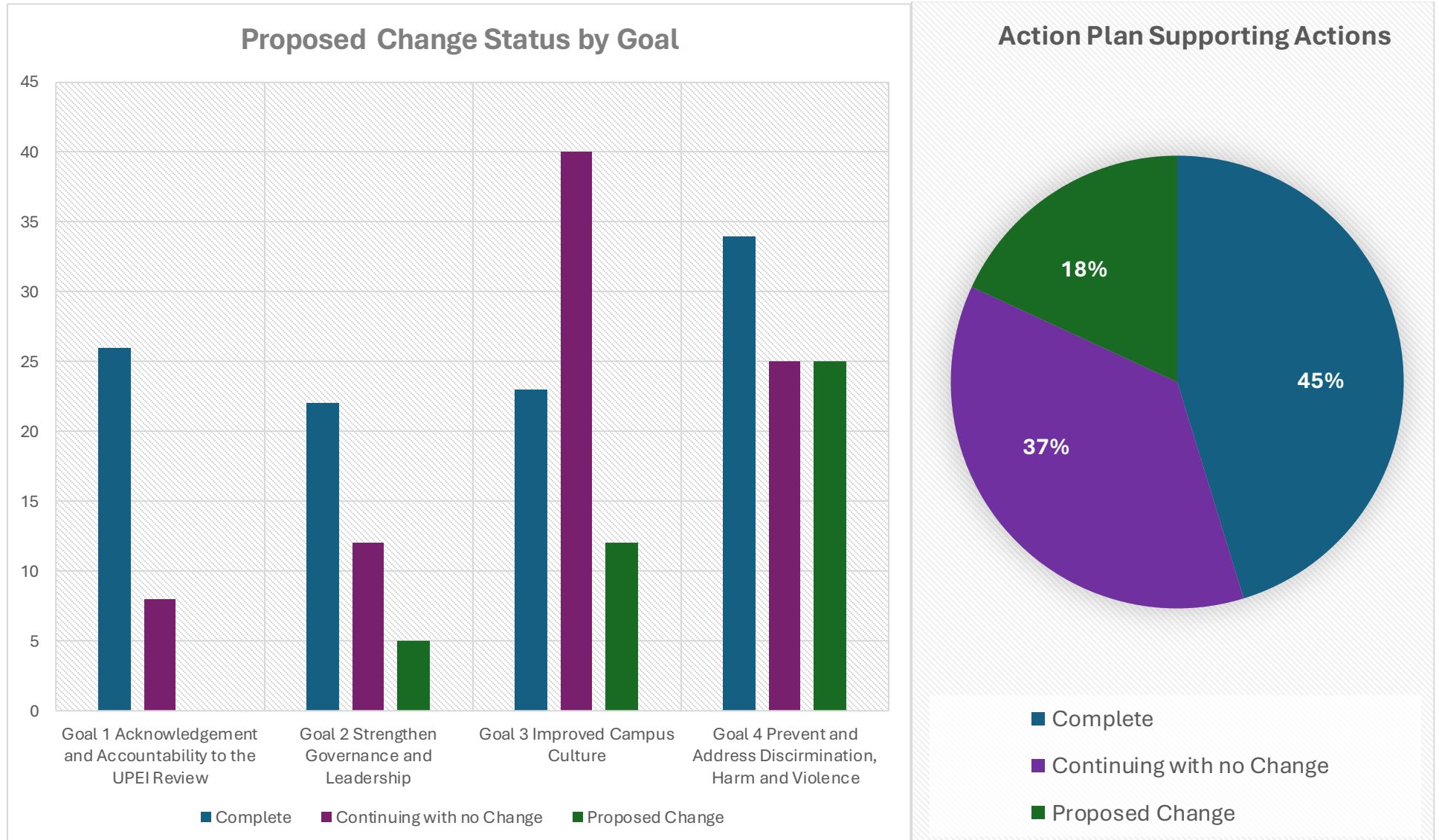


## Summary of Revisions

Overall, there are proposed changes to the timeline and/or language of approximately 18% of the total Supporting Actions in the Action Plan.

A summary of the proposed changes can be found below in the chart (s) below and a more detailed explanation of each Supporting Action Change is included at the end of this document, which provides a change status for all Supporting Actions defined in the Action Plan.



## Summary of Proposed Change to the UPEI Action Plan

Goal 1: Acknowledge and Accountability to the UPEI Review		Goal 2: Strengthen Governance and Leadership	
The linkage to the PEI Advisory Council of the Status of Women Equality Report Card is being re-reviewed. The university will be consulting with the council and other stakeholders to clarify the nature of this commitment.	Impacting 1 Supporting Action	Adjustment to how the leadership training strategy will be implemented, including removing the commitment to creating a formal Leadership Training Office and extending the timeline of the implementation (including the development of a training calendar and process to track participation) through to Year 5.	Impacting 5 Supporting Actions
Goal 3: Improved Campus Culture		Goal 4: Prevent and Address Discrimination, Harm and Violence	
Combining like actions relating to a continued commitment to listening and idea sharing to allow for efficiencies in implementation	Impacting 3 Supporting Actions	Revisions to the actions relating to the replacement of the FTP to reflect only those commitments completely within the University's control	Impacting 6 Supporting Actions
Revising "360-degree" reference to align with performance review process approved by Board of Governors	Impacting 2 Supporting Actions	Revisions to remove dependencies on the new Harassment and Discrimination Policy	Impacting 8 Supporting Actions
Adjustment to the cadence to the Employee Engagement Survey	Impacting 3 Supporting Actions	Removal of requirement for another move of the SVPRO office	Impacting 1 Supporting Action
Revision to the timeline and language of the commitment regarding staff classification	Impacting 1 Supporting Action	Extending the timeline to making the Preventing Sexualized Violence course mandatory for staff and faculty	Impacting 2 Supporting Actions
Updating the timeline for implementation of performance reviews	Impacting 1 Supporting Action		
Revision to the frequency of EDI training for Security Services	Impacting 1 Supporting Action	Adjusting the timeline for the implementation of the Sexual Violence Policy to indicate that it will begin immediately following Board approval of the revised policy	Impacting 9 Supporting Actions
Revision to remove dependency on the new Harassment and Discrimination Policy	Impacting 1 Supporting Action		

**GOAL 1      ACKNOWLEDGE AND DEMONSTRATE ACCOUNTABILITY FOR THE ISSUES WITHIN THE UPEI REVIEW**

**Action 1      Publish the UPEI Review and acknowledge the serious issues within in**

ADDRESSING ISSUES AND RESPONSIBILITY	TIMELINE	SUPPORTING ACTIONS	STATUS/CHANGE RECOMMENDATION	RATIONALE FOR CHANGE
<b>1.1.1 Publicly share the UPEI Review</b> President Chair, Board of Governors	Year 0	1.1.1 A copy of the UPEI Review has been shared. As noted in the Review, redactions were necessary. Redactions were made strictly to comply with privacy and legal requirements, as recommended by external legal experts.	Completed	N/A
	Year 0	1.1.2 Information in the Review covered feedback that was both current and going back decades. To address this constraint, the interim President conducted 16 listening sessions with all facets of campus to get contemporaneous information	Completed	N/A
<b>1.1.2 Apologize for harms caused</b> President Chair, Board of Governors	Year 0	1.1.2.1 An apology was made to UPEI campus members through campus communications, media interviews, and in person by the interim President and the Board Chair.	Completed	N/A
	Year 0	1.1.2.2 The Action Plan contains an explicit apology, which acknowledges harms and the bravery of those who have spoken out, as well as a commitment to action that is signed by the Board Chair and Interim President. The	Completed	N/A

		apology and acknowledgement are meant to signal a commitment to listen and learn, as a step towards reconciliation.		
<b>1.1.3 Provide additional supports to the campus community</b> President	Year 0	1.1.3.1 In the period following the release of the Review, increased information on UPEI's Employee and Family Assistance Program services and supports was provided and additional in-person on campus counselling supports were provided.	Completed	N/A
		1.1.3.2 More information on how to make disclosures and reports of harassment or discrimination regarding senior leaders was shared with campus members.	Completed	N/A
		1.1.3.3 UPEI will increase staff capacity in SVPRO, EDI Office, and Student Affairs to provide increased levels of support in these areas as identified within the UPEI Review.	Completed	N/A
<b>1.1.4 Consult campus on addressing harms</b> Chair, Board of Governors Board of Governors President	Year 0	1.1.4.1 The UPEI Action Plan Advisory Group was formed to provide both a campus and broader community lens for consultation on how best to address harms	Completed	N/A
		1.1.4.2 The interim President held townhalls and a series of campus listening sessions	Completed	N/A

		1.1.4.3	The Chair of the Board, Board and President have met with survivors who have connected with us so that UPEI can learn from their experiences	Completed	N/A
<b>1.1.5 Reinforce oversight and monitoring mechanisms for improved accountability of leaders</b> President Chair, Board of Governors	Year 0-1	1.1.5.1	Obtain an external review of Board governance, including a review of processes for recruitment of new Board members	Completed	N/A
	Year 1	1.1.5.2	Conduct a review of senior leadership structure including ensuring duties and responsibilities are matched to levels of authority and clear accountability is assigned	Completed	N/A
		1.1.5.3	Develop a 360-degree performance review process for President and Senior Executive Team	Completed	N/A

**GOAL 1 ACKNOWLEDGE AND DEMONSTRATE ACCOUNTABILITY FOR THE ISSUES WITHIN THE UPEI REVIEW**

**Action 2 Commit to addressing all the recommendations within the UPEI Review**

ADDRESSING ISSUES AND RESPONSIBILITY	TIMELINE	SUPPORTING ACTIONS	STATUS/CHANGE RECOMMENDATION	RATIONALE FOR CHANGE
1.2.1 Publicly state UPEI's commitment to change and accountability	Year 0	1.2.1.1 The Action Plan contains a public statement committing to accountability and the UPEI Review recommendations, as well as additional components developed through feedback provided by the	Completed	N/A

President Chair, Board of Governors			Action Plan Advisory Group and through campus listening sessions.		
		1.2.1.2	Through both the Action Plan Advisory Group and the listening sessions, the University has consulted with the community and used the consultation feedback to inform response to the UPEI Review recommendations within the Action Plan	Completed	N/A
<b>1.2.2 Develop an Advisory Group for input on plan development</b> President	Year 0	1.2.2.1	UPEI issued a call for expressions of interest for community members to participate on the Action Plan Advisory Group with goal of broad community representation.	Completed	N/A
		1.2.2.2	The University used an external facilitator to consult with the Advisory Group to gather feedback and provide guidance to help inform actions.	Completed	N/A
		1.2.2.3	Throughout the process, information on the progress of the Advisory Group was shared with campus.	Completed	N/A
<b>1.2.3 Engage in ongoing consultation</b> President Senior Executive Team	Year 0-5	1.2.3.1	UPEI leadership will maintain an enhanced level of consultation with the campus community. These consultations will include opportunities like the previously held town halls and campus listening sessions, as well as new employee and student engagement channels.	No proposed change	N/A

	Year 2-3	1.2.3.2 Develop and deliver a mid-plan consultation to gauge campus and community members' input on progress.	No proposed change	N/A
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## GOAL 1 ACKNOWLEDGE AND DEMONSTRATE ACCOUNTABILITY FOR THE ISSUES WITHIN THE UPEI REVIEW

### Action 3 Develop an Action Plan to guide the cultural change needed at UPEI

ADDRESSING ISSUES AND RESPONSIBILITY	TIMELINE	SUPPORTING ACTIONS	STATUS/CHANGE RECOMMENDATION	RATIONALE FOR CHANGE
<b>1.3.1 Publicly state UPEI's commitment to change and accountability</b> Chair, Board of Governors Senior Executive Team	Year 0	1.3.1.1 Utilize feedback from town halls, campus listening sessions, and Advisory Group, and consultations with internal and external partners to guide the development of the Action Plan.	Completed	N/A
		1.3.1.2 Share draft Action Plan publicly for feedback and finalize after consideration of community feedback as well as feedback from the UPEI Senate and Board.	Completed	N/A
<b>1.3.2 Draft Action Plan and share with community</b> President Chair, Board of Governors Senior Executive Team	Year 0	1.3.2.1 Post the draft Action Plan on the UPEI website in early January 2024	Completed	N/A
		1.3.2.2 Finalize the Action Plan after consideration of the community feedback as well as feedback from the UPEI Senate and Board	Completed	N/A

<b>1.3.3 Identify resources needed for implementation</b> President Senior Executive Team	Year 0	1.3.3.1 Identify initial human resources and budget needs related to the Action Plan and seek funding support	Completed	N/A
<b>1.3.4 Create a Board of Governors Campus Culture Oversight Committee</b> Board of Governors	Year 0	1.3.4.1 Create Campus Culture Oversight Committee to oversee implementation of Action Plan. This will include receiving annual audit reports on the implementation progress of the Action Plan.	Completed	N/A

**GOAL 1 ACKNOWLEDGE AND DEMONSTRATE ACCOUNTABILITY FOR THE ISSUES WITHIN THE UPEI REVIEW**

**Action 4 Engage in annual audits of the progress of the Action Plan**

ADDRESSING ISSUES AND RESPONSIBILITY	TIMELINE	SUPPORTING ACTIONS	STATUS/CHANGE RECOMMENDATION	RATIONALE FOR CHANGE
<b>1.4.1 Select auditor</b> Board of Governors	Year 1	1.4.1.1 Select auditors with EDI competence based on recommendations of the Finance and Audit Committee and in consultation with Government of PEI	Completed	N/A
		1.4.1.2 Consider an audit organization that has access to a resource base	Completed	N/A

		outside PEI as well as experience within post-secondary education.		
<b>1.4.2 Develop audit schedule and process</b> President Senior Executive Team	Year 1-5	1.4.2.1 Develop audit schedule and process to support annual audits	No proposed changes	N/A
		1.4.2.2 Develop annual implementation plans considering the relevant goals of the PEI Advisory Council of the Status of Women Equality Report Card such as reconciliation with Indigenous people, and support for those experiencing sexualized and other gender-based violence	Under Review	The university will consult with the council and other stakeholders as to the nature of this item and the best way to move forward with it.
		1.4.2.3 Align internal resources needs to support the audit	No proposed changes	N/A
<b>1.4.3 Assign annual audits and receive results</b> President Board of Governors	Year 2-5	1.4.3.1 Carry out annual audits (aligned with UPEI fiscal year) based on audit schedule	No proposed changes	N/A
		1.4.3.2 Make the audit results public	No proposed changes	N/A
		1.4.3.3 Conduct the first audit following the completion of Year 1 and thereafter annually	No proposed changes	N/A

## GOAL 2 STRENGTHEN UPEI'S GOVERNANCE AND LEADERSHIP STRUCTURE

**Action 1** Use a transparent and consultative process, and proper due diligence in the selection and hiring of a new University President

ADDRESSING ISSUES AND RESPONSIBILITY	TIMELINE	SUPPORTING ACTIONS	STATUS/CHANGE RECOMMENDATION	RATIONALE FOR CHANGE
<b>2.1.1 Develop and share full job description for President and Vice-Chancellor position</b> Presidential Search Committee	Year 0	2.1.1.1 Build the need to champion work on culture improvements (as outlined in the UPEI Review) within the job description for the next President	Completed	N/A
		2.1.1.2 Build the following components into the selection criteria for the next President: <ul style="list-style-type: none"> <li>- Commitment to equity, diversity, and inclusion</li> <li>- Deep understanding of workplace fairness and harassment</li> <li>- Track record of success in implementation of projects to advance EDI in meaningful ways</li> <li>- Commitment to reconciliation and Indigenization</li> <li>- Organizational change experience and desire to champion change</li> <li>- Ethics, transparency, and integrity</li> </ul>	Completed	N/A

		2.1.1.3	Post a detailed job description on the UPEI website for full transparency	Completed	N/A
<b>2.1.2 Presidential search communications</b> Chair, Presidential Search Committee	Year 0-1	2.1.2.1	Communicate information and updates regularly about the selection process to the campus community	Completed	N/A
<b>2.1.3 Candidate presentations</b> Chair, Presidential Search Committee	Year 0	2.1.3.1	Provide the campus community with feedback opportunities, which will include campus presentations by shortlisted candidates	Completed	N/A
		2.1.3.2	Provide campus members with the opportunity to give anonymous feedback on shortlisted candidates	Completed	N/A
<b>2.1.4 Candidate response to UPEI Review</b> Presidential Search Committee	Year 0	2.1.4.1	Require shortlisted candidates to provide a response to the UPEI Review recommendations	Completed	N/A
		2.1.4.2	Require shortlisted candidates to provide a response with respect to the draft Action Plan	Completed	N/A
<b>2.1.5 Vetting candidates</b> Presidential Search Committee	Year 0	2.1.5.1	Ensure that the next President has been adequately vetted	Completed	N/A

## GOAL 2 STRENGTHEN UPEI'S GOVERNANCE AND LEADERSHIP STRUCTURE

### Action 2 Refresh the UPEI Board of Governors with new members and create an enhanced accountability and oversight structure

ADDRESSING ISSUES AND RESPONSIBILITY	TIMELINE	SUPPORTING ACTIONS	STATUS/CHANGE RECOMMENDATION	RATIONALE FOR CHANGE
<b>2.2.1 Fill Board of Governors' vacancies</b> Board of Governors	Year 0	2.2.1.1 Adopt good governance practices to ensure board policies, practices, and recruitment create conditions aimed at increasing Board diversity	Completed	N/A
		2.2.1.2 Inform Board-member-appointing bodies of skill, demographic, and experience gaps	Completed	N/A
<b>2.2.2 Develop skills matrix for competencies and representation</b> Board of Governors President	Year 0	2.2.2.1 Use the newly developed skills matrix to ensure a balanced representation of skills, expertise (including EDI), experience, demographics (including race, gender, and age), and other relevant considerations in relation to the composition of the Board of Governors	Completed	N/A
		2.2.2.2 Make the Board recruitment process for UPEI Board appointments more transparent by making it public, and publicizing the opportunity	Completed	N/A

<b>2.2.3 Review Board Governance</b> Board of Governors President	Year 0-1	2.2.3.1	Obtain an external review on Board governance	Completed	N/A
		2.2.3.2	Make changes in board procedures resulting from the review recommendations public	Completed	N/A
<b>2.2.4 Increase Board oversight</b> Board of Governors President	Year 0-2	2.2.4.1	Review Terms of Reference of Board Standing Committees to ensure that Board oversight responsibilities are adequately met	Completed	N/A
		2.2.4.2	Create a Campus Culture Oversight Committee of the Board to oversee implementation of the UPEI Action Plan and EDI Strategy progress monitoring	Completed	N/A
		2.2.4.3	Enhance Board Training	No proposed changes	N/A
<b>2.2.5 New reporting mechanisms to inform the Board</b> Board of Governors President VP People and Culture	Year 1-2	2.2.5.1	Report to the Human Resources Committee of the Board on terminations and resignations, and on whether any such terminations or resignations have associated NDAs	Completed	N/A
		2.2.5.2	Develop process to inform the Campus Culture Oversight Committee if areas within UPEI demonstrate concerning trends of harassment or discrimination	No proposed changes	N/A

<b>2.2.6 Develop a Board policy for appointing acting and interim administrators</b> Chair, Board of Governors President	Year 1	2.2.6.1	Develop and implement a policy on the appointment of acting and interim administrators for the roles of president and senior administrators	Completed	N/A
		2.2.6.2	Make the policy accessible to the campus community	Completed	N/A

## **GOAL 2 STRENGTHEN UPEI'S GOVERNANCE AND LEADERSHIP STRUCTURE**

### **Action 3 Improve onboarding and training of UPEI Board of Governors and Senate members**

<b>ADDRESSING ISSUES AND RESPONSIBILITY</b>	<b>TIMELINE</b>	<b>SUPPORTING ACTIONS</b>	<b>STATUS/CHANGE RECOMMENDATION</b>	<b>RATIONALE FOR CHANGE</b>	
<b>2.3.1 Develop orientation and training materials</b> Board of Governors Senate	Year 1-2	2.3.1.1	Provide training on governance and other relevant expertise to the Board and Senate	No proposed changes	N/A
		2.3.1.2	Provide EDI training to the Board and Senate	No proposed changes	N/A
<b>2.3.2 Develop training schedule and tracking process</b> Board of Governors Senate	Year 1-2	2.3.2.1	Identify institutional resources to support the development of training programs and related materials	No proposed changes	N/A
		2.3.2.2	Develop a training plan for Board of Governors and Senate	No proposed changes	N/A

		2.3.2.3	Develop a process to track training participation of those in governance-related roles	No proposed changes	N/A
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## GOAL 2 STRENGTHEN UPEI'S GOVERNANCE AND LEADERSHIP STRUCTURE

### Action 4 Develop a UPEI Leadership Training Program

ADDRESSING ISSUES AND RESPONSIBILITY	TIMELINE	SUPPORTING ACTIONS	STATUS/CHANGE RECOMMENDATION	RATIONALE FOR CHANGE	
<b>2.4.1 Develop training program for UPEI leaders</b> President VP People and Culture	Year 1-2	2.4.1.1	Assess training needs of campus leadership and leverage internal resources, including UPEI's professional development team, to help address these needs	Completed	N/A
		2.4.1.2	Consider potential training topics such as active listening, EDI, cultural competencies, mitigating unconscious bias, implementing policies and processes effectively, conflict management, emotional intelligence, and bystander training	Completed	N/A
	Year 2	2.4.1.3	Develop a leadership training strategy	Update Timeline to Year 2-5	The framework established under Action 2.4.1.1 identified two complementary components of a leadership development approach: a <b>Leadership Essentials Program (LEP)</b> and a <b>Strategic Leadership Program</b> . Following the

				<p>development of this framework, work has commenced on the Leadership Essentials Program, which is designed to address priority learning areas identified in the Action Plan and to reach the largest and most diverse group of leaders across the institution.</p> <p>The Leadership Essentials Program incorporates several training initiatives that align directly with institutional priorities, including conflict resolution, change management and equity, diversity, and inclusion training. Given the scope and impact of this foundational program, a phased approach is required to ensure quality development, effective implementation, and sustainability.</p> <p>As a result, the leadership training strategy will be developed and refined over a multi-year period, with initial emphasis on the Leadership Essentials Program before progressing to the Strategic Leadership Program. This necessitates extending the timeline to Years 2-5.</p>
Year 3	2.4.1.4	Create a Leadership Training Office to implement the leadership training strategy	<p>Update language to "Implement the leadership training strategy"</p> <p>Update Timeline to Year 3-5</p>	<p>The Leadership Essentials Program will be developed and implemented within the Human Resources Office. Adequate time is required to design the core curriculum, engage internal and external expertise, and establish delivery and evaluation mechanisms. Initial implementation of the Leadership Essentials Program is planned for Year 3. Following successful implementation and evaluation of the Leadership Essentials Program, development of the Strategic Leadership Program will begin in Year 4, with implementation occurring in Years 4-5. This staggered approach reflects current resource capacity and ensures that both programs are developed intentionally and delivered effectively. As a result, Action 2.4.1.5 is no longer required as a separate initiative.</p>
Year 4-5	2.4.1.5	The Leadership Training Office to administer the leadership training program	Remove this Supporting Action	Commitment will be achieved as part of 2.4.1.4 (see comment above)

<b>2.4.2 Develop training schedule and tracking process</b> VP People and Culture	Year 3	2.4.2.1 Develop a training calendar	Update Timeline to Year 3-5	Development of a comprehensive leadership training calendar will commence in Year 3, aligned with the implementation of the Leadership Essentials Program. The calendar will evolve over time to incorporate offerings associated with the Strategic Leadership Program as it is developed and implemented in Years 4-5.
		2.4.2.2 Develop a process to track participation in leadership training	Update Timeline to Year 3-5	A process to track participation in leadership training will be established in Year 3 in conjunction with the launch of the Leadership Essentials Program. This process will be refined and expanded as additional leadership programming is introduced through the Strategic Leadership Program in Years 4-5, ensuring consistent data collection and reporting across all leadership development initiatives.

## GOAL 2 STRENGTHEN UPEI'S GOVERNANCE AND LEADERSHIP STRUCTURE

### Action 5 Create a leadership development program for academic administrators

ADDRESSING ISSUES AND RESPONSIBILITY	TIMELINE	SUPPORTING ACTIONS	STATUS/CHANGE RECOMMENDATION	RATIONALE FOR CHANGE
<b>2.5.1 Develop training program for UPEI academic administrators</b> President VP Academic and Research	Year 1-2	2.5.1.1 Create a leadership development program for academic administrators (Deans, Associate Deans and Chairs) that builds effective leadership and management skills, training on EDI, and processes of continual improvement	No proposed changes	N/A

		2.5.12	Develop leadership training to build skills for fostering a healthy workplace such as motivating and inspiring faculty and staff, navigating difficult conversations, preventing burnout, change management, and conflict resolution and mediation	No proposed changes	N/A
		2.5.13	Use program-based learning in program with real-life situations of academic administrators that reflect topics such as discrimination, institutional racism, micro-aggressions, bystander training, and education and harassment	No proposed changes	N/A
<b>2.5.2 Develop training schedule and tracking process</b> VP Academic and Research	Year 1-2	2.5.2.1	Develop institutional resources to support the offering of a leadership development program on a regular schedule, including ongoing seminars for continual improvement	No proposed changes	N/A
		2.5.2.2	Build, through the ongoing process of tracking, a community of colleagues with shared interests and common goals in effective leadership	No proposed changes	N/A

### GOAL 3 IMPROVE UPEI'S CAMPUS CULTURE

#### Action 1 Create a culture of listening at UPEI

ADDRESSING ISSUES AND RESPONSIBILITY	TIMELINE	SUPPORTING ACTIONS	STATUS/CHANGE RECOMMENDATION	RATIONALE FOR CHANGE
<b>3.1.1 Culture of listening for students</b> President VP Academic and Research VP Administration and Finance	Year 1-3	3.1.1.1 Ensure Student Union Executive and Graduate Student Association Executive are introduced to Deans Council and Directors of administrative units to ensure they are equipped to navigate UPEI's structures	No proposed change	N/A
		3.1.1.2 Increase the institutional capacity for student focused data collection and analysis of resulting data to provide insight on student experiences, inform initiatives that address student issues, and help assess outcomes.	No proposed changes	N/A
		3.1.1.3 Seek meaningful feedback from students as to their experience through questions such as inclusive and intercultural learning, perceptions of	No proposed changes	N/A

			institutional values and commitment to EDI, and diversity-related programming		
		3.1.1.4	Develop an integrated system that seeks student feedback and builds initiatives to support student success through follow-up planning, student engagement, and actions arising from student surveys	No proposed changes	N/A
<b>3.1.2 Culture of listening for employees</b> President VP People and Culture	Year 1	3.1.2.1	Provide training on trauma-informed approaches to individuals who handle disclosures	Completed	N/A
		3.1.2.2	Provide active listening training	Completed	N/A
	Year 2	3.1.2.3	Establish accessible channels to provide confidential feedback safety, sexual violence, and harassment and discrimination	No proposed changes	N/A
		3.1.2.4	Regularly seek employee feedback through surveys	No proposed change	N/A
<b>3.1.3 Foster a culture of listening</b> Chair, Board of Governors President	Year 0-5	3.1.3.1	Coordinate with campus partners to foster a campus culture built a commitment to listening and idea sharing	Update language to: "Continue to provide opportunities for campus members to speak about their experiences, provide input, and share ideas, including with the President	Language revised slightly to combine 3.1.3.1, 3.2.4.1, and 3.5.4.2, as the outcomes of these were all similar.

			and Senior Executive Team.”		
		3.1.3.2	Listen to individuals who have suffered harm at the University to learn from their experiences as a way of fostering reconciliation	No proposed changes N/A	
		3.1.3.3	Continue to work with the Indigenous community at UPEI to further our journey of reconciliation	No proposed changes N/A	
<b>3.1.4 Performance reviews and campus feedback</b> Board of Governors President Senior Executive Team	Year 1	3.1.4.1	Develop a process for 360-degree performance review of President	Completed N/A	
		3.1.4.2	Develop a process for 360-degree performance review of the Senior Executive Team	Completed N/A	
	Year 2-5	3.1.4.3	President to implement 360-degree performance reviews of Senior Executive Team	Update language to: President to implement Vice-President performance review process	Action updated to reflect language approved by Board of Governors
		3.1.4.4	Senior Executive Team to ensure performance reviews of Deans, Directors, and Managers are carried out	Timeline updated to Year 5	The University recognizes the importance of timely and effective performance reviews as a cornerstone of accountability, leadership development, and a healthy workplace culture. To ensure the long-term success of UPEI's <i>Action Plan for Building a Culture of Trust, Safety, and Inclusion</i> , it is essential that comprehensive onboarding and leadership development initiatives be established prior to formalizing performance review expectations. This sequencing allows leaders to be fully aligned with institutional policies, collective agreements, equity commitments, and regulatory obligations. Robust onboarding

				<p>builds understanding of university governance and staff frameworks, while leadership training strengthens competencies such as coaching for performance, providing constructive feedback and conducting fair, consistent, and culturally responsive evaluations. These capabilities are particularly important given UPEI's commitments to EDI, psychological safety, and effective labour-management relations.</p> <p>While Year 5 is proposed as the formal deliverable to allow sufficient time for this foundational work, the University acknowledges the strategic importance of this initiative and will advance implementation earlier should progress on onboarding and leadership training permit. Ultimately, this approach supports employee trust and institutional accountability, ensuring that performance management practices promote individual growth while reinforcing organizational excellence. Much like building a strong foundation before constructing a house, investing in leadership readiness first ensures the integrity and sustainability of the entire performance management system.</p>	
		3.1.4.5	Following their first year of service, implement annual 360-degree performance review of President	Update language to: Following their first year of service, implement the President performance review process.	Action updated to reflect language approved by Board of Governors
<b>3.1.5 Improve feedback processes</b> VP People and Culture	Year 1	3.1.5.1	Secure the resources to support employee engagement activities	Completed	N/A
		3.1.5.2	Plan and develop employee engagement survey	Completed	N/A

	Year 2	3.1.5.3 Conduct employee engagement survey	Remove from Year 2	<p>Conducting a comprehensive employee engagement survey is a significant undertaking that involves planning, analysis, communication, and follow-up and implementation. An annual cycle does not allow sufficient time to:</p> <ul style="list-style-type: none"> <li>- Meaningfully analyze and communicate results</li> <li>- Develop and implement action plans</li> <li>- Observe the impact of initiatives before the next survey cycle</li> </ul> <p>Moving to a three-year cycle ensures adequate time for reflection, implementation, and measurable change between surveys. It provides credibility and assurance to the community that we valued their time and feedback and that we take it seriously therefore reducing survey fatigue.</p> <p>Community and Leadership Feedback:</p> <p>Since the release of the 2024 results, the University has actively communicated findings across campus and encouraged departments to identify 1-2 priority areas for action. Feedback has included:</p> <ul style="list-style-type: none"> <li>- Requests for a clear institutional response or roadmap addressing the survey results</li> <li>- Requests for HR support in presenting and discussing results with teams</li> <li>- Hesitation or skepticism from some leaders regarding survey validity</li> <li>- Campus community members have also noted that while feedback opportunities (e.g., townhalls, surveys) are frequent, translating this input into visible action is essential for maintaining trust and momentum.</li> </ul> <p>This Supporting Action was replaced with 3.1.5.5</p>
		3.1.5.4 Establish accessible channels to provide confidential feedback on	No proposed changes	N/A

		safety, sexual violence, and harassment and discrimination		
	Year 3-5	3.1.5.5 Conduct annual employee engagement survey	Update language to "Continue and optimize employee engagement survey as per defined cadence"	See rationale for change to 3.1.4.4. This new language is consistent with that associated with the exit interview and engagement initiatives implementation as well
<b>3.1.6 Exit interviews</b> VP People and Culture	Year 1	3.1.6.1 Develop a process to offer exit interviews for departing employees	Completed	N/A
		3.1.6.2 Develop a process to share aggregate information learned from exit interviews in confidential and appropriate ways	Completed	N/A
		3.1.6.3 Create a position in Human Resources to support exit interview activities	Completed	N/A
	Year 2	3.1.6.4 Implement exit interview process and reporting	No proposed changes	N/A
	Year 3-5	3.1.6.5 Develop a protocol for how exit interview information will be appropriately shared with the EDI and Human Rights department where permitted and relevant	No proposed changes	N/A

		3.1.6.6	Continue and optimize exit interview process	No proposed changes	N/A
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### GOAL 3 IMPROVE UPEI'S CAMPUS CULTURE

#### Action 2 Foster an environment in which employees feel valued

ADDRESSING ISSUES AND RESPONSIBILITY	TIMELINE	SUPPORTING ACTIONS	STATUS/CHANGE RECOMMENDATION	RATIONALE FOR CHANGE
3.2.1 Employee Engagement VP People and Culture Senior Executive Team	Year 0	3.2.1.1 Create and fill a Director of Human Resources position	Complete	N/A
	Year 1	3.2.1.2 Increase staff capacity in the Human Resources department to support employee engagement	Complete	N/A
		3.2.1.3 Plan and develop employee engagement survey	Complete	N/A
		3.2.1.4 Plan and develop initiatives to enhance employee engagement	Complete	N/A
		3.2.1.5 Encourage all managers to recognize contributions made by employees to the University	Complete	N/A
	Year 2	3.2.1.6 Implement employee engagement survey	Remove from Year 2	See rationale for change to 3.1.4.4. This action is replaced with 3.1.5.5
		3.2.1.7 Commence employee engagement initiatives	No proposed changes	N/A

	Year 3-5	3.2.1.8	Continue and optimize employee engagement and recognition processes	No proposed changes	N/A
		3.2.1.9	Use data from employee engagement surveys to inform improvements	No proposed changes	N/A
<b>3.2.2 Development opportunities for employees</b> VP People and Culture VP Academic and Research	Year 1-5	3.2.2.1	Provide staff with enhanced opportunities for training and skills building	No proposed changes	N/A
		3.2.2.2	Enhance faculty development opportunities in teaching and research through the Teaching Learning Centre and Office of Research Services	No proposed changes	N/A
<b>3.2.3 Review staff classification system</b> VP People and Culture	Year 2	3.2.3.1	Examine the staff classification system with the objective of ensuring that all positions are consistently evaluated and properly classified	Update language to: “Examine the current staff classification practices to support fair and consistent role evaluation across the institution.”  Update timeline to Year 2-5	The Classification System Review for non-academic positions at UPEI aims to ensure that the current system accurately reflects the roles, responsibilities, and market competitiveness of its workforce. This review is part of the university’s commitment to maintaining a fair, transparent, and equitable compensation structure, aligning with best practices in higher education. To do this with fidelity, a reasonable time frame extends beyond year two.  Background Classification was first implemented at UPEI in approximately 2003 through an Employment Equity review process using the Aiken Plan Classification System. At that time all unionized and non-unionized staff positions were evaluated. Since that time, CUPE 1870 staff positions continue to be evaluated under the Aiken Plan in accordance with Article 24 of the CUPE 1870 collective agreement. Additionally, non-unionized Management and Professional

				<p>Employee Group positions are also evaluated using the Aiken Plan using an established management point scale.</p> <p>Over time, it becomes essential to periodically reassess the existing system to ensure alignment with current organizational goals, legal requirements, industry standards, and institutional growth. It may also require assessment of other available classification systems to determine if the Aiken Plan continues to meet our institutional needs.</p> <p><b>Pre-System Review Steps (Year 2-3)</b>  Before beginning a formal classification system review, several pre-system review steps are necessary. These steps include:</p> <ul style="list-style-type: none"> <li>▪ consultation and stakeholder engagement</li> <li>▪ data collection and analysis</li> <li>▪ review of the current classification framework</li> <li>▪ assessment of compliance requirements</li> <li>▪ development of review framework.</li> </ul> <p><b>(Years 4-5)</b></p> <ul style="list-style-type: none"> <li>▪ <b>Conduct a Comprehensive System Review:</b> Once the preparatory steps are complete, a full review of the non-academic classification system should be initiated, using the feedback and data collected.</li> <li>▪ <b>Implement Benchmarking Against Industry Standards:</b> The classification system should be compared against similar institutions to ensure competitive pay scales and job descriptions.</li> <li>▪ <b>Enhance Communication and Transparency:</b> Regular updates and clear communication throughout the review process will help manage expectations and maintain trust.</li> </ul>
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<b>3.2.4 Enhance open dialogue</b> President Senior Executive Team	Year 0-5	3.2.4.1 Continue opportunities for campus members to speak about their experiences, provide input, and share ideas, including with the President and Senior Executive Team	Update language to: Continue to provide opportunities for campus members to speak about their experiences, provide input, and share ideas, including with the President and Senior Executive Team.	Language revised slightly to combine 3.1.3.1, 3.2.4.1, and 3.5.4.2, as the outcomes of these were all similar.
<b>3.2.5 Improve feedback processes</b> VP People and Culture	Year 1-5	3.2.5.1 Promote information about supports for campus members in relation to health and wellbeing	No proposed changes	N/A
		3.2.5.2 As they are implemented, share information on new supports and services in EDI and SVPRD that are accessible to campus members	No proposed changes	N/A

### GOAL 3 IMPROVE UPEI'S CAMPUS CULTURE

#### Action 3 Rebuild trust and safety on campus

ADDRESSING ISSUES AND RESPONSIBILITY	TIMELINE	SUPPORTING ACTIONS	STATUS/CHANGE RECOMMENDATION	RATIONALE FOR CHANGE
<b>3.3.1 Improvements to Security Services</b> VP Administration and Finance	Year 0	3.3.1.1 Reinstated the position of Manager of Security Services, and fill position, to provide a dedicated management resource	Completed	N/A
	Year 0-2	3.3.1.2 Hire additional security attendants	Completed	N/A

	Year 1	3.3.1.3	Create and implement an annual staff training plan for Security Services which includes sexual violence and EDI training	Completed	N/A
<b>3.3.2 Review campus safety infrastructure</b> VP Administration and Finance	Year 0-1	3.3.2.1	UPEI Health, Safety, and Environment to provide and promote information to campus members about reporting under occupational health and safety legislation	Completed	
	Year 1-2	3.3.2.2	Promote the methods that university community members can report safety concerns	Completed	
	Year 2-3	3.3.2.3	Review campus safety infrastructure (e.g., lighting, safety poles, and security cameras)	No proposed change	
		3.3.2.4	Review the Campus Accessibility Audit to determine and plan for needs	No proposed change	
		3.3.2.5	Enhance campus safety supports such as UPEI SAFE app	No proposed change	
<b>3.3.3 Provide sexual violence and EDI training for Security Services</b>	Year 2	3.3.3.1	Provide sexual violence and EDI training to Security Services staff on an annual basis	Update language to: Provide sexual violence and EDI training to Security Services staff	Removed "annual" reference in this action.  This training is a part of the Security Training Matrix as a mandatory course to be taken within an employee's probationary period. The frequency of the course will be

VP People and Culture VP Administration and Finance				reviewed regularly by the Security, EDI and SVPRO departments, like other courses offered.
		3.3.3.2	SVPRO to provide training on trauma-informed approaches to receiving disclosures to Security Services staff	No proposed change
<b>3.3.4 Create tracking processes for reporting of sexual violence and harassment and discrimination</b> VP People and Culture	Year 1	3.3.4.1	Track reporting information (including anonymous and third party) through the Sexual Violence Policy	Completed
	Year 3	3.3.4.2	Track reporting information (including anonymous and third party) through the Harassment and Discrimination Policy	Update language to: EDI&HR department will track reporting information (including third party) relating to harassment and discrimination disclosures  Language revised to remove reference to the new Harassment Discrimination Policy to allow it to move forward in advance of the policy being implemented  The word "anonymous" was also removed.

### GOAL 3 IMPROVE UPEI'S CAMPUS CULTURE

#### Action 4 Develop campus training opportunities to promote safe, inclusive work and learning environments

ADDRESSING ISSUES AND RESPONSIBILITY	TIMELINE	SUPPORTING ACTIONS	STATUS/CHANGE RECOMMENDATION	RATIONALE FOR CHANGE
<b>3.4.1 Communicate behavioural obligations</b> President Senior Executive Team	Year 1-5	3.4.1.1 Communicate behavioural obligations and limitations through documents, including the Sexual Violence Policy, Harassment and Discrimination Policy.	No proposed changes	N/A

			Student Code of Conduct, Athletic Club Guidelines, and International Student Orientation Handbook		
<b>3.4.2 Develop on-campus awareness</b> President Senior Executive Team	Year 2-4	3.4.2.1	Put in place the resources needed to support and develop training opportunities, related to building inclusive environments; consider topics such as anti-racism, anti-oppression, unconscious bias, microaggressions, cultural differences, sexual violence including gender-based violence, and harassment and discrimination	No proposed changes	N/A
		3.4.2.2	Ensure training has an equity, diversity and inclusion lens	No proposed changes	N/A
		3.4.2.3	Use a trauma-informed approach to the delivery of training on difficult subjects	No proposed changes	N/A
		3.4.2.4	Consult subject-matter experts for specific and targeted themes and messages	No proposed changes	N/A
		3.4.2.5	Ensure there is capacity to respond to increased need for supports and reporting because of awareness program	No proposed changes	N/A

		3.4.2.6	Provide in-person and on-demand training related to building inclusive environments	No proposed changes	N/A
		3.4.2.7	Provide mechanisms through which campus community members can request training on specific issues	No proposed changes	N/A
<b>3.4.3 Update available training</b> President	Year 3-5	3.4.3.1	Make EDI Training available that reflects how the environment continues to evolve	No proposed changes	N/A
		3.4.3.2	Commit to ongoing improvements to EDI training opportunities	No proposed changes	N/A

### **GOAL 3 IMPROVE UPEI'S CAMPUS CULTURE**

#### **Action 5 Improve campus information sharing and communications processes**

<b>ADDRESSING ISSUES AND RESPONSIBILITY</b>	<b>TIMELINE</b>	<b>SUPPORTING ACTIONS</b>	<b>STATUS/CHANGE RECOMMENDATION</b>	<b>RATIONALE FOR CHANGE</b>
<b>3.5.1 Enhance transparency and information sharing</b> Board of Governors President	Year 1-2	3.5.1.1 Assess adequacy of access to information on academic, financial, and governance decision making by Board and Senate and improve transparency and access where needed	No proposed changes	N/A

		3.5.1.2	Ensure Board of Governors and Senate minutes are posted online after approval	No proposed changes	N/A
	Year 2	3.5.1.3	Review and update in-camera guidelines, to ensure completeness of process	No proposed changes	N/A
<b>3.5.2 Provide information on Board and Senate meetings</b> Chair, Board of Governors President	Year 0	3.5.2.1	Provide communication proactively to the UPEI community regarding Board of Governors and Senate meeting dates, and times, and include methods to attend	Completed	N/A
<b>3.5.3 Improve information sharing</b> President Senior Executive Team	Year 2-5	3.5.3.1	Encourage all departments to make more information accessible about common processes	No proposed changes	N/A
<b>3.5.4 Performance reviews and campus feedback</b> Board of Governors President Senior Executive Team	Year 1-5	3.5.4.1	Enhance information sharing about campus initiatives	No proposed changes	N/A
		3.5.4.2	Provide information to campus on opportunities to take part in planning and idea sharing	Update language to: Continue to provide opportunities for campus members to speak about their experiences, provide input, and share ideas, including with the President and Senior Executive Team.	Language revised slightly to combine 3.1.3.1, 3.2.4.1, and 3.5.4.2, as the outcomes of these were all similar.
<b>3.5.5 Improve feedback processes</b> VP People and Culture	Year 1	3.5.5.1	Review structure and objectives of Marketing and Communications department	Completed	N/A
		3.5.5.2	Assess adequacy of staffing capacity in Marketing and Communication	Completed	N/A

	Year 2	3.5.5.3	Develop a campus communications strategy with focus on better understanding the communications needs of campus audiences, effective communications processes, and collaboration opportunities	No proposed changes	N/A
	Year 3-5	3.5.5.4	Implement the campus communications strategy	No proposed changes	N/A

**GOAL 4 PUT IN PLACE NEW POLICIES AND PROCESSES THAT FOCUS ON PREVENTING AND ADDRESSING DISCRIMINATION, HARM, AND VIOLENCE AT UPEI**

**Action 1 Develop an Equity, Diversity, Inclusion (EDI) and Human Rights department at UPEI**

ADDRESSING ISSUES AND RESPONSIBILITY	TIMELINE	SUPPORTING ACTIONS	STATUS/CHANGE RECOMMENDATION	RATIONALE FOR CHANGE
4.1.1 Create a new EDI and Human Rights department President VP People and Culture	Year 0-1	4.1.1.1 Create a new Equity, Diversity, Inclusion (EDI) and Human Rights Department with three major pillars of responsibility: equity, diversity, and inclusion; sexual violence prevention and response; harassment and discrimination complaints	Completed	N/A
		4.1.1.2 Establish the purpose of the EDI and Human Rights department with the organization chart delineating the roles within the office	Completed	N/A

		4.1.1.3	Director of EDI and Human Rights will attend the Board of Governors Campus Culture Oversight Committee to deliver Equity, Diversity, and Inclusion Strategy progress reports, and annual reporting under the Sexual Violence Policy and Harassment and Discrimination Policy	Completed	N/A
		4.1.1.4	Department will report directly to VP People and Culture	Completed	N/A
	Year 2	4.1.1.5	Develop a protocol, as an alternative pathway, for the Director of EDI and Human Rights Department to report issues directly to the President, and/or to the Chair of the Board of Governors, including conflicts of interest and other serious issues	No proposed changes	N/A
<b>4.1.2 Increase staff capacity in EDI, human rights, and sexual violence prevention</b> President VP People and Culture	Year 0-1	4.1.2.1	Move the EDI and SVPRO offices to a more visible location	Completed	N/A
		4.1.2.2	Hire additional staff to support the new EDI and Human Rights Department	Completed	N/A
		4.1.2.3	Create a new leadership position, Director of EDI and Human Rights to provide oversight and leadership to the Department	Completed	N/A

		4.1.2.4	Create a new administrative assistant position to support the Department	Completed	N/A
		4.1.2.5	Create a new position for sexual violence prevention and response coordination to supplement response capacity and improve prevention and response activities	Completed	N/A
	Year 2	4.1.2.6	Move the SVPRO to an area easily accessible, while providing confidentiality	Remove from plan	The SVPRO office is currently occupying a space that is easily accessible and provides confidentiality. A future move, although possible, is not required for the office to operate effectively.
		4.1.2.7	Work with campus partners to cultivate a focus on prevention and awareness	No proposed changes	N/A
		4.1.2.8	Create additional staff capacity on sexual and gender diversity to lead special projects to make the campus a more welcoming environment for members of the 2SLGBTQIA+ community	Completed	N/A
		4.1.2.9	Create additional staff capacity on anti-racism and cultural diversity to lead special projects to make the campus a more welcoming environment for racialized members of the campus community	Completed	N/A

<b>4.1.3 Administer Harassment and Discrimination Policy</b> Administer a harassment and discrimination policy within the EDI&HR Department VP People and Culture	Year 1-2	4.1.3.1	The EDI and Human Rights Department will be responsible for intake and administration of the new Harassment and Discrimination Policy (once developed)	Update language to: The EDI and Human Rights Department will be responsible for intake and administration of a harassment and discrimination policy  Update timeline to Year 3	Reflects a change for the EDI&HR Department to take on the intake and administration of the current Fair Treatment policy, in advance of the Harassment and Discrimination Policy being implemented.
		4.1.3.2	Create a new position, Human Rights and Equity Advisor, for the intake and administration of the new Harassment and Discrimination Policy	Update language to: Create a new position, Human Rights and Equity Advisor, for the intake and administration of a harassment and discrimination Policy  Update timeline to Year 1-3	Reflects a change for the EDI&HR Department to take on the intake and administration of the current Fair Treatment policy, in advance of the Harassment and Discrimination Policy being implemented.
		4.1.3.3	Communicate to the campus community that the EDI and Human Rights Department is the intake location for harassment, discrimination, and sexual violence reports and complaints	Update timeline to Year 3	Reflects a change for the EDI&HR Department to take on the intake and administration of the current Fair Treatment policy, in advance of the Harassment and Discrimination Policy being implemented.
		4.1.3.4	Use a variety of external investigators	Update timeline to Year 1-3	Reflects a change for the EDI&HR Department to take on the intake and administration of the current Fair Treatment policy, in advance of the Harassment and Discrimination Policy being implemented.
		4.1.3.5	Ensure investigations are procedurally fair	Update timeline to Year 1-3	Reflects a change for the EDI&HR Department to take on the intake and administration of the current Fair Treatment policy, in advance of the Harassment and Discrimination Policy being implemented.

		4.1.3.6	Provide informal resolution services in accordance with the new Harassment and Discrimination Policy	Update language to: Provide informal resolution services Update timeline to: Year 1-3	Reflects a change for the EDI&HR Department to take on the intake and administration of the current Fair Treatment policy, in advance of the Harassment and Discrimination Policy being implemented.
<b>4.1.4 Develop and deliver training</b> President Senior Executive Team	Year 0-1	4.1.4.1	Review initiatives at other post-secondary educational institutions	Completed	N/A
		4.1.4.2	Collaborate with areas of campus with their own EDI efforts	Completed	N/A
		4.1.4.3	Invest in partnership with a comprehensive EDI training partners (i.e., Canadian Centre for Diversity and Inclusion)	Completed	N/A
		4.1.4.4	Create a new position responsible for equity, diversity, and inclusion training and education	Completed	N/A
		4.1.4.5	Create a new position responsible for sexual violence prevention and education	Completed	N/A
		4.1.4.6	Make the online Preventing Sexualized Violence course available to all faculty, staff, and students	Completed	N/A
		4.1.4.7	Make the online Preventing Sexualized Violence course mandatory for all incoming students	Completed	N/A
		4.1.4.8	President will consult with unions on an approach for implementation of the mandatory Preventing	Completed	N/A

		Sexualized Violence course for union members		
	Year 2-3	4.1.4.9 Continue to review established best practices and research to inform the training offered	No proposed changes	N/A
		4.1.4.10 Make the online Preventing Sexualized Violence course mandatory for all faculty and staff	Update timeline to Year 2-4	Course will be communicated as mandatory in Year 3, with a commitment to compliance activities in Year 4.
<b>4.1.5 Leverage feedback and data to inform decision making</b> VP People and Culture	Year 0-1	4.1.5.1 Continue to collect information regarding initiatives, best practices, and research in relation to work of the EDI and Human Rights department	Completed	N/A
		4.1.5.2 Obtain information regarding experiences of other institutions with collection of workforce diversity information to inform future planning	Completed	N/A
	Year 2	4.1.5.3 Take actions to welcome voices from members of underrepresented and marginalized groups to help inform the initiatives of the EDI and Human Rights department	No proposed changes	N/A
	Year 3-5	4.1.5.4 Collect workforce diversity information, guided by best practices, to create baseline information to better inform future decision making in equity, diversity, and inclusion policies and processes	No proposed changes	N/A

<b>4.1.6 Cross-departmental communication to improve supports and services</b> VP People and Culture VP Academic and Research VP Administration and Finance	Year 1-3	4.1.6.1	Work collaboratively with campus partners who provide services to underrepresented or marginalized groups including International Student Office, Accessibility Services, and Student Affairs	No proposed changes	N/A
		4.1.6.2	Work with Human Resources to improve accommodations processes for faculty and staff and make the information easily available	No proposed changes	N/A
		4.1.6.3	Create a permanent EDI in Employment Systems Advisor position to continue to make EDI improvements to employment related processes on an ongoing basis	Completed	N/A
		4.1.6.4	Coordinate processes of student-related investigations among the offices of SVPRO and supports within Students Affairs	No proposed changes	N/A
		4.1.6.5	Formalize cross-departmental coordination in relation to harassment, discrimination, racism, or sexual violence	No proposed changes	N/A
		4.1.6.6	Work collaboratively with Deans/Associate Deans to provide advice and guidance on EDI initiatives led by/within Faculties.	No proposed changes	N/A
<b>4.1.7 Offer informal resolution</b> President	Year 1	4.1.7.1	Build capacity for informal resolution methods applicable to matters under the Sexual	Update language to: Build capacity for informal resolution methods	Language revised to remove reference to the policies to allow it to move forward in advance of the policies being implemented. Update to timeline reflects the plan for the

Senior Executive Team		Violence Policy and a new Harassment and Discrimination Policy	applicable to matters of sexual violence and harassment and discrimination  Update timeline to Year 1-3	EDI&HR department to begin administering the Fair Treatment Policy in Year 3.
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**GOAL 4 PUT IN PLACE NEW POLICIES AND PROCESSES THAT FOCUS ON PREVENTING AND ADDRESSING DISCRIMINATION, HARM AND VIOLENCE**

**Action 2 Create a non-disclosure agreement (NDA) policy based on current legislation**

ADDRESSING ISSUES AND RESPONSIBILITY	TIMELINE	SUPPORTING ACTIONS	STATUS/CHANGE RECOMMENDATION	RATIONALE FOR CHANGE
4.2.1 Create NDA policy Board of Governors President	Year 1	4.2.1.1 Develop a policy that complies with all aspects of the PEI Non-disclosures Agreements Act	Completed	N/A
		4.2.1.2 Commit to not using any 'fact of' language in any necessary NDAs	Completed	N/A
		4.2.1.3 Make the policy easily accessible	Completed	N/A
	Year 2	4.2.1.4 Provide training on Non-disclosure Agreements Act and new policy to Board of Governors, Senior Executive Team, and Deans	No proposed changes	N/A

<b>4.2.2 Report NDA-related terminations and resignations to Board of Governors</b> Board of Governors President VP People and Culture	Year 1	4.2.2.1 Send regular reports to the Board of Governors on terminations and resignations, and if any were associated with an NDA	Completed	N/A
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**GOAL 4 PUT IN PLACE NEW POLICIES AND PROCESSES THAT FOCUS ON PREVENTING AND ADDRESSING DISCRIMINATION, HARM AND VIOLENCE**

**Action 3 Create a Harassment and Discrimination Policy for all members of the UPEI community**

ADDRESSING ISSUES AND RESPONSIBILITY	TIMELINE	SUPPORTING ACTIONS	STATUS/CHANGE RECOMMENDATION	RATIONALE FOR CHANGE
<b>4.3.1 Draft a Harassment and Discrimination Policy to replace the Fair Treatment Policy</b> Board of Governors President Senior Executive Team	Year 0	4.3.1.1 As an interim immediate measure, create a pathway for employees to make confidential disclosures of incidents of harassment and discrimination against senior executive members of the University through an independent third-party expert	Completed	N/A
		4.3.1.2 Instruct the Fair Treatment Advocate to use a variety of investigators in their investigations	Completed	N/A

	Year 1-2	4.3.1.3	Replace the Fair Treatment Policy with a comprehensive Harassment and Discrimination Policy that covers all campus members and reflects the new structure of the EDI and Human Rights Department	Language revised to "Draft a comprehensive Harassment and Discrimination Policy, using a campus-wide consultation process, that covers all campus members and reflects the new structure of the EDI and Human Rights department"	Replacing the Fair Treatment Policy requires that it be removed from the Faculty Association's Collective Agreement and doing so, is not completely in the University's control.  This revised action reflects the University's commitment to do everything in its control to implement a new Harassment and Discrimination Policy, that covers all campus members.
		4.3.1.4	Ensure the new policy incorporates all recommendations of the UPEI Review	No proposed changes	N/A
		4.3.1.5	Ensure the new policy reflects feedback from survivors of harm at the University	No proposed changes	N/A
		4.3.1.6	Ensure the policy is trauma-informed and procedurally fair	No proposed changes	N/A
		4.3.1.7	Ensure the new policy aligns with legislative requirements, such as PEI Occupational Health and Safety Act and Employment Standards Act	No proposed changes	N/A
	Year 3-5	4.3.1.8	Build information about human rights and health and safety obligations applicable to work and clinical placements into the program manuals for students in applicable programs	No proposed changes	N/A
	Year 2-3	4.3.1.9	Request the expressed written consent to include the new Harassment and Discrimination	New proposed action	University cannot take action to implement a new Harassment and Discrimination Policy that will cover all

		Policy in the Faculty Association's collective agreement.		campus members, until the existing Fair Treatment Policy is removed from the Collective Agreement.
<b>4.3.2 Communicate policy to campus</b> President VP People and Culture	Year 2	4.3.2.1 Make the policy easily available to the campus community	Language revised to "Make the policy, that is in effect, easily available to the campus community"  Timeline updated to Year 3	University will commit to this, whether the Fair Treatment Policy or the new Harassment and Discrimination Policy is in effect.  With plans to take on the administration of the Fair Treatment Policy in the interim of a new policy, there is value in this.
	Year 2	4.3.2.2 Create materials to communicate the active policy to UPEI community in easy-to-understand language	Language revised to "Create materials to communicate the policy, that is in effect, to the UPEI community in easy-to-understand language"  Timeline updated to Year 3	University will commit to this, whether the Fair Treatment Policy or the new Harassment and Discrimination Policy is in effect.  With plans to take on the administration of the Fair Treatment Policy in the interim of a new policy, there is value in this.
		4.3.2.3 Develop and deliver training on the new policy	Language revised to "Develop and deliver training on the policy in effect"  Timeline updated to Year 3	University will commit to this, whether the Fair Treatment Policy or the new Harassment and Discrimination Policy is in effect.  With plans to take on the administration of the Fair Treatment Policy in the interim of a new policy, there is value in this.
<b>4.3.3 Applications for harassment and discrimination reporting</b> President VP People and Culture	Year 3	4.3.3.1 Collect information regarding harassment and discrimination complaint management applications/software to assess suitability for UPEI	No proposed changes	N/A

**GOAL 4 PUT IN PLACE NEW POLICIES AND PROCESSES THAT FOCUS ON PREVENTING AND ADDRESSING DISCRIMINATION, HARM AND VIOLENCE**

**Action 4 Finalize and implement UPEI's revised Sexual Violence Policy**

ADDRESSING ISSUES AND RESPONSIBILITY	TIMELINE	SUPPORTING ACTIONS	STATUS/CHANGE RECOMMENDATION	RATIONALE FOR CHANGE
<b>4.4.1 Finalize revisions to the Sexual Violence Policy</b> Board of Governors President	Year 1	4.4.1.1 Finalize revisions to the UPEI Sexual Violence Policy	No proposed changes	N/A
		4.4.1.2 Ensure the new policy is comprehensive and implements all the recommendations of the UPEI Review	No proposed changes	N/A
		4.4.1.3 Ensure the revised policy is trauma-informed, procedurally fair, and conforms to legislative requirements	No proposed changes	N/A
		4.4.1.4 Ensure that the experiences of victims of sexual harassment/assault, including within the context of student residences, are in the revisions to the Policy	No proposed changes	N/A
<b>4.4.2 Implement the new Sexual Violence Policy</b> Board of Governors	Year 0	4.4.2.1 Ensure there is ongoing communication between SVPRO and residence life administration	Completed	N/A

President	Year 1-2	4.4.2.2	Communicate the new policy in a timely manner	Revised timeline to: Following Board approval	These activities require a Board of Governors to have approved policy before they can be started.
		4.4.2.3	Ensure training is provided to the Board, Senate, and Senior Executive Team on the new policy	Revised timeline to: Following Board approval	These activities require a Board of Governors to have approved policy before they can be started.
		4.4.2.4	Make the piloted Sexual Violence Response Team permanent and finalize terms of reference	Revised timeline to: Following Board approval	These activities require a Board of Governors to have approved policy before they can be started.
		4.4.2.5	Strengthen and clarify pathway for respondent support	Revised timeline to: Following Board approval	These activities require a Board of Governors to have approved policy before they can be started.
		4.4.2.6	Whenever possible, provide advance notice of delivery of investigation results to the parties	Revised timeline to: Following Board approval	These activities require a Board of Governors to have approved policy before they can be started.
		4.4.2.7	Provide investigation results to the respondent's internal support provider	Revised timeline to: Following Board approval	These activities require a Board of Governors to have approved policy before they can be started.
		<b>4.4.3 Communicate the policy to campus</b> President VP People and Culture	Year 1	4.4.3.1	Make the policy easily available to the campus community
Year 2-3	4.4.3.2		Create materials to communicate the policy to UPEI community in easy-to-understand language	Revised timeline to: Following Board approval	These activities require a Board of Governors to have approved policy before they can be started.
	4.4.3.3		Develop and deliver training on the new policy	Revised timeline to: Following Board approval	These activities require a Board of Governors to have approved policy before they can be started.
<b>4.4.4 Implement mandatory sexual violence training</b>	Year 0-1	4.4.4.1	Make the online Preventing Sexualized Violence course available to all faculty, staff and students	Completed	N/A

<b>for all campus members</b> President Senior Executive Team		4.4.4.2	Make the online Preventing Sexualized Violence course mandatory for all incoming students	Completed	N/A
		4.4.4.3	President will consult with unions on an approach for implementation of the mandatory Preventing Sexualized Violence course for union members	Completed	N/A
	Year 2-3	4.4.4.4	Make the online Preventing Sexualized Violence course mandatory for all faculty and staff	Update timeline to Year 2-4	Course will be communicated as mandatory in Year 3, with a commitment to compliance activities in Year 4.
<b>4.4.5 Collect statistical information</b> VP People and Culture	Year 0-1	4.4.5.1	Collect statistical information on sexual violence disclosures from a victim-centered lens	Completed	N/A
		4.4.5.2	Implement process to allow monitoring of trends	Completed	N/A
	Year 3	4.4.5.3	Collect information regarding sexual violence complaint management applications/software to assess suitability for UPEI	No proposed changes	N/A

**GOAL 4 PUT IN PLACE NEW POLICIES AND PROCESSES THAT FOCUS ON PREVENTING AND ADDRESSING DISCRIMINATION, HARM AND VIOLENCE**

**Action 5 Establish clear feedback, disclosure, and reporting mechanisms for campus members**

ADDRESSING ISSUES AND RESPONSIBILITY	TIMELINE	SUPPORTING ACTIONS	STATUS/CHANGE RECOMMENDATION	RATIONALE FOR CHANGE
<b>4.5.1 Establish anonymous and confidential feedback channels regarding violence, sexual violence, harassment, and discrimination</b> President Senior Executive Team	Year 2-3	4.5.1.1 Include an explanation of how anonymous and third-party reports will be handled under the new Sexual Violence Policy, Harassment and Discrimination Policy, and updated Violence Prevention Policy	Update language to: Provide an explanation of how third-party disclosures will be handled	Language revised to remove reference to the new Harassment Discrimination Policy to allow it to move forward in advance of the policy being implemented  Removed reference to "anonymous" disclosures
		4.5.1.2 Collect information on electronic reporting and tracking tools	No proposed changes	N/A
<b>4.5.2 Respond respectfully to those who report issues regarding violence, sexual violence, harassment, and discrimination</b> President Senior Executive Team	Year 0-5	4.5.2.1 Review processes regarding violence, sexual violence, harassment, and discrimination to ensure they are designed reflecting principles of safety and respect	No proposed changes	N/A
		4.5.2.2 Create pathways for sexual violence or harassment and discrimination disclosures and complaints that are clear	No proposed changes	N/A