



SUBJECT	Inclusion Action Plan: Implementation Update
SUBMITTED TO	People, Community and International Committee
MEETING DATE	September 9, 2020
SESSION CLASSIFICATION	Recommended session criteria from Board Meetings Policy: OPEN
REQUEST	For information only - No action requested
LEAD EXECUTIVE	Marcia Buchholz, Vice-President, Human Resources
SUPPORTED BY	Lesley Cormack, Deputy Vice-Chancellor, UBC Okanagan Ainsley Carry, Vice-President, Students Andrew Szeri, Provost and Vice-President Academic, UBC Vancouver Sara-Jane Finlay, Associate Vice-President, Equity and Inclusion

PRIOR SUBMISSIONS

The subject matter of this submission has been considered previously by the People, Community and International Committee on the following occasions:

[November 26, 2019](#) (OPEN SESSION)

Action/Follow up: Consider and consult with the Vice-Presidents of each division, the Deans of Faculties, and the Okanagan Leadership Team on the plan and resources needed for implementation (completed).

EXECUTIVE SUMMARY

In December 2019 and January 2020, the Associate Vice-President, Equity & Inclusion (AVPEI) consulted with the majority of Deans and VPs at UBCO and UBCV for their input and ideas on implementation. Subsequently, the Vice-President, Human Resources, Vice-President, Students and the Provost and Vice-President, Academic UBCV, identified a number of priority actions for implementation in Years 1 and 2. A revised Implementation Plan for the [Inclusion Action Plan](#) ([Strategy 1: Great People](#), and [Strategy 4: Inclusive Excellence](#)) includes the creation of organizing structures to create greater focus and clarity on the priority actions for UBCV. Priorities and implementation approaches are in development at UBCO.

At the institutional level, the Implementation Plan includes:

1. An Inclusion Action Plan Steering Committee, comprised of relevant expertise across the UBC community as outlined in the Terms of Reference. The Inclusion Action Plan Steering Committee oversees and guides the implementation, evaluation, and reporting on the IAP across the institution.
2. Action Teams (one for each prioritized action for Years 1 and 2) are responsible for guiding the implementation, evaluation, and reporting on progress across the institution for their respective priority action, and ensuring that the action contributes to achieving the goal. Action Coordinators who are subject matter experts will be appointed by the responsible Executive to the corresponding Action Teams. The internally elected Chairs of the Action Teams will sit on the Inclusion Action Plan Steering Committee.

At the divisional level, each Vice-President and Dean has been invited to appoint an Inclusion Action Lead to plan for and support implementation of inclusive actions within the division or Faculty. The Inclusion Action Leads are supported by a Community of Practice.

At the unit level, departments and units are invited to identify an Equity Lead who can participate in the Equity Leads Network, and receive support through Inclusion Symposia and the Equity & Inclusion Office.

The official launch of the Inclusion Action Plan will be phased in as it makes sense with changing events: currently, a leadership-focused event is anticipated for the Autumn of 2020, faculty and staff focused-event(s) over the winter 2020/21, and a student-focused event in the spring of 2021. The inclusive.ubc.ca website will be further developed in phases to correspond to the launch of these focused events.

SUPPLEMENTAL MATERIALS (optional reading for Governors)

1. Implementation Plan Structures & Functions
2. Draft Terms of Reference for the Steering Committee and Action Teams
3. Matrix to Assist with Appointment of Action Coordinators to the Action Teams



IAP Implementation Update

People, Community & International Committee
September 9, 2020

Sara-Jane Finlay

Associate Vice-President, Equity & Inclusion





Inclusion Action Plan

- **Five goals and institutional level actions for each goal:**
 - Capacity Building
 - Recruitment, Retention & Success
 - Learning, Research & Engagement
 - Systems Change
 - Accountability
- Actioning this work will require the involvement of **many** different bodies across campus over the next seven years.
- Not all actions are relevant to every division.

Strategic plan alignment



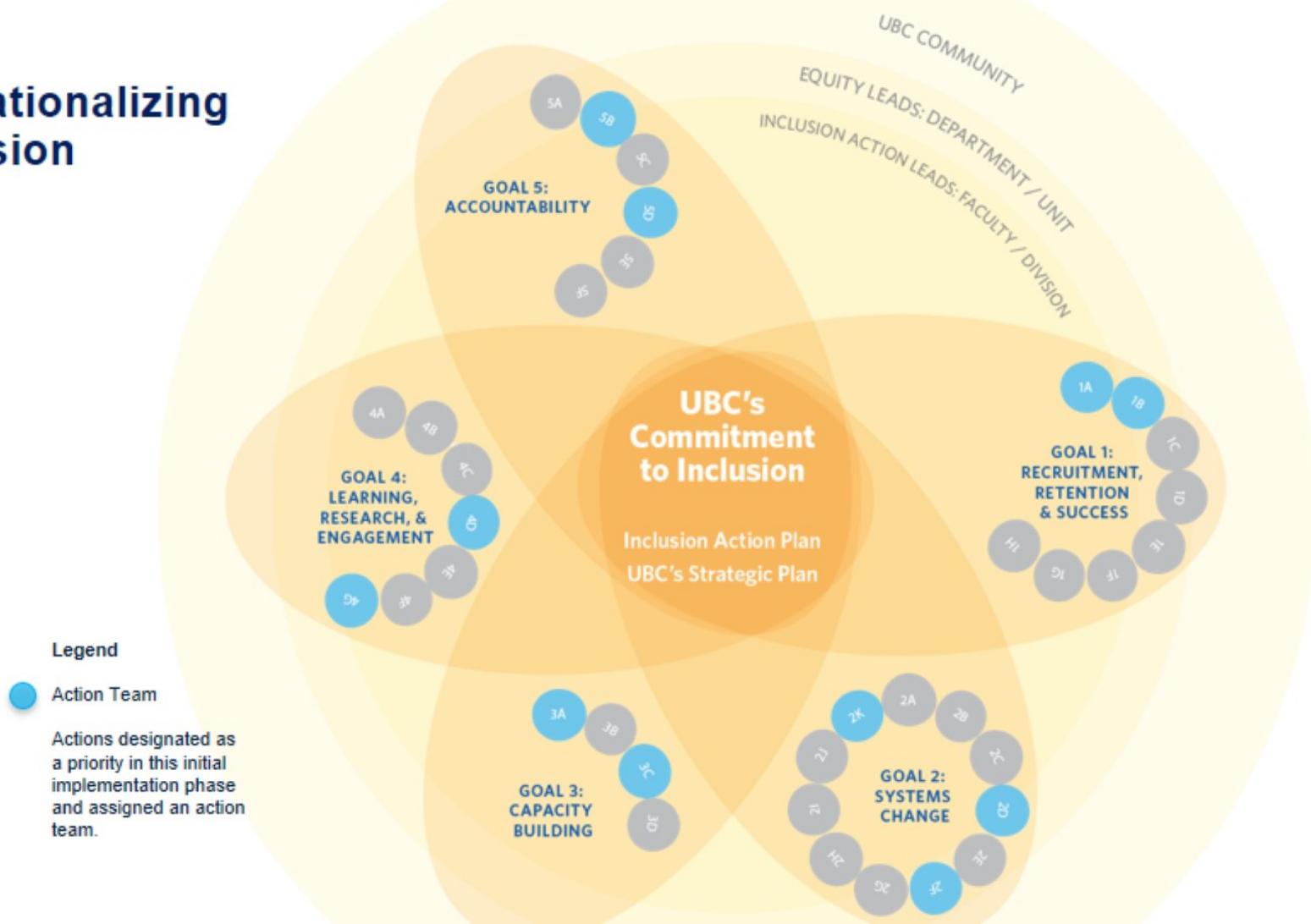
Goals:

- *Inclusion Theme of Strategic Plan*
- Build a diverse culture

Core areas and strategies:

- *Strategy Four: Inclusive Excellence*
- S1. Great people

Operationalizing Inclusion



Inclusion Action Plan - Implementation



- Structures:
 - Institutional level – IAP Steering Committee, Action Teams
 - Faculty/divisional level – IA Leads Community of Practice
 - Unit/department levels – Equity Leads Network
- Immediate focus on the 11 actions from the five goals chosen as priorities by the VP Human Resources, VP Students, and UBCV Provost and VP, Academic. UBCO is undertaking a separate process to establish priorities.
- Accountability and broad engagement in implementing inclusive initiatives that are relevant to local context in UBC's large, decentralized institution .

Implementation Roles



Goal 1.0: Recruitment, Retention & Success



1A

A. Recruit for EDI Skills and Competencies

Continue to 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.

Action Team 1A

Subject matter experts appointed by the Executive Leads for this action:

- Provost and VP, Academic
- VP, Human Resources



Supporting the Implementation



Equity & Inclusion Office:

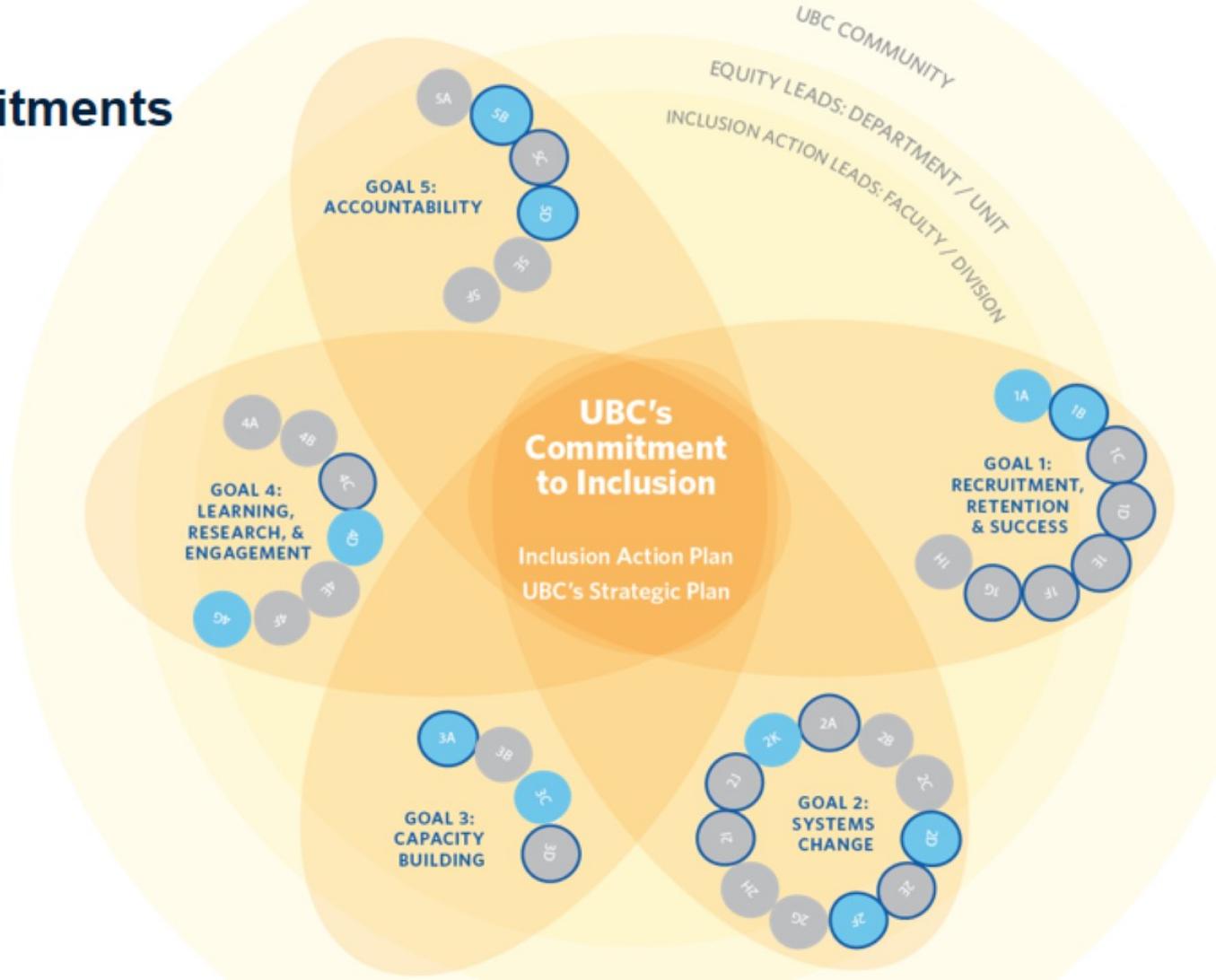
- Activating Inclusion Tools and Resources
- [Inclusive.UBC.ca](https://inclusive.ubc.ca)
- Capacity building, facilitation, and evaluation support

President's Commitments and VPs' Priorities in the Inclusion Action Plan

Legend

 IAP actions aligned with President's commitments

 IAP actions designated as VPs' Priorities in this initial implementation phase.



President's Anti-Racism Commitments



Discussions of systemic racism

- Action 1.D: Inclusive Spaces and Initiatives
- Action 2.A: EDI Decision-Making Principles
- Action 3.A: EDI Education & Training Programs

EDI integrated into core academic mission

- Action 1.E: EDI in Scholarship
- Action 2.E: Degree Requirements
- Action 3.D: EDI Curriculum & Program Requirements
- Action 4.C: Funding Applications & Award Nominations

President's Anti-Racism Commitments



Identifying & addressing gaps in support for racialized faculty, staff & students

- Action 1.D: Inclusive Spaces and Initiatives
- Action 2.J: IAP Planning, Implementation & Reporting
- Action 5.C: Enhanced Reporting Mechanisms

President's Anti-Racism Commitments



Systemic barriers to hiring and retention of racialized faculty & staff

- Action 1.B: Equitable Recruitment & Admissions
- Action 1.C: Access through Affordability
- Action 1.F: Equity, Diversity, and Inclusion in Promotion
- Action 1.G: Enhance Performance Review Processes & Discussions
- Action 2.D: Leadership & Succession Planning
- Action 2.F: Job Descriptions & Performance Reviews
- Action 2.I: Accessibility
- Action 5.B: Institutional Data
- Action 5.D: External Contractors

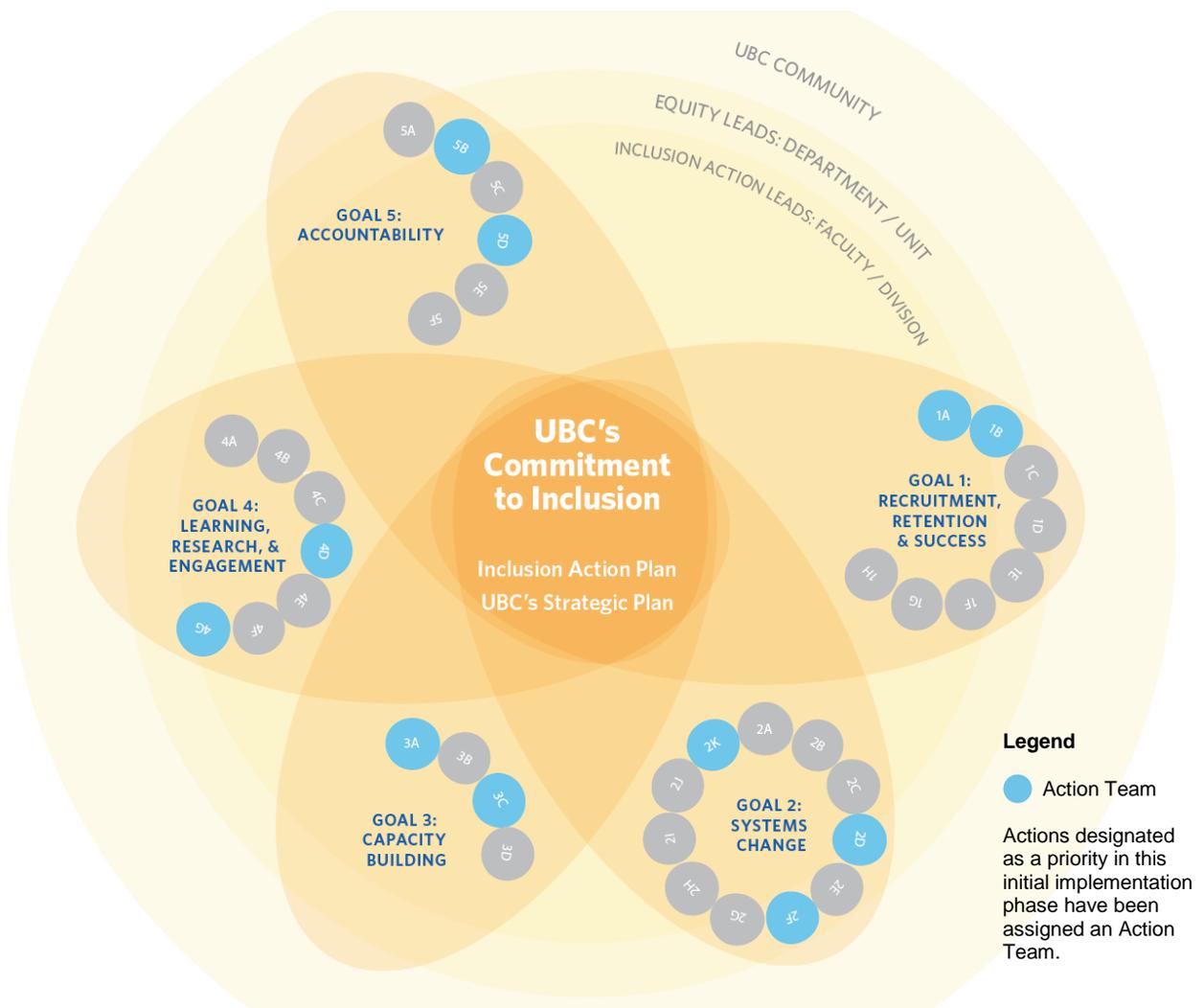


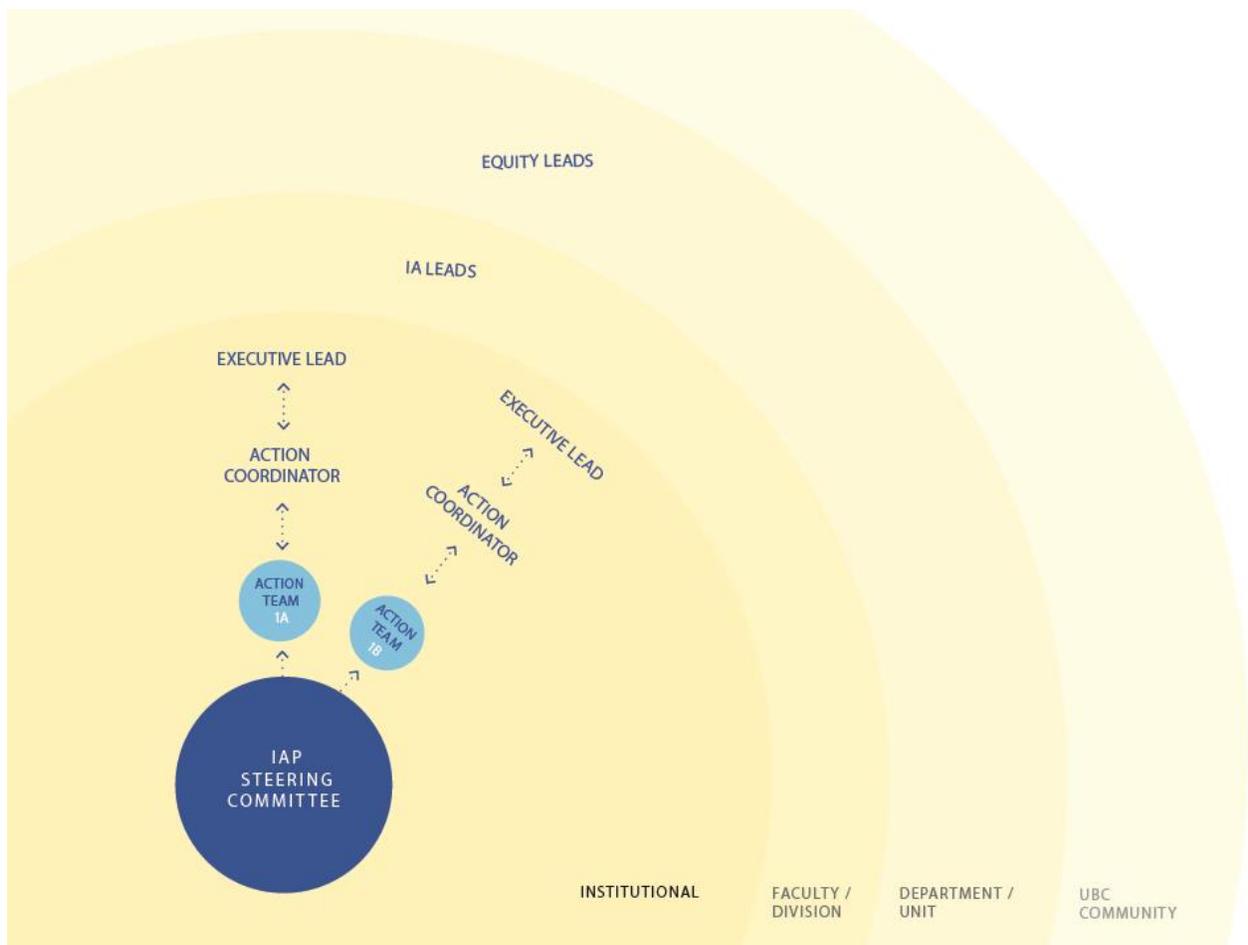
THE UNIVERSITY OF BRITISH COLUMBIA

Inclusion Action Plan

Implementation Infrastructure

The Equity & Inclusion Office is working with the Executive and Senior Leadership to finalize a plan and process to implement the Inclusion Action Plan. The diagram below provides a comprehensive picture of the implementation infrastructure over the next seven years. Below, each section of the diagram is discussed in terms of proposed function and processes.





Inclusion Action Plan Steering Committee: Oversees and guides the implementation, evaluation of, and reporting on the IAP across the institution. Ensures that annual reporting to the UBC communities is meaningful, evidence-based, and focused on learning. Membership includes Chairs of the Action Teams (see below), representatives of the lead Executive portfolios and others with relevant expertise, including Senior Advisors to the President and Provosts. Meetings will occur two times a year.

Action Teams: One for each priority action, guiding the development of implementation plans, accountability measures, and reporting on progress for that action across the institution. Action Teams are made up of Action Coordinators who are responsible for the priority actions. For example, Goal 3.0, Capacity Building, Priority Action A, *EDI Education & Training Programs* has the following as Leads on the action under that goal: Provosts, VP Human Resources, VP Students, VP Research & Innovation. Each of those VPs will appoint Action Coordinator(s) to ensure their portfolio’s leadership with respect to each of those particular actions where they are named as Leads. The Action Coordinators will elect a Chair to represent them at the IAP Steering Committee. Action Teams will meet quarterly.

Inclusion Action Leads - Divisionally, each VP portfolio and Faculty is responsible for incorporating inclusive actions into their strategic planning. All actions will not be relevant to all portfolios or Faculties. Each VP portfolio and Faculty is invited to appoint an **Inclusion Action (IA) Lead** to coordinate inclusive actions within that division, and to gather information on initiatives, learning, and evidence of positive change from departments and units within the division. IA Leads will be supported in **Community of Practice** workshops every two months to share ideas and build capacity for effective implementation of their inclusive action planning priorities.

Equity Leads Network - Unit/Department Level: EDI initiatives and equity committees have been and will be underway at the unit and/or department levels within divisions. Some units and/or departments may choose to develop their own Inclusion Action Plan or set of actions. IA Leads will be a primary point of contact for unit or department level work including through supporting capacity building, ensuring information is communicated both to and from the units or departments, and facilitating the reporting on the learning and results from initiatives. An Equity Leads Network will be formed, and each year there will be an Inclusion Symposium to showcase these unit/department level initiatives, learning, and results.

Equity & Inclusion Office: The EIO will provide coordination and facilitation support to implementation structures (IAPSC, Action Teams, CoP, Equity Leads Network & Annual Symposium), and support capacity building, evaluation, reporting, and communications. The EIO will also provide tools and resources to support implementation of inclusion actions for units and departments.

Steering Committee – Inclusion Action Plan

Terms of Reference

In 2018, the University of British Columbia developed *Shaping UBC's Next Century: 2018–2028 Strategic Plan*. During the planning process, the UBC community converged on three themes: Inclusion, Collaboration, and Innovation. These three themes are cross cutting, spanning the core areas of People & Places, Research Excellence, Transformative Learning, and Local & Global Engagement.

To operationalize the inclusion theme of the strategic plan, UBC developed an [Inclusion Action Plan](#) (IAP) based on extensive consultations across UBC, and approved in late 2019. The IAP contains 36 actions organized under 5 goals, to increase equity, diversity, and inclusion at UBC over the next 7-10 years. Governance and implementation structures support the IAP's implementation at the institutional, divisional, and unit levels. The Inclusion Action Plan Steering Committee is the overarching governance body for the IAP.

Purpose: The Committee oversees the strategic implementation of the Inclusion Action Plan.

Role: The Inclusion Action Plan Steering Committee (IAPSC) will provide strategic direction and leadership to ensure the implementation of the Inclusion Action Plan (IAP) at UBC. It will support resource mobilization and stakeholder engagement; ensure transparency and accountability; and approve annual plans and reports to the UBC community including:

- Ensuring that the recommended plans and strategies advance the goals of UBC's strategic plan, particularly the theme of inclusion, and the strategies under People & Places
- Enhancing the university's financial capacity to implement the Inclusion Action Plan, and embed equity and diversity across university systems and structures
- Developing a shared understanding of the issues beyond finances needed to address equity, diversity, and inclusion of historically, persistently, and systemically marginalized groups within the UBC community
- Ensuring alignment with the Indigenous Strategic Plan
- Providing direction on strategic issues emerging from the IAP Action Teams
- Reporting to the Board of Governors annually on progress toward the goals of the IAP.

Members: The Committee consists of representatives (or designates) from key stakeholders of UBC:

- Chair: Associate Vice-President, Equity & Inclusion
- Co-Chair
- Provost and Vice-President, Academic UBCV
- Provost and Vice-President, Academic UBCO
- Vice President, Human Resources
- Vice-President, Students
- Vice-President, Finance & Operations
- Vice-President, Research & Innovation
- Vice-President, External Relations
- Chairs of each of the eleven Action Teams
- Special Advisor to the President on Indigenous Affairs
- Senior Advisor to the Provost on Racialized Faculty
- Senior Advisor to the Provost on Women and Gender-Diverse Faculty

Staff Supports: Equity & Inclusion Office

Functioning of Committee:

Decisions are made by consensus. The Committee will meet at least two times a year and will communicate between meetings as needed by email. Meeting minutes will be provided. There will be annual reporting to the Board of Governors on the progress made on the IAP as part of PCIC Board reporting.

Action Teams – Inclusion Action Plan

Terms of Reference

Introduction

In 2018, the University of British Columbia developed *Shaping UBC's Next Century: 2018–2028 Strategic Plan*. During the planning process, the UBC community converged on three themes: Inclusion, Collaboration, and Innovation. These three themes are cross cutting, spanning the core areas of People & Places, Research Excellence, Transformative Learning, and Local & Global Engagement.

To operationalize the inclusion theme of the strategic plan, UBC has developed an [Inclusion Action Plan](#) (IAP). The IAP contains 36 actions organized under five goals:

1. Recruitment, Retention, and Success
2. Systems Change
3. Capacity Building
4. Learning, Research & Engagement
5. Accountability

A core purpose of the IAP is to “ensure academic departments and operational units across UBC can incorporate inclusive actions into their unit-level planning.” No one individual Faculty, Division, department or unit is expected to complete all of the actions in the IAP.

In spring 2020, 11 of the 36 actions, spanning all of the goals, were prioritized by the UBCV Provost and Vice-President, Academic, the Vice-President, Human Resources, and the Vice-President, Students for this initial implementation phase. The UBCO Provost and Vice-President, Academic is working with students, staff, and faculty to develop priorities for their implementation planning.

Purpose

Action Teams will develop project plans and accountability measures to ensure the implementation of each of the priority actions is contributing to the achievement of that goal. As the actions are often overlapping, these may also create collaborative opportunities between and among Action Teams.

Action Team Members

The Action Team consists of subject matter experts appointed by the Leads named for each priority action.

Goal 1.0: Recruitment, Retention, and Success

Action Team 1A

A. Recruit for EDI Skills and Competencies

Continue to 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.

Executive Leads to appoint subject matter experts:

- Provost
- Vice-President, Human Resources

Action Team 1B

B. Equitable Recruitment & Admissions

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.

Executive Leads to appoint subject matter experts:

- Provost
- Vice-President, Human Resources
- Vice-President, Students

Goal 2.0: Systems Change

Action Team 2D

D. Leadership & Succession Planning

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.

Executive Leads to appoint subject matter experts:

- Provost
- Vice-President, Human Resources
- Vice-President, Students
- Vice-President, Research & Innovation
- Vice-President, Finance & Operations
- Vice-President, External Relations
- Vice-President, Development & Alumni Engagement

Action Team 2F

F. Job Descriptions & Performance Reviews

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.

Executive Leads to appoint subject matter experts:

- Vice-President, Human Resources
- Provost

Action Team 2K

K. Equity Leads

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 & Inclusion Office.

Executive Leads to appoint subject matter experts:

- Provost
- Vice-President, Human Resources
- Vice-President, Students
- Vice-President, Research & Innovation
- Vice-President, Finance & Operations
- Vice-President, External Relations
- Vice-President, Development & Alumni Engagement

Goal 3.0. Capacity Building

Action Team 3A

A. EDI Education and Training Programs

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.

Executive Leads to appoint subject matter experts:

- Provost
- Vice-President, Human Resources
- Vice-President, Students
- Vice-President, Research & Innovation

Action Team 3C

C. EDI Leadership Training

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.

Executive Leads to appoint subject matter experts:

- Provost
- Vice-President, Human Resources

Goal 4.0 Learning, Research, and Engagement

Action Team 4D

D. Research Funding

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.

Executive Leads to appoint subject matter experts:

- Provost
- Vice-President, Research & Innovation

Goal 5.0 Accountability

Action Team 5B

B. Institutional Data

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.

Executive Leads to appoint subject matter experts:

- Vice-President, Human Resources
- Vice-President, Students
- Vice-President, Finance & Operations

Action Team 5D

D. External Contractors

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.

Executive Leads to appoint subject matter experts:

- Vice-President, Finance & Operations

Staff Supports to Action Teams

- Equity & Inclusion Office

Functioning of Teams:

Decisions are made by consensus. The Action Teams will meet at least four times a year and will communicate between meetings as needed by email. Meeting minutes will be provided. There will be regular reporting to the IAP Steering Committee at its meetings through each Action Team Chair.

MATRIX TO ASSIST WITH APPOINTMENT OF ACTION COORDINATORS TO ACTION TEAMS

Goal 1.0: Recruitment, Retention & Success

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

	LEADS:	Provost	VPHR	VP S	VPFO	VPRI
Action Team 1A						
A. Recruit for EDI Skills and Competencies						
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.		√	√			
Action Team 1B						
B. Equitable Recruitment & Admissions						
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.		√	√	√		

MATRIX TO ASSIST WITH APPOINTMENT OF ACTION COORDINATORS TO ACTION TEAMS

Goal 2.0: Systems Change

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

LEADS:	Provost	VPHR	VP S	VPFO	VPRI
Action Team 2D					
D. Leadership & Succession Planning					
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.					
Action Team 2F					
F. Job Descriptions & Performance Reviews					
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.					
Action 2K – No Team Required – EIO will engage with Departments & Units					
K. Equity Leads					
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 & Inclusion Office.		Equity & Inclusion Office will facilitate Network as Equity Leads are identified to focus on capacity building, community building, and learning from and celebrating inclusive action.			

MATRIX TO ASSIST WITH APPOINTMENT OF ACTION COORDINATORS TO ACTION TEAMS

Goal 3.0: 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.

LEADS:	Provost	VPHR	VP S	VPFO	VPRI
Action Team 3A					
A. EDI Education and Training Programs					
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.					
	√	√	√	√	
Action Team 3C					
C. EDI Leadership Training					
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.					
	√	√			

MATRIX TO ASSIST WITH APPOINTMENT OF ACTION COORDINATORS TO ACTION TEAMS

Goal 4.0: Learning, Research & Engagement

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

	LEADS:	Provost	VPHR	VP S	VPFO	VPRI
Action Team 4D						
D. Research Funding						
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.		√			√	
Action Team 4G						
G. Indigenous Strategic Plan Alignment						
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.		√	√	√	√	√

MATRIX TO ASSIST WITH APPOINTMENT OF ACTION COORDINATORS TO ACTION TEAMS

Goal 5.0: 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.

	LEADS:	Provost	VPHR	VP S	VPFO	VPRI
Action Team 5B						
B. Institutional Data						
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.			√	√		√
Action Team 5D						
D. External Contractors						
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.						√