships and individuals within the institution.

- **Resource and information flows:** How resources (e.g., funding, staffing, time) and information move through the institution.
- **Institutional infrastructure:** Structures and systems that support the functioning of the institution, such as data systems, organizational hierarchies, governance structures, etc.
- **Institutional policies:** The institution's formalized rules, procedures, and approaches to particular scenarios (e.g., admissions policies, human resource policies, etc.)

Note: Depending on your unit's location within UBC's structures, you might also consider your Faculty or Division as part of the UBC institutional layer.

Examples: An initiative to change grants and awards could impact how units and departments are able to support recruitment, retention, and success of particular groups (**resource flows**). An initiative to change **institutional infrastructure**, such as the system for collecting and storing student data, could likewise have an impact on unit processes, as well as on individuals' experiences interacting with these systems. An institution would normally shift an **institutional policy** through its governing bodies (Senates and Board of Governors).

Societal/systemic context

Everything within the institution also sits within a broader context of what is happening outside of or in connection with the institution, including cultural, political, and social structures and events. The social/systemic context influences all other levels within the system. Individuals and institutions can also influence the social/systemic context, although the influences may be harder to see.

- **Social structures:** How society is organized, including social institutions, economy, power, and systems of oppression.

- **Narratives and mental models:** Commonly held shortcuts and assumptions for understanding the world; the stories that are told about why things are the way they are. Narratives can be longstanding and stable, or they can be emergent or dynamic—for example when world events cause a broad shift in the conversation on a particular topic.
- **Social/cultural norms:** Prevailing expectations, rules and standards that guide or constrain social behaviours.

Examples: **Social structures** such as how the government and important social institutions are organized will impact the possibilities for what can happen within the university context, such as what funding is available for particular types of research. Many universities contend with a prevailing **mental model** of “what a professor looks like”, and have seen **narratives** around remote working shift during the COVID-19 pandemic. **Social/cultural norms** influence expectations around care giving and career goals which in turn impact individual behaviours.

Using the EDI Systems Change Framework

Map your intended change(s) onto the EDI Systems Change Framework using the worksheet on the next page. There are two ways to use this tool:

1. Results Mapping

If you (the planning committee) already have a specific project or initiative planned (or you have already started implementing it), use the framework to map what kinds of changes you expect your initiative to make. To get started, use the framework worksheet to describe the results you expect your initiative to achieve in different parts of the system (not all parts will be applicable to your initiative).

Discussion questions:

- Which parts of the system does your initiative aim to change, and how? Are these the right parts to focus on?
- Which parts of the system does your initiative have direct ability to influence, and which require advocacy or influencing others?
- Which parts of the system are outside of the scope of your initiative? Are there ways you could adjust your initiative to expand its influence in the system?

2. Identifying ideas for change

If you (the planning committee) have a general sense of the problem or issue you want to address, you can use this framework to understand more specifically what needs to change in different parts of the system. First, use the framework worksheet to describe the current state of affairs in each part of the system. Then, look at each part of the system in turn and discuss how you could design a project or initiative that would help to shift the state of affairs in some areas.

Discussion questions:

- What does the problem or issue look like in each part of the system? How does each part of the system reinforce the problem/issue?
- Which parts of the system have the biggest impact on the issue?
- If you were transported into a future in which you had addressed this problem, what would be different in each part of the system? Use a different colour or a second worksheet to document this.
- How can you develop a project or initiative that will help create some of the changes you identified?

Additional Resources

Kania, J., Kramer, M., and Senge, P. (2018). *The Water of Systems Change*. FSG. Accessed at: https://www.fsg.org/publications/water_of_systems_change

Narrative Initiative (2019). "Narrative Change: A Working Definition (and Some Related Terms)." Narrative Initiative Blog. Accessed at: <https://narrativeinitiative.org/blog/narrative-change-a-working-definition-and-related-terms/>

Petty, S. and Leach, M. (2020). *Systems Change & Deep Equity: Pathways Toward Sustainable Impact, Beyond "Eureka!", Unawareness & Unwitting Harm*. Change Elemental. Accessed at: <https://changeelemental.org/resources/systems-change-and-deep-equity-monograph/>

Systems Innovation (2020). *Leverage Points Guide*. Accessed at: <https://www.systemsinnovation.io/post/leverage-points-guide>

Worksheet: EDI System Change framework

Topic/initiative name:

Phase:

	"Head" (Thinking)	"Heart" (Feeling)	"Hands" (Doing)
Individual			
	Networks & connections	Power dynamics	Rel. norms & expectations
Relationships/ interpersonal context			
	Procedures & protocols	Routines & practices	Programs & services
Unit/department context			
	Institutional policies	Resource & info. flows	Institutional infrastructure
Institutional context			
	Social structures	Narratives & mental models	Social/cultural norms
Social/systemic context			

Sample Worksheet

This is an example of how a unit might fill in the worksheet for an initiative to provide EDI training to hiring committees within the unit.

Topic/initiative name:

Training initiative for hiring committees

Phase:

Prioritize and plan

	"Head" (Thinking)	"Heart" (Feeling)	"Hands" (Doing)
Individual	Hiring committees understand relevant EDI issues in a hiring context.	Hiring committee members are eager to hear about and learn from different approaches to the work.	Hiring committees use best practices to mitigate bias in the hiring process.
	Networks & connections	Power dynamics	Rel. norms & expectations
Relationships/ interpersonal context	Hiring committee members understand how to reach out broadly to attract the most diverse applicant pool.	All members of the hiring committee will feel empowered to speak up during decision making.	
	Procedures & protocols	Routines & practices	Programs & services
Unit/department context	Our unit will change its hiring processes to ensure that all hiring committees receive EDI training.	Our unit will routinely generate longer shortlists and makes an effort to include more qualified candidates from under-represented groups.	
	Institutional policies	Resource & info. flows	Institutional infrastructure
Institutional context			We will advocate for changes to applicant hiring data collection that will allow us to track statistics about EDI in hiring.
	Social structures	Narratives & mental models	Social/cultural norms
Social/systemic context			