

# Case Study: Financial Services

## IMPLEMENTATION TOOLKIT

During the spring and summer of 2023, Financial Services volunteered as one of the first groups at the University of Victoria to try out the new Equity Action Plan (EAP) Implementation Framework. The framework and accompanying toolkit are designed to support unit-level action of the EAP. Over a series of carefully planned meetings this university department completed the Get Started phase, arriving at clear priorities and able to move forward into action.

### The department

Financial Services (FINS) is responsible for many of the university's financial and accounting affairs and is comprised of four individual units: Payment and Banking Services, Payroll, Purchasing Services, and Research Accounting.

Over 2022/2023, five FINS leaders participated in an equity focused leadership learning series with other leaders from across the Vice President Finance and Operations portfolio. Working on how they could advance the EAP was a logical next step to practice the knowledge and skills learned and start engaging the unit more broadly. Catherine Nightingale, Director of Payment and Banking Services, was tasked with initiating the department's implementation.

### The working group

The working group was made up of volunteers from each of the 4 units within FINS and came from all different employee groups (different roles, unions, including co-op students). While inevitably, some members had more relevant life experience or applicable training to the work, the committee benefited from being made up of individuals with a variety of levels of expertise and knowledge relevant to the work. Different members were able to bring project, committee, or leadership skills to add context to existing practices or processes and this committee provided volunteers opportunities to use skills that may be outside of their usual job description and work commitments.

### Using the tools

After reviewing the toolkit resources, Catherine designed a condensed 5-week program to set up the working group and arrive at clear departmental level priorities. The short timeframe, with weekly meetings, was developed to maintain the momentum and engagement of the working group. Here's the summarized process:

	Meeting focus	Tools used
<b>Week 1</b>	Working group introductions, roles and ways of working	<a href="#">Equitable Engagement for Implementation</a>



<b>Week 2</b>	Review Implementation Framework	<a href="#">Implementation Framework</a>
<b>Week 3</b>	Discuss EAP goals and use worksheet to identify which action FINS can contribute to	<a href="#">Your Unit within the EAP</a>
<b>Week 4</b>	Brainstorm activity ideas	<a href="#">Ideating and Prioritizing Activities</a>
<b>Week 5</b>	Prioritize activity ideas	<a href="#">Ideating and Prioritizing Activities</a>

## Outcomes and learnings

After the working group wrapped up their 5 weeks of meetings, they generated a list of over 50 activity ideas. They prioritized this list down to 6 projects that they presented to FINS leadership (directors, managers and supervisors). This leadership group chose two of the projects to start with while the rest remained medium- and long-term goals.

Next steps have involved building separate working groups to begin work on the top priorities – the first focused on increasing senses of belonging amongst this large and diverse department and the second, on improving onboarding practices for new employees. The rest of the Implementation Framework will support this ongoing work.

## Tips from Financial Services

Catherine reflected on some of her key take aways and tips for others thinking of leading this process in their units:

- **Start together** – Before forming their EAP working group, Catherine organized EDI 101 training for the entire FINS team. This provided an opportunity to establish a common understanding of terms and concepts related to equity while also establishing the Equity Action Plan as a key priority within FINS. After the session, they put out a call for volunteers to participate in the working group with great success.
- **Build trust** – Catherine used the first working group meeting to build trust amongst working group members by providing them opportunities to share their background and life experiences that led them to be interested in EDI work. Members also discussed how they wanted to work together and established their own group norms. This helped foster a sense of openness and collaboration which benefited their work together.
- **Encourage equitable participation** – Catherine was initially concerned she wasn't knowledgeable enough about the subject of EDI to lead the working group but after discussing roles at the first working group it was established that her role would be to facilitate the meetings and share the EAP resources that were part of the toolkit. Instead of taking an 'expert' position, Catherine encouraged members to work in such a way that all ideas and suggestions would be valued.
- **Commit to action** – Having FINS leadership make a commitment to action based on the work of the working group was important for building buy-in throughout the department.
- **Share the process** – sharing the experience and methodology with other leaders was an important part of encouraging others to take on the work of advancing the EAP.

## Questions?

The Equity Action Team can assist with coaching and troubleshooting, email us at [equityaction@uvic.ca](mailto:equityaction@uvic.ca).

