

PROJECT

A Soft and Critical Systems approach exploring Equality, Diversity, and Inclusion (EDI) challenges in a Research Project Team

PRACTITIONER

Emilia Slawkowska

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SITUATION AND CONTEXT

EDI implementation requires a holistic and systematic approach addressing root causes whilst setting clear goals and providing actionable solutions. This intervention focused on a Research Funded Project Coordinating Hub's Core Team within a complex programme. Initially planned to engage wider stakeholders, boundary judgement was applied due to time constraints and the sensitivity, scale, and complexity of the topic. The Core Team plays a pivotal role in programme success, collaborating with diverse internal and external stakeholders, making EDI integration crucial for daily activities. Senior leadership internally acknowledged this as a complex and challenging work area.

SYSTEM OF INTEREST

The project engaged members of the Core Team, reflecting different stakeholder groups and roles within the team. Though conducted on a relatively small scale, it included representatives from various positions. The aim was facilitating action learning and participatory assessment of embedding EDI in project and individual practice, engaging stakeholders in identifying and understanding challenges whilst exploring solutions through collaboration and reflection.

APPROACH TAKEN

A Soft and Critical Systems approach combining Soft Systems Methodology (SSM) and Critical Systems Heuristics (CSH) framework was undertaken to collaboratively explore challenges faced by the project team in embedding EDI. SSM methodology supported exploring multiple worldviews within the team, enabling deeper understanding of the problem space and potential improvement areas. The CSH framework guided discussions and surfaced individual perceptions, helping identify underlying assumptions and perspectives that may influence decision-making around EDI initiatives.

MODELS AND INSIGHTS DEVELOPED

Two SSM Conceptual Models were developed with numerous activities constituting a purposeful whole. Ten individual Root Definitions (RDs) were created, enabling everyone to see different perspectives and insights. Each RD was validated by the BATWOVE model, helping understand perspectives more holistically. A collaborative intervention focusing on creating an EDI framework was designed with core team members. The CSH analysis revealed team members' enthusiasm and commitment to be involved in designing EDI initiatives, emphasising the need for collaborative

approaches and appreciation of diverse perspectives, skills, and experiences each team member brings.

KEY INTERVENTIONS UNDERTAKEN

The project aimed to facilitate action learning and participatory assessment through three key objectives:

Conducting Interviews: Using qualitative approaches to delve into challenges and factors related to EDI principles, focusing on rich pictures and allowing deep exploration to produce a comprehensive factors list.

Collaboratively Agreeing on Solutions: Participants worked together to agree on potential solutions grounded in thorough understanding of the problem space and its systemic context, designing a conceptual model for the proposed solution.

Proposing Recommendations: Based on gathered insights and collaborative team efforts, recommendations were proposed to address identified challenges and improve EDI principles integration.

RESULTS

In terms of organisational impact, findings and recommendations can support EDI internal evaluation. As the programme was in its final stage, findings from this study may inform future EDI planning for similar work areas. The process proved valuable despite not yet reaching the SSM stage where action has been taken to test the model in the real world. A simplified summary of the study was included in the Project's EDI Spotlight report as a Case Study 2 on page 47 and can be accessed at: <https://ce-hub.org/wp-content/uploads/2025/03/2024ESAE043-NICER-Programme-EDI-report-FINAL.pdf>

Key recommendations emerged: Team members should undertake an EDI audit to establish a baseline with specific measurable areas, ensuring EDI considerations are integrated into the project's narrative and activities rather than being afterthoughts, emphasising clear commitment and accountability for implementation. Acknowledging that expertise is distributed among team members rather than confined to one individual is crucial, underscoring the importance of collaborative problem-solving approaches and incorporating multiple worldviews into EDI toolkit development.

AFTERTHOUGHTS & OTHER METHODS THAT MIGHT HAVE ASSISTED

Although VSM was not initially used in the primary methodology, I later employed it as a diagnostic tool alongside CSH to identify key diagnostic points and inform interventions aimed at fostering a more inclusive and cohesive working environment. The VSM diagnostic insights derived from individual CSH interviews proved particularly valuable.

The individual CSH interviews encouraged team members to reflect critically on current practices and propose meaningful changes. This participatory approach created a sense of ownership among the team whilst empowering individuals to actively

contribute to EDI initiatives. These insights were aligned with VSM principles, ensuring EDI strategies were both practical and sustainable.

The VSM analysis identified areas where the team's structure and processes could better support EDI. Key findings highlighted the need to move from top-down decision-making to a more inclusive model where all levels contributed to EDI decisions. Gaps in feedback mechanisms were identified, leading to recommendations for developing open channels for continuous dialogue about EDI practices, resonating with VSM's emphasis on creating adaptive and responsive systems.

The VSM diagnostic approach can help bridge strategic thinking with actionable recommendations, such as conducting a baseline EDI audit to establish benchmarks and implementing role-specific EDI expectations to ensure clarity and accountability. Together, the insights from SSM, CSH, and VSM diagnostics provide a comprehensive framework for understanding and addressing EDI challenges.