ACTIVATING INCLUSION TOOLKIT

EDI Action Planning Template

This tool provides units (departments, faculties, and divisions) with a template to document their plans for actions and initiatives that advance equity, diversity, and inclusion (EDI). After using this tool, units should have a clear understanding of how they will move their actions and initiatives forward.

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Overview

Engaging in a proactive planning process that intentionally considers resources, infrastructure, incentives, and accountability needs will position your unit to advance equity, diversity, and inclusion (EDI) in a sustainable and iterative way.[1] It can help to position your EDI efforts as part of your unit's process of continuous improvement, rather than what Williams calls the "Diversity Crisis Model" in which EDI action is organized reactively only after a major negative event in relation to EDI, thus limiting its effectiveness.[2]

The process of articulating your unit's plan to advance equity, diversity, and inclusion has a number of benefits:

- It helps your *planning team* arrive at a common understanding of the vision and expectations of your EDI work.

- It helps establish and strengthen the working relationships that underpin the success of your initiatives.

- It helps clarify how the work will get done, including roles and responsibilities.

- It provides the information needed to allocate resources (including personnel time) appropriately.

- It provides a reference point for the future.

While creating the plan is an important step, it is always important to remember that planning must be followed up by the action necessary to advance EDI. Balance the amount of time and resources spent planning your initiatives with the time and resources needed to enact them. To move inclusion forward, the plan needs to be enacted (and resourced), reviewed and learned from, and adjusted as necessary.

Refining Your Action Ideas

Start with a short list of action ideas, for example, the outcomes of a brainstorming session, data analysis, the *assessment tool*, or a *prioritization exercise*.
Ensure your action items are framed in such a way that they are "SMART":

- **Specific:** Answers the "who, what, where, when, why" of this action.

- **Measurable:** Contains a clear signal for how you will know when the action has been completed.

- **Achievable:** Is realistic and something you can picture being accomplished, even if still aspirational.

- **Relevant:** Aligns with your local strategic plan, mission, or purpose, as well as with Strategic Equity and Anti-Racism Framework (StEAR).

- **Time-bound:** Has a deadline or time frame.

Writing Your Action Plan

After creating your Terms of Reference, you should have a blueprint for getting your planning team up and running. The next step is to begin activities that will move the committee's mandate forward. Many of the tools in the Activating Inclusion Toolkit are designed to be used by a small committee or working group.

EDI-Informed Action Planning

During the process of developing your action plan, consider the following questions. Taking EDI into account as part of your process of action planning will reinforce your goals of advancing EDI:

- Whose voices and priorities are reflected in the action plan? Whose are missing?

- Has the process for developing the action plan included the input of those who will be most affected by the changes we are proposing?

- Is the distribution of responsibilities in the action plan equitable? Are we providing adequate support to the individuals and groups who will be responsible for moving the plan forward?

- How will we ensure we follow through on this action plan? How will we communicate about our progress to those who these initiatives affect?

Action Plan Template

Action Idea	*Your action idea may be drawn from a previous exercise such as a brainstorm session, EDI Self-Assessment Tool, etc.*
Rationale	*Why are you pursuing this action? Describe your reasons so that someone unfamiliar with your process up to this point would be able to understand.*
SMART Action	*Rewrite your action idea to be specific, measurable, achievable, relevant, and time-bound*
StEAR Alignment	*With which of the Strategic Equity and Anti-Racism (StEAR) framework's domains of change does the project align?* ▫ *Structural* ▫ *Curricular* ▫ *Compositional* ▫ *Interactional*
Other Strategic Aligments	*Is your initiative aligned with any other strategic plans at UBC? If so, how?* ▫ *Shaping UBC's Next Century* ▫ *Inclusion Action Plan* ▫ *Indigenous Strategic Plan* ▫ *Other_____* ▫ *Focus on People* ▫ *Wellbeing Strategic Framework*
Intended Change	*What is the change you hope this action will contribute to?*
Review Date	*Set a date in the future that you will return to this action plan to check on progress and make adjustments as needed.*

Milestones/Steps	Person or group responsible	Resources needed (internal and external)	Start date	End date
Step 1	*Who will carry out this task?*	*E.g. time, materials, space*	*When will you start to work on this task?*	*By when should the task be completed?*
Step 2				
Etc.				

Next Steps

After you have developed your action plan, develop a process to regularly refer back to your plan and assess whether tasks are progressing. For example, add it as a standing agenda item to a regular meeting, or set a follow up meeting date. You can also identify appropriate opportunities to communicate about progress on the plan within your unit. The Tracking Progress and Learning from your EDI Initiatives tool can help you evaluate whether your plan is having the desired impact

In addition, keep in mind that an action plan is a living document. You can adjust it as you go based on new learnings and developments.

Endnotes

[1] Brooks, R. A., Clyburn, T., Milton, L., Valentino, R., Walker, B., and Williams, D. A. (2008). "Diversity Plans Can't Breathe without AIIR: Building a High-Caliber Diversity Initiative." St. Louis, MO: INSIGHT Into Diversity. Accessed at: *https://www.insightintodiversity.com/diversity-plans-cant-breathe-without-aiir-building-a-high-caliber-diversity-initiative/*

[2] Williams, D. A. (2008). Beyond the Diversity Crisis Model: Decentralized Diversity Planning and Implementation: Planning for Higher Education Volume 36, No. 2, pg. 27-41.

Additional Resources

Community Tool Box. (n.d.). "Developing an Action Plan," in Developing a Strategic Plan and Organizational Structure. Center for Community Health and Development, University of Kansas. Accessed at: *https://ctb.ku.edu/en/table-of-contents/structure/strategic-planning/develop-action-plans/main*

Community Tool Box. (n.d.). "Identifying Action Steps in Bringing About Community and System Change," in Developing a Strategic Plan and Organizational Structure. Center for Community Health and Development, University of Kansas. Accessed at: *https://ctb.ku.edu/en/table-of-contents/structure/strategic-planning/identify-action-steps/main*