



UNIVERSITY
of Prince Edward
ISLAND

UPEI ACTION PLAN: BUILDING A CULTURE OF TRUST, SAFETY, AND INCLUSION

PROGRESS REPORT - YEAR 0 AND YEAR 1



LAND ACKNOWLEDGEMENT

We acknowledge that the University of Prince Edward Island is located on the unceded and ancestral lands of the Mi'kmaw people, known to them as Epekwitk, a traditional district in the territory of Mi'kma'ki.

ACTION PLAN IMPLEMENTATION OVERVIEW

Implementation Plans

Through the UPEI Action Plan, the University outlined the following goals:

- Acknowledge and demonstrate accountability for the issues within the UPEI Review
- Strengthen UPEI's governance and leadership structure
- Improve UPEI's campus culture
- Put in place new policies and processes that focus on preventing and addressing discrimination, harm, and violence at UPEI.

The UPEI Action Plan documents actions to be implemented over a 6-year period, beginning 2023 and continuing through 2029, building the basic structures and necessary foundational pieces into the early implementation years.

Along with defining Goals, Actions, and Supporting Actions, the UPEI Action Plan also defines the timeline for which each would be implemented. It was understood that many of the defined actions would require significant planning and resources to effectively implement, therefore, many actions are associated with a multi-year timeline commitment.

In contrast, the annual Implementation Plans outline the specific activities to be undertaken and completed within a given year. In addition to providing the basis for the annual audits, these plans serve as work plans, specifying the activities that will be completed to advance the implementation of the Supporting Action during that year.

Overall Implementation Approach

The stated goals serve as the foundation for the actions outlined in the UPEI Action Plan and have consistently shaped the direction and decision-making throughout the implementation. When necessary, activities were revised or timelines extended, ensuring that initiative would be implemented effectively and sustainably and in consideration of resource availability and capacity. In each case, decisions were made with the focus remaining on achieving meaningful outcomes.

The success of this implementation is not solely defined by completing each implementation activity, but also by ensuring that the initiatives are built into the operations of the University moving forward, ensuring a long-lasting impact.

REPORT PURPOSE

This progress report will provide an update on the progress of the Action Plan Implementation in Year 0 (May 1, 2023 – April 30, 2024) and Year 1 (May 1, 2024 - April 30, 2025).

In the spirit of transparency and accountability, the University is committed to report annually on the progress of the implementation of the Action Plan and to the proactive communication of any variations in the work completed, compared to the commitments made in the annual Implementation Plan(s).

The progress outlined within this document will be assessed through the first annual audit, in accordance with the CSAE 3000 audit standard.

Scope of the Progress Report

This report will outline the progress made against the implementation activities defined in the [Year 0 and Year 1 Implementation Plans](#).

The progress summary for each implementation year will include:

- Highlights of the work completed within the year
- A breakdown showing the implementation status of all activities, group by their associated goal from the UPEI Action Plan.

Attached appendices provide detailed status updates and explanation of any changes to scope or timeline for all implementation activities.

Audit

In accordance with the UPEI Review, the implementation of the UPEI Action Plan will be subject to an annual audit. The progress outlined within this document will be assessed through the first annual audit, in accordance with the CSAE 3000 audit standard.

The audit results for this first audit will be finalized and made available by November 1st, 2025.

PROGRESS SUMMARY YEAR 0 (May 1,2023 – April 30, 2024)

Implementation Highlights

Following the release of the UPEI Review in June 2023, the University began working toward fostering a campus culture of trust, safety, and inclusion. The work completed through April 30, 2024, is detailed in the Year 0 Implementation Plan, which outlines several foundational steps in the University's journey to move forward.

As part of this effort, the University acknowledged and took accountability for the issues identified in the UPEI Review by publicly sharing the findings, issuing an apology for the harm caused, and offering support to the campus community. This included the announcement of a new Equity, Diversity, and Inclusion (EDI) and Human Rights department, along with a formal commitment to meaningful change in the development of the UPEI Action Plan.

The development of the Action Plan was a consultative process that involved listening to survivors of harm, hosting campus listening sessions and town halls, and forming the UPEI Action Plan Advisory Group. This group, composed of both campus and broader community stakeholders, played a key role in offering feedback and shaping the direction of the Action Plan.

To ensure strong and representative governance, the University conducted a public recruitment process to fill vacancies on its Board of Governors, with a focus on addressing any gaps in representation and necessary competencies. In addition, the Campus Culture Oversight Committee was established to monitor and guide the implementation of the Action Plan. Demonstrating a further commitment to accountability and oversight, the University obtained an external review of its Board governance practices.

A job description for the position of President and Vice-Chancellor was also developed, emphasizing the importance of leadership in driving cultural change. This position was filled through a transparent and consultative process, which included opportunities for the campus community to engage with and provide feedback on the shortlisted candidates.

The work within Year 0 was focused on foundational activities completed through the 2023-24 fiscal year, and documented in the Year 0 Implementation Plan, ensuring the work could be audited.

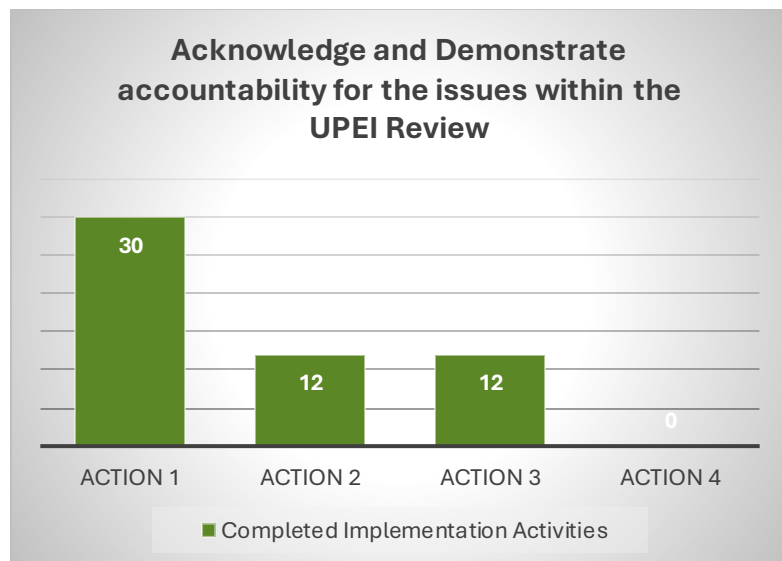
During the development of the plan it was determined that additional activities would be added to the Year 1 Implementation plan to ensure the defined Year 0 Supporting Actions were effectively implemented. These activities are outlined in detail in Appendix A.

Breakdown of Implementation Activities by Goal (Year 0)

The charts below show where the foundational work within Year 0 was focused, in relation to the goals outlined in the Action Plan. A more detailed breakdown of all Year 0 Implementation Activities is provided in Appendix A.

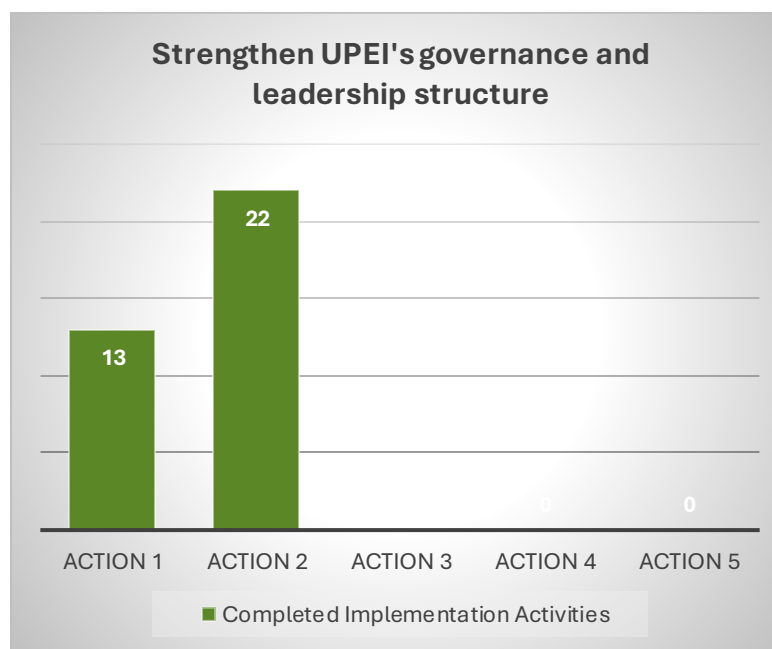
Goal 1: Acknowledge and demonstrate accountability for the issues within the UPEI Review

- **Action 1:** Publish the UPEI Review and acknowledge the serious issues within it
- **Action 2:** Commit to addressing all the recommendations within the UPEI Review
- **Action 3:** Develop an Action Plan to drive the cultural change needed at UPEI
- **Action 4:** Conduct annual audits to monitor the implementation progress of the UPEI Action Plan



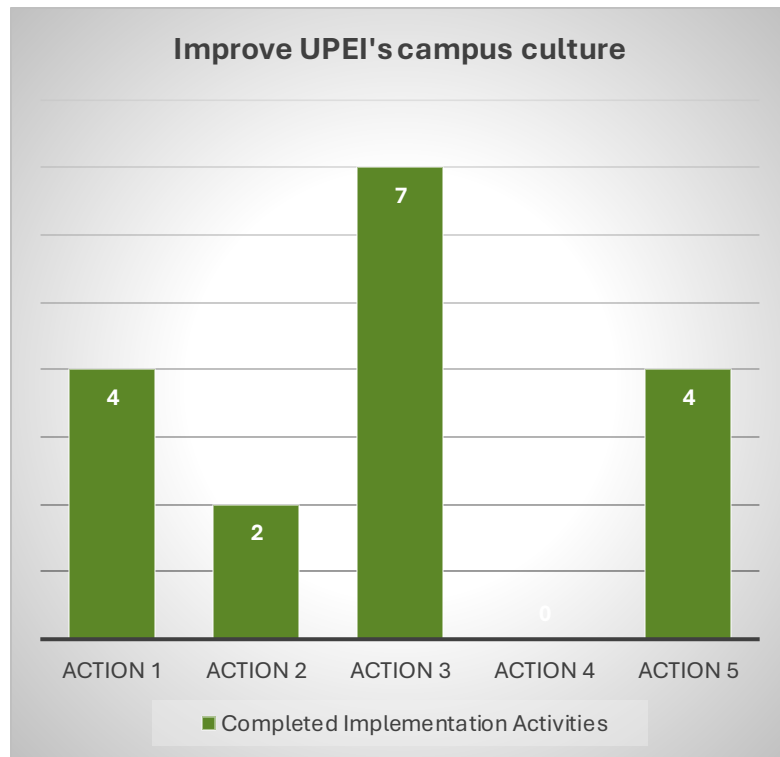
Goal 2: Strengthen UPEI's governance and leadership structure

- **Action 1:** Use a transparent and consultative process and proper due diligence in the selection and hiring of a new University President
- **Action 2:** Refresh the UPEI Board of Governors with new members and create an enhanced accountability and oversight structure
- **Action 3:** Improve onboarding and training of UPEI Board of Governors and Senate members
- **Action 4:** Develop a UPEI leadership training program for those in leadership roles
- **Action 5:** Create a leadership development program for academic administrators



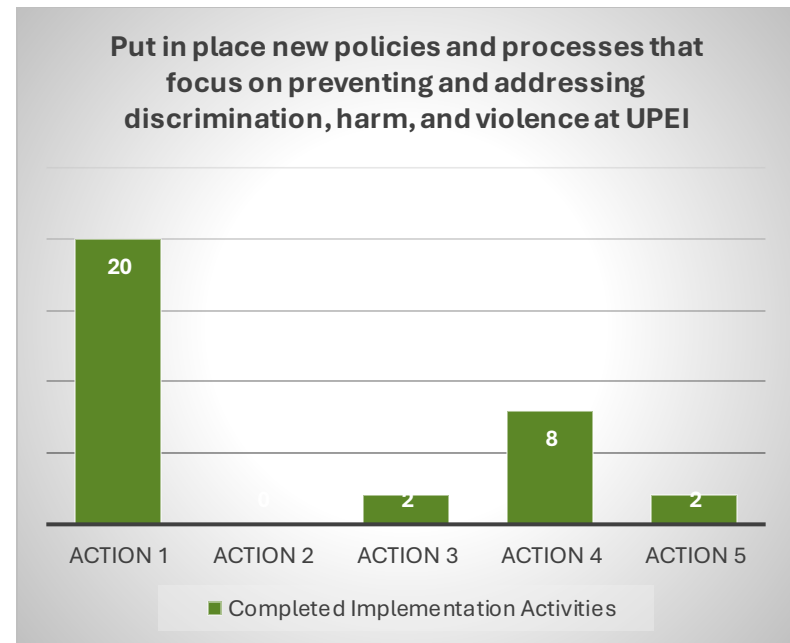
Goal 3: Improve UPEI's campus culture

- **Action 1:** Create a culture of listening at UPEI
- **Action 2:** Foster an environment in which employees feel valued
- **Action 3:** Rebuild trust and safety on campus
- **Action 4:** Develop campus training opportunities to promote safe, inclusive work and learning environments
- **Action 5:** Improve campus information sharing and communication sharing



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 EDI and Human Rights Department at UPEI
- **Action 2:** Create an NDA policy based on current legislation
- **Action 3:** Create a harassment and discrimination policy for all members of the UPEI community
- **Action 4:** Finalize and implement UPEI's revised Sexual Violence Policy
- **Action 5:** Establish clear feedback, disclosure, and reporting systems for campus members



PROGRESS SUMMARY YEAR 1 (May 1,2024 – April 30, 2025)

Implementation Highlights

Building on the foundational work established in Year 0, the University advanced into Year 1 of the Action Plan implementation with a continued commitment to reaching the institutional goals defined in the Action Plan. The Year 1 Implementation Plan reflects the University's dedication to embedding meaningful change into the fabric of its operations, policies, and culture.

Through the Action Plan, UPEI committed to putting in place new policies and processes that focus on preventing and addressing discrimination, harm, and violence. Several key institutional policies were introduced or revised. These included the creation of a new Non-Disclosure Agreement (NDA) Policy; policies guiding the Appointment of Acting and Interim University President and Senior Administrators; work to replace the Fair Treatment Policy with a comprehensive Harassment and Discrimination Policy; and an updated Sexual Violence Policy.

The University also prioritized resourcing the newly established Equity, Diversity, Inclusion and Human Rights (EDI-HR) department as well as establishing processes and mechanisms for the department's collaboration and engagement with the campus community.

As part of improving the UPEI culture, efforts were made to create a culture of listening and an environment where employees feel valued. In the fall of 2024, UPEI launched its first Employee Engagement Survey, offering staff and faculty the opportunity to share their perspectives in a safe and structured way. This survey will now occur annually, providing a regular mechanism for accountability and improvement. Managers were also encouraged to implement and equipped with best practices to recognize employee contributions, and

an exit interview process was developed to capture insights from departing staff.

Training was, and will continue to be, a priority within the implementation of the Action Plan. Tailored training plans were developed and delivered to the Board of Governors and Security Services, with both programs including sessions focused on equity, diversity, and inclusion. A Leadership Development Program was launched for academic administrators, and planning began for a new Graduate Supervisors Training Program. The EDI-HR department also offered targeted training sessions on trauma-informed practices for those handling disclosures, as well as active listening training for individuals responding to community concerns.

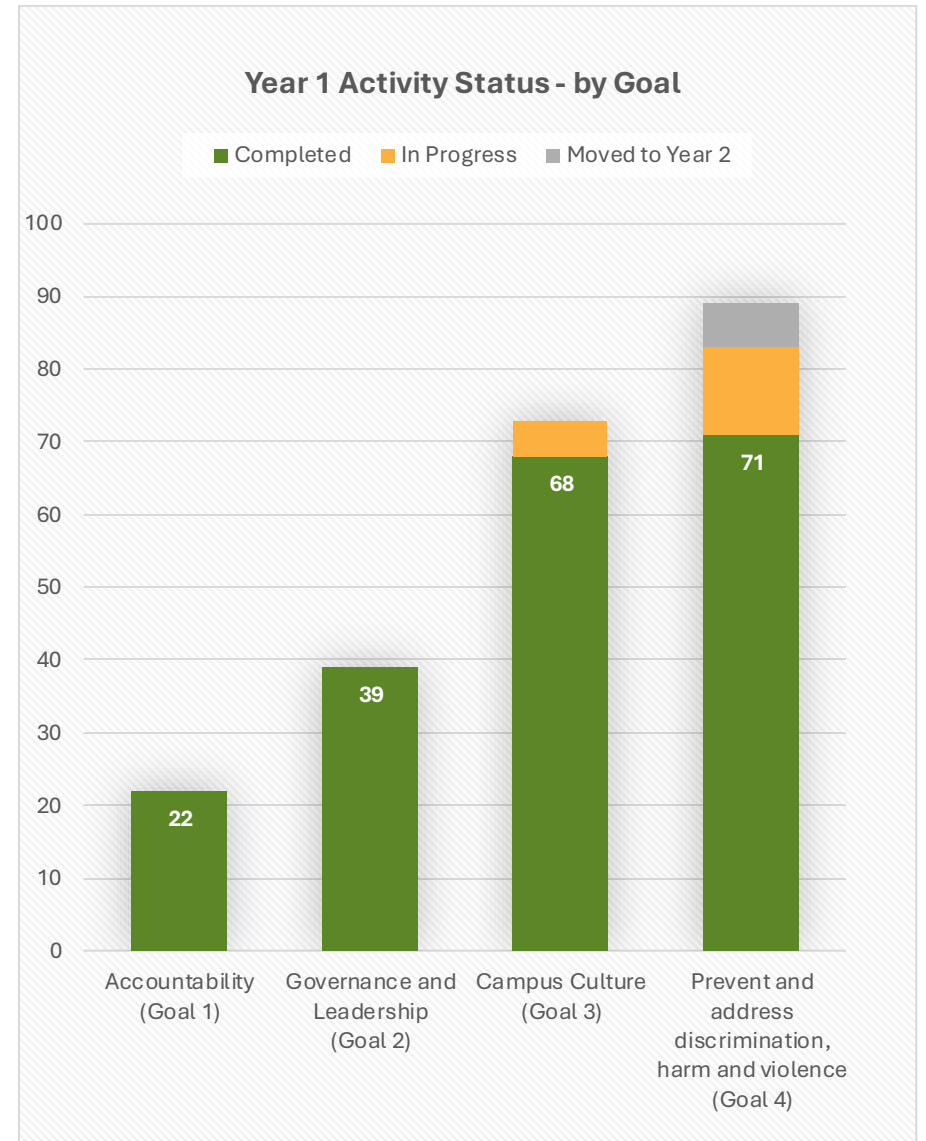
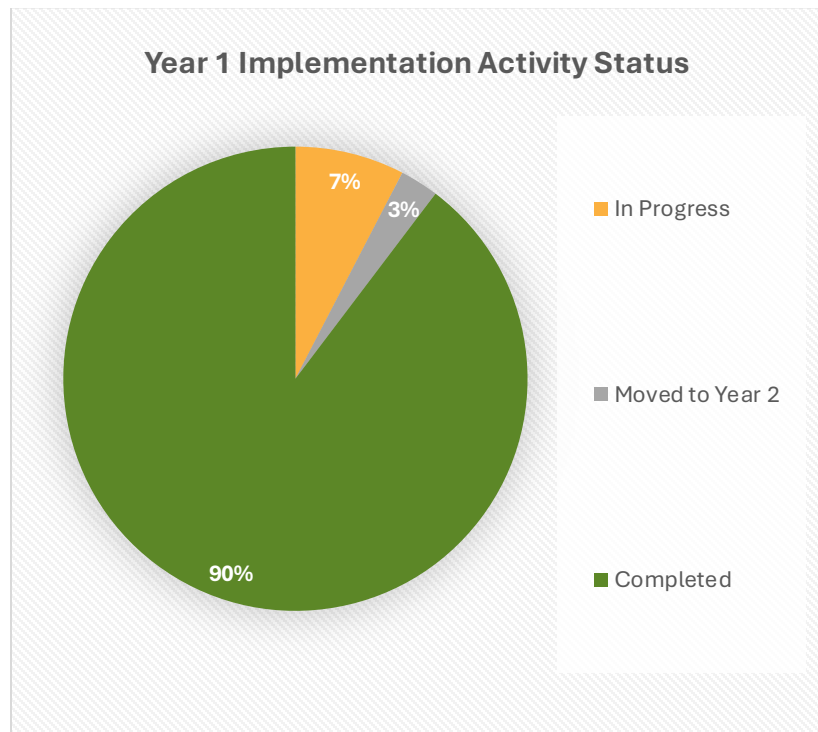
In alignment with the commitment to enhanced oversight and accountability, the University developed a performance review processes for its Vice Presidents and the President. These reviews reflect a significant step toward fostering transparent, constructive, and continuous leadership development.

The Year 1 Implementation Plan was ambitious, a reflection of the high priority placed on it, and the strong commitment demonstrated by the Senior Executive team, as well as the over 20 leaders from across the UPEI campus who were involved directly in its implementation.

There were tremendous accomplishments, and significant progress made during the year.

As shown in the chart below, 90%, a total of 200 implementation activities, were completed in Year 1. A further 7% are In Progress, to be completed in Year 2. Six activities have not yet started and will be moved to Year 2 for completion.

A detailed breakdown of the progress status of all implementation activities from Year 1, as well as a description of any changes made to the scope or timeline of the activities can be found in Appendix B.

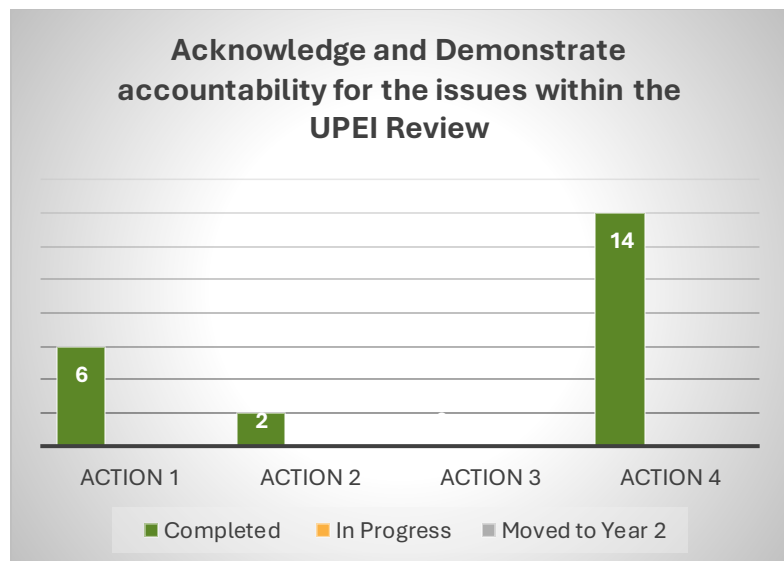


Breakdown of Implementation Activities by Goal (Year 1)

The charts below show where the foundational work within Year 1 was focused, in relation to the goals outlined in the Action Plan. A more detailed breakdown of all Year 1 Implementation Activities is provided in Appendix B.

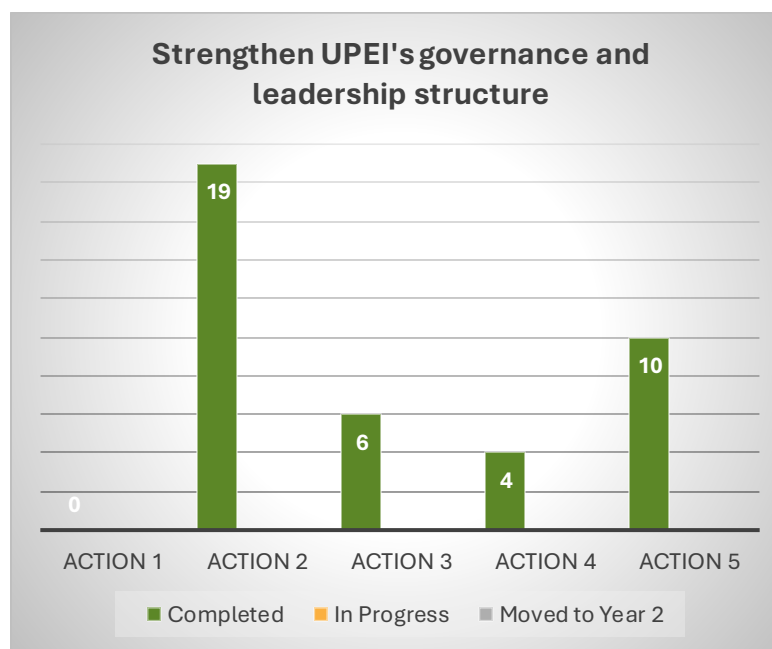
Goal 1: Acknowledge and demonstrate accountability for the issues within the UPEI Review

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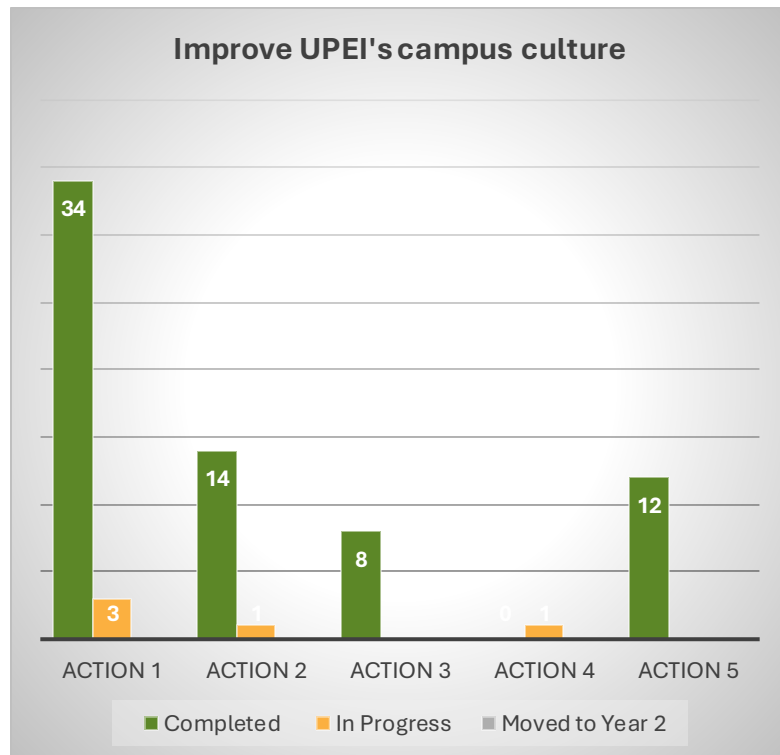
Goal 2: Strengthen UPEI's governance and leadership structure

- **Action 1:** Use a transparent and consultative process and proper due diligence in the selection and hiring of a new University President
- **Action 2:** Refresh the UPEI Board of Governors with new members and create an enhanced accountability and oversight structure
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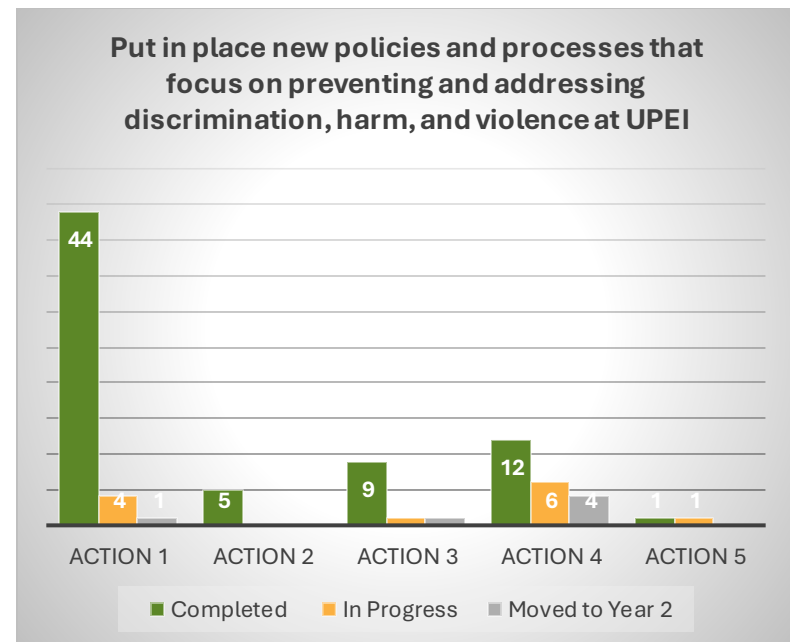
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Goal 4: Put in place new policies and processes that focus on preventing and addressing discrimination, harm, and violence at UPEI

- **Action 1:** Develop an EDI and Human Rights Department at UPEI
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APPENDIX A
DETAILED PROGRESS REPORT - YEAR 0 (MAY 1, 2023-APRIL 30, 2024)

APPENDIX A – YEAR 0 DETAILED PROGRESS REPORT (May 1,2023 – April 30, 2024)

Changes to Timeline and/or Scope of Implementation Activities – Year 0

The chart below outlines implementation activities that were completed in Year 1, to fulfill the Year 0 Action Plan commitments.

SUPPORTING ACTION	ACTION PLAN TIMELINE	IMPLEMENTATION ACTIVITY(S)	CHANGE
2.2.1.2 inform Board-member-appointing bodies of skill, demographic, and experience gaps	Year 0	<ul style="list-style-type: none"> Update the skills matrix, which includes a representation survey, based on feedback from the Governance Review Survey the Board of Governors using the updated skills matrix and representation survey Inform appointing bodies of gaps identified from the updated skills matrix and representation survey 	These activities were completed in Year 1 of the Implementation to allow for consideration of the Governance Review response.
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	Year 0	<ul style="list-style-type: none"> Update the skills and representation tools based on the feedback from the Governance Review, including age. 	These activities were completed in Year 1 of the Implementation to allow for consideration of the Governance Review response.
3.5.2.1 Provide communications proactivity to the UPEI community regarding Board of Governors and Senate meeting dates, and times, and include methods to attend.	Year 0	<ul style="list-style-type: none"> Board of Governors' meetings open to the public will be announced via campus communiques, beginning October 2024 Add the methods to attend Senate meetings to the Senate website as of September 2024 	These activities were added to the Year 1 implementation plan to provide increased availability of information related to Board and Senate meetings.

Detailed Activity Progress – Year 0

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 it.

SUPPORTING ACTIONS	ACTION PLAN TIMELINE	IMPLEMENTATION ACTIVITIES	PROGRESS
1.1.1.1 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	Year 0	Legal counsel provided recommendations to the Board of Governors regarding necessary redactions to the UPEI Review Report.	COMPLETE
		The Board of Governors approved the final public version of the UPEI Review Report, with the necessary redactions.	COMPLETE
		The Board of Governors officially released the UPEI Review, with necessary redactions.	COMPLETE
1.1.1.2 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.	Year 0	The Interim President led multiple listening sessions to hear from the campus community.	COMPLETE
		Feedback themes were captured during the listening sessions.	COMPLETE
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	Year 0	The Chair of the Board of Governors and Interim President apologized to the campus community through campus communiques and media releases.	COMPLETE
		The Interim President apologized during the listening sessions.	COMPLETE

		The Chair of the Board of Governors and Interim President participated in media interviews after the apology was communicated.	COMPLETE
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 apology and acknowledgement are meant to signal a commitment to listen and learn, as a step towards reconciliation.	Year 0	An explicit apology, acknowledging harms and the bravery of those who have spoken out, as well as a commitment to action was included in the UPEI Action Plan and signed by the Chair of the Board of Governors and the Interim President.	COMPLETE
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.	Year 0	Employee and Family Assistance Program information, employee-student support information, and additional in-person, on-campus counselling supports were included on a dedicated web page within the Response to Independent Review web pages on upei.ca.	COMPLETE
		Employee and Family Assistance Program services/supports, and additional counselling supports were communicated in emails sent to faculty, staff, and students about UPEI's response to the UPEI Review Report; emails were posted on the upei.ca website as news updates.	COMPLETE
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.	Year 0	Information on how to make disclosures/reports of harassment/discrimination re: senior leaders was included on the dedicated Community Supports web page within Response to Independent Review web pages on upei.ca.	COMPLETE

		The information on how to make disclosures/reports of harassment/discrimination was communicated in a list serv email to faculty, staff, and students; email was posted on the upei.ca website as a news update; and several Campus Notices were issued.	COMPLETE
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.	Year 0	A hiring competition for a new Administrative Assistant position in the EDI Office and Sexual Violence Prevention and Response Office was posted.	COMPLETE
		A hiring competition for a new Director of EDI and Human Rights position in the EDI and Human Rights department was posted.	COMPLETE
		A hiring competition for a new Human Rights Counsel position in the EDI and Human Rights department was posted.	COMPLETE
		A hiring competition for a new Manager of Student Culture and Community Standards position in Student Affairs was posted.	COMPLETE
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	Year 0	A Call for Expressions of Interest for participation in the UPEI Action Plan Advisory Group was issued.	COMPLETE
		The Action Plan Advisory Group was formed in September 2023. The Action Plan Advisory Group was composed of internal and external community stakeholders and led by a third-party facilitator to engage in consultation and provide feedback to help inform the development of the Action Plan to address recommendations outlined in the UPEI Review.	COMPLETE

1.1.4.2 The Interim President held townhalls and a series of campus listening sessions	Year 0	A schedule was developed and the event logistics for two town halls and 16 campus listening sessions were organized.	COMPLETE
		The times and locations were communicated to faculty, staff, and students in list serv emails; they were also posted as news updates on upei.ca.	COMPLETE
		Times and locations were posted on upei.ca Events Calendar and in Campus Notices.	COMPLETE
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	Year 0	The Chair of the Board of Governors met with survivors to hear about their experience, apologize for the harm they incurred, and seek their advice on how to move forward.	COMPLETE
		The Interim President met with survivors who expressed an interest in meeting, to hear about their experience, apologize for the harm they incurred, and seek their advice on how to move forward.	COMPLETE
		Two survivors from 2013 shared their experiences with the Board of Governors.	COMPLETE
		The apology statement in the draft Action Plan was amended based on feedback from three survivors.	COMPLETE
1.1.4.4 UPEI leadership maintains communication with other groups and organizations including the UPEI Student Union, the UPEI Alumni Association, and the provincial government	Year 0	The Interim President began meeting regularly in September 2023 with the President of the UPEI Student Union to discuss issues of interest to the UPEI Student Union, including progress on the Action Plan.	COMPLETE
		The Interim President and Interim Vice-President People and Culture began meeting regularly in August	COMPLETE

		2023 with the Deputy Minister of Workforce, Advanced Learning and Population, as well as the Director for Higher Education, to discuss progress on the Action Plan.	
		The Action Plan Advisory Group was formed in September of 2023. The Action Plan Advisory Group membership included four students and two members of the UPEI Alumni Association.	COMPLETE
1.1.5.1 Obtain an external review of Board governance, including a review of processes for recruitment of new Board members	Year 0-1	An external consultant was appointed in January 2024 to conduct the review.	COMPLETE

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

SUPPORTING ACTIONS	ACTION PLAN TIMELINE	IMPLEMENTATION ACTIVITIES	PROGRESS
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 Action Plan Advisory Group and through campus listening sessions.	Year 0	A public statement of accountability and commitment was included in the UPEI Action Plan to address the recommendations of the UPEI Review.	COMPLETE
		Feedback and guidance from the Action Plan Advisory Group were shared in their entirety in Appendix 2 of the UPEI Action Plan. This information was used to inform the plan's goals and action items. The Action Plan	COMPLETE

		Advisory Group consisted of 21 members and a third-party facilitator. Members included UPEI faculty representatives, students, faculty, staff, alumni, and members of the broader community.	
		Feedback from the UPEI town halls and listening sessions was grouped by themes relating to the main aspects of the UPEI Review recommendations. Themes were used to inform the plan's goals and actions items.	COMPLETE
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	Year 0	Feedback and guidance from the Action Plan Advisory Group were shared in their entirety in Appendix 2 of the UPEI Action Plan. This information was used to inform the plan's goals and action items. The Action Plan Advisory Group consisted of 21 members and a third-party facilitator. Members included UPEI faculty representatives, students, faculty, staff, alumni, and members of the broader community.	COMPLETE
		Feedback from the UPEI town halls and listening sessions was grouped by themes relating to the main aspects of the UPEI Review recommendations. Themes were used to inform the plan's goals and actions items.	COMPLETE
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	Year 0	An online form was developed to accept expressions of interest in being a member of the Action Plan Advisory Group	COMPLETE
		A message was issued to the campus community and stakeholder organizations and a news release sent to media outlets to promote the call for expressions of interest.	COMPLETE

		A call for expressions of interest was posted on a dedicated Action Plan Advisory Group page within the Response to Independent Review web pages on upei.ca.	COMPLETE
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.	Year 0	An agreement was established with an external facilitator to lead the Action Plan Advisory Group consultation process and perform the following services: support the recruitment of the Action Plan Advisory Group, develop the facilitation plan, facilitate collaborative process for the Action Plan Advisory Group, and draft the feedback framework.	COMPLETE
1.2.2.3 Through the process, information on the process of the Advisory Group was shared with campus.	Year 0	Updates from the Action Plan Advisory Group facilitator were posted on a dedicated page within the Response to Independent Review web pages.	COMPLETE
		Email updates from the Interim President were issued to the campus community on the progress of the Action Plan Advisory Group.	COMPLETE
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.	Year 0-5	The Interim President held town halls (2 each for students, staff, and faculty) in the 2024 winter semester.	COMPLETE

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

SUPPORTING ACTIONS	ACTION PLAN TIMELINE	IMPLEMENTATION ACTIVITIES	PROGRESS
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	Year 0	Feedback from the UPEI town halls and listening sessions were grouped by themes relating to the main aspects of the UPEI Review recommendations. Themes were used to inform the plan's goals and actions items.	COMPLETE
		Feedback and guidance from the Action Plan Advisory Group were shared in their entirety in Appendix 2 of the UPEI Action Plan. This information was used to inform the plan's goals and action items. The Action Plan Advisory Group consisted of 21 members and a third- party facilitator. Members included UPEI faculty representatives, students, faculty, staff, alumni, and members of the broader community.	COMPLETE
		The Interim President and Interim Vice-President People and Culture began meeting regularly in August 2023 with the Deputy Minister of Workforce, Advanced Learning and Population, as well as the Director for Higher Education, to discuss progress on the Action Plan.	COMPLETE
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.	Year 0	The preliminary draft UPEI Action Plan was posted on the UPEI website for a two-week public consultation period from January 3 to 17, 2024. A survey was provided to gather feedback on the draft.	COMPLETE

		Survey feedback was reviewed and considered by UPEI's senior leadership. Further revisions were made to finalize plan goals and actions based on their recommendations.	COMPLETE
		The final version of the UPEI Action Plan was posted to UPEI's website on March 27, 2024, following public consultation of the January 3, 2023, draft and reviews by the Board's Campus Culture Oversight Committee; Board of Governors; Action Plan Advisory Group; and Senate.	COMPLETE
1.3.2.1 Post the draft Action Plan on the UPEI website in early January 2024.	<i>Year 0</i>	The preliminary draft of the UPEI Action Plan was posted on the UPEI website for a two-week public consultation period from January 3-17, 2024. A survey was provided to gather feedback on the draft.	COMPLETE
1.3.2.2 Finalize the Action Plan after consideration of the community feedback as well as feedback from the UPEI Senate and Board.	<i>Year 0</i>	The preliminary draft of the UPEI Action Plan was posted on the UPEI website for a two-week public consultation period from January 3-17, 2024. A survey was provided to gather feedback on the draft.	COMPLETE
		Survey feedback was reviewed and considered by senior leadership. Further revisions were made to plan goals and actions based on their recommendations.	COMPLETE
		Revised Action Plan reflecting feedback from the public consultation period was shared and discussed at Board of Governors, Campus Culture Oversight Committee, and Senate meetings. Upon approval of the revisions, the Action Plan was finalized.	COMPLETE

1.3.3.1 Identify initial human resources and budget needs related to the Action Plan and seek funding support.	Year 0	A memo to the Government of PEI was prepared and issued, outlining initial human resources and budget needs related to the Action Plan and seeking funding support.	COMPLETE
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.	Year 0	The Board of Governors approved a Terms of Reference for a new Campus Culture Oversight Committee, which included providing oversight to the implementation of the Action Plan and receiving annual audit reports on the progress of the implementation of the Action Plan.	COMPLETE

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

SUPPORTING ACTIONS	ACTION PLAN TIMELINE	IMPLEMENTATION ACTIVITIES	PROGRESS
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.	Year 0	Championing the work on culture improvements is included in the University President's job description.	COMPLETE
2.1.1.2 Build the following components into the selection criteria for the next President: <ul style="list-style-type: none"> ▪ Commitment to equity, diversity, and inclusion ▪ Deep understanding of workplace fairness and harassment ▪ Track record of success in implementation of projects to advance EDI in meaningful ways. 	Year 0	The following components were built into the selection criteria for the next President: <ul style="list-style-type: none"> • commitment to equity, diversity, and inclusion • deep understanding of workplace fairness and harassment • track record of success in implementation of projects to advance EDI in meaningful ways • commitment to reconciliation and Indigenization 	COMPLETE

<ul style="list-style-type: none"> ▪ Commitment to reconciliation and Indigenization ▪ Organization change experience and desires to champion change ▪ Ethics, transparency and integrity 		<ul style="list-style-type: none"> • organizational change experience and desire to champion change • ethics, transparency, and integrity 	
2.1.1.3 Post a detailed job description on the UPEI website for full transparency.	Year 0	A detailed job description for the position of President was posted on the UPEI website.	COMPLETE
2.1.2.1 Communicate information and updates regularly about the selection process to the campus community	Year 0-1	A communications approach was developed regarding the presidential search, including web page structure.	COMPLETE
		Web pages dedicated to the search process were published.	COMPLETE
		Messages (15) were issued via listserv email systems, posted on news page of upei.ca, and tagged to the presidential search website at each of six phases of process: planning, consultation, candidate search, candidate assessment, interview, announcement.	COMPLETE
2.1.3.1 Provide the campus community with feedback opportunities, which will include campus presentations for shortlisted candidates.	Year 0	Campus community members were invited to fireside chats with the three finalist candidates and the Chair of the Board of Governors.	COMPLETE
		Campus community members were offered the opportunity to provide anonymous feedback on the three finalist candidates.	COMPLETE
2.1.3.2 Provide campus members the opportunity to give anonymous feedback on shortlisted candidates	Year 0	Campus community members were offered the opportunity to provide anonymous feedback on the three finalist candidates.	COMPLETE
2.1.4.1 Require shortlisted candidates to provide a response to the UPEI Review recommendations.	Year 0	Short-listed presidential candidates were required to provide a response to the UPEI Review recommendations as part of the interview process.	COMPLETE

2.1.4.2 Require shortlisted candidates to provide a response to the draft Action Plan	Year 0	Short-listed presidential candidates were required to provide a response to the UPEI Draft Action Plan recommendations as part of the interview process.	COMPLETE
2.1.5.1 Ensure that the next President has been adequately vetted	Year 0	Background checks were completed on the three finalist candidates	COMPLETE
		A UPEI faculty member, who was also a member of the search committee, reviewed the scholarship for the three finalist candidates.	COMPLETE

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

SUPPORTING ACTIONS	ACTION PLAN TIMELINE	IMPLEMENTATION ACTIVITIES	PROGRESS
2.2.1.1 Adopt good governance practices to ensure board policies, practices, and recruitment creates conditions aimed at increasing Board diversity.	Year 0	A skills matrix and representation survey were developed to assess current skill, background, and representation on the Board of Governors.	COMPLETE
		Skills and representation on the Board of Governors were assessed using the skills matrix and representation surveys.	COMPLETE
		Skill and representation gaps among Board of Governors membership were identified	COMPLETE
		An advertisement for applicants to the Board of Governors was posted, requesting demographics information.	COMPLETE

		Board of Governors candidates who addressed skill and representation gaps were identified.	COMPLETE
		All Board of Governors members were offered Equity, Diversity, and Inclusion training.	COMPLETE
2.2.1.2 Inform Board-member-appointing bodies of skill, demographic, and experience gaps	Year 0	Informed provincial representatives of skill and representation gaps.	COMPLETE
		Faculty was informed of representation gaps prior to conducting their election for new Board of Governors representatives.	COMPLETE
		The Alumni Association was informed of skill and representation gaps, prior to their election of a new Board of Governors representative.	COMPLETE
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.	Year 0	Skills and representation on the Board of Governors were assessed using the skills matrix, which includes a representation survey.	COMPLETE
		Skill and representation gaps were identified among Board of Governors membership.	COMPLETE
		Candidates with backgrounds that addressed skill and/or representation gaps were recommended for appointment to the Board of Governors.	COMPLETE
2.2.2.2 Make the Board recruitment process for UPEI Board appointments more transparent by making it public and publicizing the opportunity.	Year 0	An advertisement for applicants to the Board of Governors was publicly posted, detailing the process to apply.	COMPLETE
		New Board of Governors members were publicly announced.	COMPLETE

2.2.3.1 Obtain an external review on Board governance.	Year 0-1	An external consultant was appointed in January 2024 to conduct the review.	COMPLETE
2.2.3.2 Make changes in board procedures resulting from the review recommendations public.	Year 0-1	An external review of board governance was initiated.	COMPLETE
2.2.4.1 Review Terms of Reference of Board Standing Committees to ensure that Board oversight responsibilities are adequately met	Year 0-2	The Internal Auditor conducted an internal review of the terms of reference for the Board of Governors standing committees.	COMPLETE
		The Board of Governors reviewed and approved revised terms of reference for Board of Governors committees.	COMPLETE
		An external consultant was contracted to conduct a Governance Review, which included reviewing the revised terms of reference for standing committees.	COMPLETE
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	Year 0-2	A new Campus Culture Oversight Committee of the Board of Governors was established, which includes responsibility for oversight of the UPEI Action Plan.	COMPLETE
2.2.4.3 Enhance Board Training	Year 0-2	In-person orientation was provided for Board members that included the following topics: board governance, university finances, university programs and research, human resources, risk management, policy development, internal audit, information technology, communications, fundraising and development.	COMPLETE
		EDI training for Board members was offered.	COMPLETE

GOAL 3 IMPROVE UPEI'S CAMPUS CULTURE

Action 1 Create a culture of listening at UPEI.

SUPPORTING ACTIONS	ACTION PLAN TIMELINE	IMPLEMENTATION ACTIVITIES	PROGRESS
3.1.3.1 Coordinate with campus partners to foster a campus culture built on a commitment to listening and idea sharing	Year 0-5	The preliminary draft UPEI Action Plan was posted on the UPEI website for a two-week public consultation period from January 3 to 17, 2024. A survey was provided alongside the document to gather feedback on the draft.	COMPLETE
		The Interim President held 2 campus town halls and 16 listening sessions with individual faculties, staff groups and students in the summer and fall of 2023, as well as 6 additional sessions in the winter and spring of 2024.	COMPLETE
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	Year 0-5	The Interim President held in-person and virtual meetings with the 2013 and 2021 survivors who expressed an interest in meeting, as well as solicited feedback from them on components of the UPEI Action Plan.	COMPLETE
3.1.3.3 Continue to work with the Indigenous community at UPEI to further our journey of reconciliation	Year 0-5	The development and permanent funding of the Faculty of Indigenous Knowledge, Education, Research and Applied Studies was supported.	COMPLETE

GOAL 3 IMPROVE UPEI'S CAMPUS CULTURE

Action 2 Foster an environment in which employees feel valued

SUPPORTING ACTIONS	ACTION PLAN TIMELINE	IMPLEMENTATION ACTIVITIES	PROGRESS
3.2.1.1 Create and fill a Director of Human Resources position	Year 0	A hiring competition for the new position of Director of Human Resources was posted.	COMPLETE
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	Year 0-5	The Interim President held town halls (2 each for students, staff, and faculty) in the 2024 winter semester.	COMPLETE

GOAL 3 IMPROVE UPEI'S CAMPUS CULTURE

Action 3 Rebuild trust and safety on campus

SUPPORTING ACTIONS	ACTION PLAN TIMELINE	IMPLEMENTATION ACTIVITIES	PROGRESS
3.3.1.1 Reinstatement of the position of Manager of Security Services, and fill position, to provide a dedicated management resource	Year 0	A hiring competition for the position of Manager of Security Services was posted.	COMPLETE
		A new Manager of Security Services has been hired.	COMPLETE
3.3.1.2 Hire additional security attendants	Year 0-2	A hiring competition for 4 full-time security attendants was posted	COMPLETE
3.3.2.1 UPEI Health, Safety, and Environment to provide and promote information to	Year 0-1	The Health, Safety, and Environment Office intranet site was developed to allow for easy access to	COMPLETE

campus members about reporting under occupational health and safety legislation		information including instructions for workers about incident reporting.	
		Posters were created and posted around campus promoting the reporting of incidents via the UPEI SAFE app.	COMPLETE
		Training sessions to promote and educate on health and safety reporting requirements were offered to students and employees.	COMPLETE
		The Health, Safety and Environment Annual Report (2020 to 2022) which includes information regarding health and safety activities, was published for campus community to access.	COMPLETE

GOAL 3 IMPROVE UPEI'S CAMPUS CULTURE

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

SUPPORTING ACTIONS	ACTION PLAN TIMELINE	IMPLEMENTATION ACTIVITIES	PROGRESS
3.5.2.1 Provide communications proactivity to the UPEI community regarding Board of Governors and Senate meeting dates, and times, and include methods to attend	Year 0	Meeting dates for Board of Governors' meetings were posted online beginning September 2023, for the academic year.	COMPLETE
		The Board of Governors web page was updated to include observer guidelines, describing the process for attending meetings.	COMPLETE

		Meeting dates for Senate meetings were posted online beginning September 2023, for the academic year.	COMPLETE
		Senate meetings open to the public were announced via campus communiques, including methods to attend.	COMPLETE

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.

SUPPORTING ACTIONS	ACTION PLAN TIMELINE	IMPLEMENTATION ACTIVITIES	PROGRESS
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.	Year 0-1	The new Department of EDI and Human Rights was announced. The department has three major pillars of responsibility: EDI, sexual violence prevention and response, and administration of harassment and discrimination complaints.	COMPLETE
		A hiring competition for a new position of Director of EDI and Human Rights in the Department of EDI and Human Rights was posted.	COMPLETE
		A hiring competition for a new position of Human Rights Counsel in the Department of EDI and Human Rights was posted.	COMPLETE
		The appointment of critical leadership positions within the Department of EDI and Human Rights was communicated.	COMPLETE

4.1.1.4 Department will report directly to VP People and Culture	Year 0-1	The EDI and Human Rights department reports to the Vice President, People and Culture	COMPLETE
4.1.2.1 Move the EDI and SVPRO offices to a more visible location	Year 0-1	Staff for the new Department of EDI and Human Rights and the Sexual Violence Prevention and Response Office were moved to the first floor of Kelley Memorial Building.	COMPLETE
4.1.2.2 Hire additional staff to support the new EDI and Human Rights Department	Year 0-1	A hiring competition for the new position of Director of EDI and Human Rights was posted.	COMPLETE
		A hiring competition for a new position of Human Rights Counsel was posted.	COMPLETE
4.1.2.3 Create a new leadership position, Director of EDI, and Human Rights to provide oversight and leadership to the Department	Year 0-1	A hiring competition for a new position of Director of EDI and Human Rights in the Department of EDI and Human Rights was posted.	COMPLETE
		A hiring competition for a new position of Human Rights Counsel position in the Department of EDI and Human Rights was posted.	COMPLETE
4.1.2.4 Create a new administrative assistance position to support the Department	Year 0-1	A hiring competition for a new position of Administrative Assistant for the Department of EDI and Human Rights was posted.	COMPLETE
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	Year 0-1	A hiring competition for a new position of Sexual Violence Prevention and Response Coordinator, with job responsibilities that will supplement response capacity, and involvement with prevention activities, was posted.	COMPLETE
4.1.4.1 Review initiatives at other post-secondary educational institutions	Year 0-1	Initiatives at other post-secondary institutions that are relevant to training were reviewed and recorded.	COMPLETE

4.1.4.3 Invest in partnership with a comprehensive EDI training partner (i.e., Canadian Centre for Diversity and Inclusion)	Year 0-1	The Canadian Centre for Diversity and Inclusion was contracted to provide online, on-demand, EDI training opportunities to campus.	COMPLETE
		Access to the offerings of the EDI training partner was provided to the campus community.	COMPLETE
4.1.4.6 Make the online Preventing Sexualized Violence course available to all faculty, staff, and students.	Year 0-1	The online Preventing Sexualized Violence course was made available to all first-year students.	COMPLETE
		The online Preventing Sexualized Violence course was made available to all faculty, staff, and students.	COMPLETE
4.1.4.7 Make the online Preventing Sexualized Violence course mandatory for all incoming students	Year 0-1	The online Preventing Sexualized Violence non-credit course was made mandatory for all new students in September 2023. For students with a catalog year of 2023 and thereafter, the course was added as a graduation requirement.	COMPLETE
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	Year 0-1	Information on EDI, human rights, and sexual violence prevention was collected from other post-secondary institutions, research databases, and/or community organizations and recorded.	COMPLETE
4.1.5.2 Obtain information regarding experiences of other institutions with collection of workforce diversity information to inform future planning	Year 0-1	Information about initiatives at other post-secondary institutions to collect workforce diversity information was reviewed and recorded.	COMPLETE

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

SUPPORTING ACTIONS	ACTION PLAN TIMELINE	IMPLEMENTATION ACTIVITIES	PROGRESS
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.	Year 0	An external qualified resource was sourced to provide a pathway for employees to make confidential disclosures of harassment/discrimination against senior leaders, independent of the current fair treatment advocate.	COMPLETE
4.3.1.2 Instruct the Fair Treatment Advocate to use a variety of investigators in their investigations	Year 0	The Fair Treatment Advocate was instructed to use a variety of investigators.	COMPLETE

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

SUPPORTING ACTIONS	ACTION PLAN TIMELINE	IMPLEMENTATION ACTIVITIES	PROGRESS
4.4.2.1 Ensure there is ongoing communication between SVPRO and residence life administration	Year 0	The Sexual Violence Prevention and Response Office and Residence Life had ongoing communication throughout the year.	COMPLETE

4.4.4.1 Make the online Preventing Sexualized Violence course available to all faculty, staff, and students	Year 0-1	The online Preventing Sexualized Violence course was made available to all first-year students.	COMPLETE
		The online Preventing Sexualized Violence course was made available to all faculty, staff, and students.	COMPLETE
4.4.4.2 Make the online Preventing Sexualized Violence course mandatory for all incoming students	Year 0-1	The online Preventing Sexualized Violence non-credit course was made mandatory for all new students in September 2023. For students with a catalog year of 2023 and thereafter, the course was added as a graduation requirement.	COMPLETE
4.4.5.1 Collect statistical information on sexual violence disclosure from a victim-centered lens	Year 0-1	A Sexual Violence Prevention and Response Office case monitoring document, which tracks case information by multiple data points, and allows searching, and statistical reporting, was created.	COMPLETE
		The design of the Sexual Violence Prevention and Response Office case monitoring document was led by the Sexual Violence Response Navigator to ensure a victim-centered lens was a primary consideration.	COMPLETE
4.4.5.2 Implement process to allow monitoring of trends	Year 0-1	A Sexual Violence Prevention and Response Office case monitoring document, which tracks case information by multiple data points, and allows searching, and statistical reporting, was created.	COMPLETE
		The Sexual Violence Prevention and Response Office case monitoring document was designed to allow multiple data points to be tracked, sorted, and filtered, and reportable, to allow trends to be monitored.	COMPLETE

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.*

SUPPORTING ACTIONS	ACTION PLAN TIMELINE	IMPLEMENTATION ACTIVITIES	PROGRESS
4.5.2.1 Review processes regarding violence, sexual violence, harassment, and discrimination to ensure they are designed reflecting principles of safety and respect.	Year 0-5	The principles of safety and respect in the review of processes regarding sexual violence were considered.	COMPLETE
		The existing UPEI Fair Treatment Policy was reviewed to ensure PEI Occupational Health and Safety Workplace Harassment Regulations were met.	COMPLETE

APPENDIX B
DETAILED PROGRESS REPORT - YEAR 1 (MAY 1, 2024-APRIL 30, 2025)

APPENDIX B – YEAR 1 DETAILED PROGRESS REPORT (May 1,2024 – April 30, 2025)

Year 1 – Changes to timeline or scope of implementation activities

The chart below outlines the implementation activities that were included as part of the Year 1 Implementation Plan but were not completed as documented.

ACTION PLAN REFERENCE	ACTION PLAN TIMELINE	IMPLEMENTATION ACTIVITY(S) PLANNED FOR YEAR 1	CHANGE
4.1.6.2 Work with Human Resources to improve accommodations processes for faculty and staff and make the information easily available	Year 1-3	<ul style="list-style-type: none">• Work with Human Resources to review and finalize an accommodations procedure for faculty and staff• Make information about the accommodation procedure accessible to faculty and staff• Share information about the accommodation procedure on the HR web pages on upei.ca and myUPEI, and on the EDI site on myUPEI.	Work on these activities will continue into Year 2, with additional activities, including union consultations, being added to the plan.
4.1.5.2 Obtain information regarding experiences of other institutions with collection of workforce diversity information to inform future planning	Year 0-1	<ul style="list-style-type: none">• Review and record information about initiatives to collect workforce diversity information at other post-secondary institutions.	This activity was completed in Year 0.
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	Year 0-5	<ul style="list-style-type: none">• Make clear pathways for safe disclosure	This activity will continue into Year 2, as it is work that is being completed through the development of the Harassment and Discrimination Policy.

3.2.1.4 Plan and develop initiatives to enhance employee engagement	Year 1	<ul style="list-style-type: none"> • Develop a document outlining a plan for engagement initiatives 	This activity will be continued in Year 2, to allow the plan to be influenced by the employee engagement survey results and the roll out of these results at the department level.
3.1.3.3 Continue to work with the Indigenous community at UPEI to further our journey of reconciliation	Year 0-5	<ul style="list-style-type: none"> • Continue to work with Lennox Island First Nations, Abegweit First Nations, and the Native Council of PEI to further our journey of reconciliation • The Chair, Board of Governors, and President will meet with Lennox Island First Nations, Abegweit First Nations, and the Native Council of PEI leaders • Support implementation of Indigenous Strategic 	The President participated in the meetings specified. The remaining initiatives are ongoing and will continue into Year 2.
3.4.1.1 Communicate behavioral obligations and limitations through documents, including the Sexual Violence Policy, Harassment and Discrimination Policy, Student Code of Conduct, Athletic Club Guidelines, and International Student Orientation handbook.	Year 1-5	<ul style="list-style-type: none"> • Meet with those responsible for policies, codes of conduct and guidelines to establish communications strategies for various audiences 	These discussions have begun and will continue into Year 2.
4.1.7.1 Build capacity for informal resolution methods applicable to matters under the Sexual Violence Policy and a new Harassment and Discrimination Policy	Year 1	<ul style="list-style-type: none"> • Have the informal resolution specialist work with Sexual Violence Prevention and Response Coordinator to consider best practices for informal resolution 	The position of Human Rights resolution specialist was posted in Year 1, however, was not yet filled at year end. Therefore, the assignment of work for this role will be carried forward to Year 2.

4.4.2.7 Provide investigation results to the respondent's internal support provider	Year 1-2	<ul style="list-style-type: none"> If authorized by the respondent, provide results to the respondent support provider 	This activity will be moved into Year 2 for implementation, pending the revision of the Sexual Violence Policy.
4.3.1 Replace the Fair Treatment Policy	Year 1-2	Multiple activities related to the development of the Harassment and Discrimination Policy	This process is well underway and is planned to be completed in Year 2
4.4.1 Finalize revisions to the Sexual Violence Policy	Year 1	Multiple activities related to the revision of the Sexual Violence Policy	This process is well underway and is planned to be completed in Year 2

Detailed Activity Progress – Year 1

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 it

SUPPORTING ACTIONS	ACTION PLAN TIMELINE	IMPLEMENTATION ACTIVITIES	PROGRESS
1.1.5.1 Obtain an external review of Board governance, including a review of processes for recruitment of new Board members	Year 0-1	An external consultant was appointed in January 2024 to conduct the review.	COMPLETE
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	Year 1	Conduct research and review of current University leadership structure to identify structure gaps and strengths.	COMPLETE
		Create a new organizational structure to address gaps and build on strengths.	COMPLETE

		Create new job descriptions for senior positions.	COMPLETE
1.1.5.3 Develop a 360-degree performance review process for President and Senior Executive Team	Year 1	Develop a leadership framework with a panel of representatives from across the University.	COMPLETE
		Develop a 360-degree process for the President and Senior Executive Team.	COMPLETE

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

SUPPORTING ACTIONS	ACTION PLAN TIMELINE	IMPLEMENTATION ACTIVITIES	PROGRESS
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	Year 0-5	President will hold community Town Halls early in term to kick off strategic planning exercises.	COMPLETE
		Develop an approach to consulting with the campus community throughout the year.	COMPLETE

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

SUPPORTING ACTIONS	ACTION PLAN TIMELINE	IMPLEMENTATION ACTIVITIES	PROGRESS
1.4.1.1 Select auditor with EDI competency based on recommendation of the Finance and Audit Committee and in consultation with the Government of PEI	Year 1	Confirm support for selected Audit Framework with the Province of PEI.	COMPLETE
		Create RFP committee with members from the Finance and Audit Committee of the Board of Governors, UPEI management and the Province of PEI	COMPLETE
		Develop and issue an RFP to obtain an Audit firm with EDI competency.	COMPLETE
		Obtain approval of the firm selected for the audit from the Finance and Audit Committee of the Board of Governors.	COMPLETE
1.4.1.2 Consider an audit organization that has access to a resource base outside PEI as well as experience within post-secondary education	Year 1	RFP requirement to include organizations that have access to a resource base outside PEI as well as experience in post-secondary education.	COMPLETE
1.4.2.1 Develop audit schedule and process to support annual audits	Year 1-5	Post a hiring competition for a new Program Manager Action Plan Implementation, whose duties will include supporting departments as they prepare for the annual audits.	COMPLETE
		Define an audit schedule that aligns with UPEI's fiscal year audit schedule and is included as part of the RFP for the auditor.	COMPLETE

		Develop a process for the collection of audit evidence.	COMPLETE
		Provide an annual progress report to the auditors on the activities outlined in the implementation plan	COMPLETE
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.	Year 1-5	Define the relevant goals from the PEI Advisory Council of the Status of Women Equality Report Card	COMPLETE
		Communicate the relevant goals to implementation leads, who are responsible for creating implementation plans.	COMPLETE
		Highlight where the relevant goals are considered	COMPLETE
1.4.2.3 Align internal resource needs to support the audit	Year 1-5	Post a hiring competition for a new Program Manager Action Plan Implementation, whose duties will include supporting departments as they prepare for the annual audits.	COMPLETE
		Assign implementation leads to support audit activities.	COMPLETE

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

SUPPORTING ACTIONS	ACTION PLAN TIMELINE	IMPLEMENTATION ACTIVITIES	PROGRESS
2.2.1.2 Inform Board-member-appointing bodies of skill, demographic, and experience gaps.	Year 0	Update the skills matrix, which includes a representation survey, based on feedback from the Governance Review	COMPLETE
		Survey the Board of Governors members using the updated skills matrix and representation survey.	COMPLETE

		Inform appointing bodies of gaps identified from the updated skills matrix and representation survey.	COMPLETE
2.2.2.1 Use the newly developed skills matrix to ensure a balanced representation of skills, expertise (including EDI), experience, demographic (including race, gender, and age), and other relevant considerations in relation to the composition of the Board of Governors	Year 0	Update the skills and representation tools based on the feedback from the Governance Review and include age.	COMPLETE
2.2.3.1 Obtain an external review of Board governance	Year 0-1	An External consultant was appointed in January 2024 to conduct the review.	COMPLETE
2.2.3.2 Make changes in board procedures resulting from the review recommendations, public.	Year 0-1	Provide a public response to the Governance Review, identifying actioned and planned changes in Board of Governors procedures.	COMPLETE
2.2.4.1 Review Terms of Reference of Board Standing Committees to ensure that Board oversight responsibilities are adequately met.	Year 0-2	Prepare a response to recommendations from external consultant regarding changes to the Terms of Reference for the Board of Governors Standing Committees.	COMPLETE
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.	Year 0-2	Update the Terms of Reference for the Campus Culture Oversight Committee of the Board of Governors to include EDI Strategy progress monitoring	COMPLETE
2.2.4.3 Enhance Board Training	Year 0-2	Provide education on board governance to the Board of Governors.	COMPLETE
		Develop a training plan for Board of Governors members	COMPLETE

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	Year 1-2	Develop a report for the HR Committee of the Board, which includes the number of terminations and resignations by union group, and whether any such terminations or resignations have associated NDAs.	COMPLETE
		Beginning January 2025, provide a report for each HR Committee of the Board meeting, that includes the number of terminations and resignations by union group, and whether any such terminations or resignations have associated NDAs.	COMPLETE
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	Year 1	Seek approval from the Board of Governors for a new policy on the appointment of acting and interim administrators for senior administrator roles.	COMPLETE
		Communicate the new policy on acting and interim administrators for senior administrator roles to the campus community.	COMPLETE
		Seek approval from the Board of Governors for a new policy on the appointment of acting and interim administrators for the role of president.	COMPLETE
		Communicate the new policy on acting and interim administrators for the role of president to the campus community.	COMPLETE
2.2.6.2 Make the policy accessible to the campus community	Year 1	Post the new policy on the appointment of acting and interim administrators for senior administrator roles on the UPEI website.	COMPLETE
		Post the new policy on the appointment of acting and interim administrators for the role of president on the UPEI website.	COMPLETE

		Send a message(s) to the campus community regarding the availability of the new policies	COMPLETE
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GOAL 2 STRENGTHEN UPEI'S GOVERNANCE AND LEADERSHIP STRUCTURE

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

SUPPORTING ACTIONS	ACTION PLAN TIMELINE	IMPLEMENTATION ACTIVITIES	PROGRESS
2.3.1.1 Provide training on governance and other relevant expertise to the Board and Senate	Year 1-2	Offer governance training to the Board of Governors.	COMPLETE
		Offer EDI training to the Board of Governors and Senate	COMPLETE
2.3.1.2 Provide EDI training to the Board and Senate	Year 1-2	Offer EDI training to the Board of Governors and Senate.	COMPLETE
2.3.2.1 Identify institutional resources to support the development of training programs and related materials.	Year 1-2	Identify internal resources who can deliver on priority areas identified through the Board of Governors and Senate Training Plan.	COMPLETE
2.3.2.2 Develop a training plan for Board of Governors and Senate	Year 1-2	Develop a training plan for the Board of Governors.	COMPLETE

2.3.2.3 Develop a process to track training participation of those in governance related roles	Year 1-2	Track Board of Governors training event attendance.	COMPLETE
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GOAL 2 STRENGTHEN UPEI'S GOVERNANCE AND LEADERSHIP STRUCTURE

Action 4 Develop a UPEI leadership training program for those in leadership roles

SUPPORTING ACTIONS	ACTION PLAN TIMELINE	IMPLEMENTATION ACTIVITIES	PROGRESS
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.	Year 1-2	Develop a leadership framework through a consultative process to identify the desired competencies and behaviors for UPEI leaders.	COMPLETE
		Engage an external consultant to assess training needs of campus leadership and provide recommendations.	COMPLETE
		Request that the external consultant consider how internal resources, including UPEI's professional development team, can be leveraged to help address the training needs of UPEI's leadership. Request that the consultant 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.	COMPLETE
2.4.1.2 Consider potential training topics such as active listening, EDI, cultural competencies, mitigation unconscious	Year 1-2	Request that the external consultant consider how internal resources, including UPEI's professional development team, can be leveraged to help address the	COMPLETE

bias, implementing policies and processes effectively, conflict management, emotional intelligence, and bystander training		training needs of UPEI's leadership. Request that the consultant 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.	
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GOAL 2 STRENGTHEN UPEI'S GOVERNANCE AND LEADERSHIP STRUCTURE

Action 5 Create a leadership development program for academic administrators

SUPPORTING ACTIONS	ACTION PLAN TIMELINE	IMPLEMENTATION ACTIVITIES	PROGRESS
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.	Year 1-2	Create and deliver a Leadership Development Program for academic administrators.	COMPLETE
		Hold an Annual Workshop for Chairs and Deans including faculty reviews, training on EDI, and sessional hiring.	COMPLETE
2.5.1.2 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.	Year 1-2	Within the Leadership Development Program, develop training on leadership skills for fostering a healthy workplace.	COMPLETE
		Within the scope of the Annual Workshop, include topics that foster a healthy workplace.	COMPLETE

2.5.1.3 Use problem-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.	Year 1-2	Within the Leadership Development Program, discuss real-life examples such as discrimination, institutional racism, and microaggressions.	COMPLETE
		Within the scope of the Annual Workshop, include examples of topics of discrimination, education, and harassment.	COMPLETE
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.	Year 1-2	Hold a Leadership Development Workshop that includes these topics conflict management, legal hiring practices, change management, and healthy, inclusive workplaces.	COMPLETE
		Hold a Deans, Chairs, and Coordinators workshop as per Article E1.4.8 of the Collective Agreement.	COMPLETE
		Post a hiring competition for a Faculty Relations Officer position.	COMPLETE
2.5.2.2 Build, through the ongoing process of tracking, a community of colleagues with shared interests and common goals in effective leadership	Year 1-2	Canvas leadership interest and the goals of academic administrators.	COMPLETE

GOAL 3 IMPROVE UPEI'S CAMPUS CULTURE

Action 1 Create a culture of listening at UPEI

SUPPORTING ACTIONS	ACTION PLAN TIMELINE	IMPLEMENTATION ACTIVITIES	PROGRESS
3.1.1.1 Ensure Student Union Executives 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.	Year 1-3	Invite the Student Union Executives to the September meeting of the Vice-President, People and Culture's direct reports.	COMPLETE
		Invite the Graduate Student Association Executive to the September meeting of the Vice-President, People and Culture's direct reports	COMPLETE
		Invite the Student Union and the Graduate Student Association executive to Deans Council to discuss academic structures.	COMPLETE
		Invite the Student Union and the Graduate Student Association to the Academic and Research Leadership Council (directors and administrative units) to discuss academic structures.	COMPLETE
		Invite the Student Union Executives to the September meeting of the Vice- President Administration and Finance's direct reports.	COMPLETE
		Invite the Graduate Student Association Executives to the September meeting of the Vice-President Administration and Finance's direct reports.	COMPLETE
3.1.1.2 Increase the institutional capacity for student-focused data collection and analysis of resulting data on student	Year 1-3	Post a hiring competition for a new Manager Student Culture and Community Standards position.	COMPLETE

experiences, inform initiatives that address student issues, and help assess outcomes.		Post a hiring competition for a new Student Engagement Officer, within the Student Culture and Community Standards department.	COMPLETE
		Post a hiring competition for a new EDI-focused position, within the Student Culture and Community Standards department.	COMPLETE
3.1.1.3 Seek meaningful feedback from students as to their experience through questions such as inclusive and intercultural learning, perceptions of institutional values and commitment to EDI, and diversity-related programming.	Year 1-3	Post a hiring competition for a new Student Engagement Officer, within the Student Culture and Community Standards department.	COMPLETE
		Post a hiring competition for a new EDI-focused position, within the Student Culture and Community Standards department.	COMPLETE
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.	Year 1-3	Identify the key qualitative and quantitative data points required.	COMPLETE
		Identify a data collection and management approach that allows for electronic data storage and analysis.	COMPLETE
3.1.2.1 Provide training on trauma-informed approaches to individuals who handle disclosures	Year 1	Offer in-person training on trauma-informed approaches to those who handle disclosures.	COMPLETE
		Upload resources to the myUPEI EDI site to complement the in-person training.	COMPLETE
3.1.2.2 Provide active listening training	Year 1	Provide training on active listening to those responding to campus community concerns.	COMPLETE
		Upload resources to the myUPEI EDI site to complement training.	COMPLETE

3.1.3.1 Coordinate with campus partners to foster a campus culture built on a commitment to listening and idea sharing	Year 0-5	Create pathways for input, consultation, and report back.	COMPLETE
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	Year 0-5	Individuals who have suffered harm are invited to share their experience with the President.	COMPLETE
		Make clear pathways for safe disclosure.	IN PROGRESS
3.1.3.3 Continue to work with the Indigenous community at UPEI to further our journey of reconciliation	Year 0-5	Continue to work with Lennox Island First Nations, Abegweit First Nations, and the Native Council of PEI to further our journey of reconciliation.	IN PROGRESS
		The Chair, Board of Governors, and President will meet with Lennox Island First Nations, Abegweit First Nations, and the Native Council of PEI leaders.	COMPLETE
		Support implementation of Indigenous Strategic Plan.	IN PROGRESS
3.1.4.1 Develop a process for 360-degree performance review of President	Year 1	Develop a leadership framework with a panel of representatives from across the University.	COMPLETE
		Develop a 360-degree process for the President	COMPLETE
3.1.4.2 Develop a process for 360-degree performance review of the Senior Executive Team	Year 1	Develop a leadership framework with a panel of representatives from across the University.	COMPLETE
		Develop a 360-degree process for the Senior Executive Team	COMPLETE
3.1.5.1 Secure the resources to support employee engagement activities	Year 1	Post a hiring competition for a new Employee Engagement Officer position in the Human Resources department.	COMPLETE

		Contract with a vendor to develop and provide an implementation solution for an Employee Engagement Survey.	COMPLETE
3.1.5.2 Plan and develop employee engagement survey	Year 1	Develop an Employee Engagement Survey.	COMPLETE
3.1.6.1 Develop a process to offer exit interviews for departing employees	Year 1	Develop a guidelines and processes document for exit Interviews.	COMPLETE
		Develop a set of questions for exit interviews.	COMPLETE
		Acquire a solution to conduct exit interviews and manage associated data.	COMPLETE
		Develop a training document related to exit interviews, including purpose, process, use of data, and importance of confidentiality.	COMPLETE
3.1.6.2 Develop a process to share aggregate information learned from exit interviews in confidential and appropriate ways	Year 1	Develop guidelines and processes for exit interviews, which will include how aggregate information will be appropriately shared, while respecting confidentiality.	COMPLETE
		Develop a training document related to exit interviews, including purpose, process, use of data and importance of confidentiality.	COMPLETE
3.1.6.3 Create a position in Human Resources to support exit interview activities	Year 1	Post a hiring competition for a new Employee Engagement Officer position in the Human Resources department.	COMPLETE

GOAL 3 IMPROVE UPEI'S CAMPUS CULTURE

Action 2 Foster an environment in which employees feel valued

SUPPORTING ACTIONS	ACTION PLAN TIMELINE	IMPLEMENTATION ACTIVITIES	PROGRESS
3.2.1.2 Increase staff capacity in the Human Resources department to support employee engagement	Year 1	Post a hiring competition for a new Director of Human Resources position.	COMPLETE
		Post a hiring competition for a new Employee Engagement Officer in the Human Resources Department.	COMPLETE
		Post a hiring competition for a new Workplace Relations Specialist in the Human Resources Department.	COMPLETE
3.2.1.3 Plan and develop employee engagement survey	Year 1	Develop an employee engagement survey.	COMPLETE
3.2.1.4 Plan and develop initiatives to enhance employee engagement	Year 1	Develop a document outlining a plan for engagement initiatives.	IN PROGRESS
3.2.1.5 Encourage all managers to recognize contributions made by employees to the University	Year 1	Communicate best practices that encourage managers to recognize contributions made by employees.	COMPLETE
3.2.2.1 Provide staff with enhanced opportunities for training and skills building	Year 1-5	Post a hiring competition for a new Training and Learning Specialist in the Human Resources Department.	COMPLETE
3.2.2.2 Enhance faculty development opportunities in teaching and research through the Teaching and Learning Centre and Office of Research Services	Year 1-5	Plan a faculty development program that supports researchers with grant proposals, partnerships, and research dissemination	COMPLETE

		Plan a graduate supervisors training program.	COMPLETE
		Develop a schedule for an ongoing series of “Lunch and Learn” sessions focused on teaching and research related professional development.	COMPLETE
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.	Year 0-5	President to hold community town halls early in their term.	COMPLETE
		Develop an approach to consulting with the campus community.	COMPLETE
3.2.5.1 Promote information about supports for campus members in relation to health and wellbeing	Year 1-5	Circulate a notice, semi-annually, that outlines supports available to employees in relation to health and wellbeing	COMPLETE
		Review and update the online benefits portal.	COMPLETE
3.2.5.2 As they are implemented, share information on new supports and services in EDI and SVPRO that are accessible to campus members	Year 1-5	Share information in a timely manner about implementation of new supports and services through outlets such as: Campus Notices, Campus Connector, department emails, campus wide emails, social media, or myUPEI EDI site and/or the main EDI UPEI webpage.	COMPLETE

GOAL 3 IMPROVE UPEI’S CAMPUS CULTURE

Action 3 Rebuild trust and safety on campus

SUPPORTING ACTIONS	ACTION PLAN TIMELINE	IMPLEMENTATION ACTIVITIES	PROGRESS
3.3.1.2 Hire additional security attendants	Year 0-2	Post a hiring competition for 3 full-time Security Attendants.	COMPLETE

3.3.1.3 Create and implement an annual staff training plan for Security Services which includes sexual violence and EDI training	Year 1	Create a training plan that includes mandatory EDI and sexual violence training for Security Attendants.	COMPLETE
		Communicate the annual staff training plan to Security Attendants.	COMPLETE
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	Year 0-1	Offer training sessions for students and employees to promote and educate on health and safety reporting requirements.	COMPLETE
3.3.2.2 Promote the methods that university community members can report safety concerns	Year 1-2	Post new and updated information to the UPEI Health, Safety, and Environment intranet site.	COMPLETE
		Offer training sessions for students and employees that promote and educate health and safety reporting requirements.	COMPLETE
3.3.4.1 Track reporting information (including anonymous and third party) through the Sexual Violence Policy.	Year 1	Develop a mechanism to track information regarding disclosures under the Sexual Violence Policy.	COMPLETE
		Continue to track sexual violence disclosure information.	COMPLETE

GOAL 3 IMPROVE UPEI'S CAMPUS CULTURE

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

SUPPORTING ACTIONS	ACTION PLAN TIMELINE	IMPLEMENTATION ACTIVITIES	PROGRESS
3.4.1.1 Communicate behavioural obligations and limitations through documents, including the Sexual Violence Policy, Harassment and Discrimination Policy, Student Code of Conduct, Athletic Club Guidelines, and International Student Orientation handbook.	Year 1-5	Meet with those responsible for policies, codes of conduct and guidelines to establish communications strategies for various audiences.	IN PROGRESS

GOAL 3 IMPROVE UPEI'S CAMPUS CULTURE

Action 5 Improve campus information sharing and communications processes

SUPPORTING ACTIONS	ACTION PLAN TIMELINE	IMPLEMENTATION ACTIVITIES	PROGRESS
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.	Year 1-2	Conduct a review of websites of other universities to determine the type and level of academic, financial, and governance decision making information that is publicly available and compare it to information available through the UPEI website.	COMPLETE
3.5.1.2 Ensure Board of Governors and Senate minutes are posted online after approval.	Year 1-2	Minutes of open sessions of Board of Governors are posted on the UPEI website within 10 business days of approval, beginning September 2024.	COMPLETE

		Minutes of open sessions of Senate are posted on the UPEI website within 10 business days of approval, beginning October 2024	COMPLETE
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	Year 0	Board of Governors' meetings open to the public will be announced via campus communiques, beginning October 2024.	COMPLETE
		Add the methods to attend Senate meetings to the Senate website as of September 2024.	COMPLETE
3.5.4.1 Enhance information sharing about campus initiatives	Year 1-5	Identify priority campus initiatives for the 2024–2025 academic year.	COMPLETE
		Develop a plan to enhance information sharing about campus initiatives.	COMPLETE
3.5.4.2 Provide information to campus on opportunities to take part in planning and idea sharing	Year 1-5	Provide information to campus on opportunities to take part in planning and idea sharing.	COMPLETE
3.5.5.1 Review structure and objectives of Marketing and Communications department	Year 1	Meet with leads of the Marketing and Communications department.	COMPLETE
		Develop/identify communications and marketing priorities.	COMPLETE
		Review the structure with respect to priorities	COMPLETE
3.5.5.2 Assess adequacy of staffing capacity in Marketing and Communications	Year 1	Review the structure with respect to priorities	COMPLETE

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

SUPPORTING ACTIONS	ACTION PLAN TIMELINE	IMPLEMENTATION ACTIVITIES	PROGRESS
4.1.1.2 Establish the purpose of the EDI and Human Rights department with the organization chart delineating the roles within the office	Year 0-1	Finalize roles in the department and create organizational chart.	COMPLETE
		Update the UPEI website description of the department to describe the purpose of the Department of EDI and Human Rights.	COMPLETE
		Update the myUPEI EDI site to include role descriptions and contact information for all staff in the Department of EDI and Human Rights.	COMPLETE
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.	Year 0-1	Director of EDI and Human Rights will attend the Campus Culture Oversight Committee meetings to present and discuss reports.	COMPLETE
4.1.2.1 Move the EDI and SVPRO offices to a more visible location	Year 0-1	Provide additional office space to the EDI and Sexual Violence Prevention and Response office staff.	COMPLETE
4.1.2.2 Hire additional staff to support the new EDI and Human Rights Department	Year 0-1	Post hiring competitions for the new positions of SV Prevention and Education Officer and Sexual Violence Prevention and Response Coordinator.	COMPLETE

		Post hiring competitions for the new positions of EDI Education and Training Officer, Sexual and Gender Diversity Specialist, and Anti-Racism, Cultural Diversity Project Officer.	COMPLETE
		Post a hiring competition for the new positions of Human Rights and Equity Advisor, and Informal Resolution Specialist.	COMPLETE
		Convert the EDI in Employment Systems Advisor position from a term to a permanent appointment.	COMPLETE
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	Year 0-1	The Sexual Violence Prevention and Response Coordinator will consider the PEI 2026 Equality Report Card Assessment Model, PEI Equality Report Card 2022, and PEI's Sexual Violence Prevention Strategy to ensure the office is aware of provincial initiatives and directions in relation to gender-based violence.	COMPLETE
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)	Year 1-2	Develop a new Harassment and Discrimination Policy which places responsibility for intake and administration of the policy in the new Department of EDI and Human Rights.	IN PROGRESS
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.	Year 1-2	Post a hiring competition for a new position of Human Rights and Equity Advisor with job responsibilities including intake and administration of the new harassment and discrimination policy.	COMPLETE
4.1.3.4 Use a variety of external investigators	Year 1-2	Develop a list of prerequisite requirements for external investigators under the new policy.	COMPLETE
4.1.3.5 Ensure investigations are procedurally fair	Year 1-2	Post a hiring competition for a new position of Human Rights Counsel, with a required qualification of having	COMPLETE

		deep knowledge of, and experience with the application of, principles of administrative and human rights law applicable to harassment, discrimination, and sexual violence complaint processes, including evidentiary standards, procedural fairness, and administration of investigative processes.	
		Assign responsibility for management of complaint processes for both sexual violence and harassment and discrimination, providing investigative oversight for these formal complaint processes, and providing procedural advice for the related compliant processes to the Human Rights Counsel.	COMPLETE
4.1.3.6 Provide informal resolution services in accordance with the new Harassment and Discrimination Policy.	Year 1-2	Post a hiring competition for a new position of Informal Resolution Specialist to provide informal resolution services under the new Harassment and Discrimination policy.	COMPLETE
4.1.4.1 Review initiatives at other post-secondary educational institutions	Year 0-1	Review and record initiatives relevant to training at other post-secondary institutions.	COMPLETE
4.1.4.2 Collaborate with areas of campus with their own EDI efforts	Year 0-1	Create a method for campus departments to record their EDI initiatives and request meetings with EDI staff or ask for support.	COMPLETE
		Share the method for campus departments to record their EDI initiatives and request meetings with EDI staff or ask for support.	COMPLETE
		Update the myUPEI EDI site to include role descriptions (including how they can assist various University departments) and contact information for all staff in the Department of EDI and Human Rights.	COMPLETE

		Staff from the Department of EDI and Human Rights will work with UPEI departments that request EDI training.	COMPLETE
		Staff from the Department of EDI and Human Rights will provide advice and/or support to other departments for their EDI efforts upon request.	COMPLETE
		Staff from the Department of EDI and Human Rights will meet with managers from across campus to learn about their EDI initiatives and EDI related needs.	COMPLETE
		Staff from the Department of EDI and Human Rights will Facilitate EDI Steering Committee meetings at least once annually to gather information about EDI initiatives occurring across campus from committee members.	COMPLETE
4.1.4.4 Create a new position responsible for equity, diversity, and inclusion training and education	Year 0-1	Post a hiring competition for a new position of Equity, Diversity, and Inclusion Training and Education Officer.	COMPLETE
4.1.4.5 Create a new position responsible for sexual violence prevention and education	Year 0-1	Post a hiring competition for a new position of Sexual Violence Prevention and Education Officer.	COMPLETE
4.1.4.8 President will consult with unions on an approach for implementation of the mandatory Preventing Sexualized Violence course for union members	Year 0-1	Consult with CUPE 1870 leadership regarding making the Preventing Sexual Violence course mandatory for their members.	COMPLETE
		Consult with CUPE 501 regarding making the Preventing Sexual Violence course mandatory for their members.	COMPLETE
		Consult with IBEW 1928 regarding making the Preventing Sexual Violence course mandatory for their members.	COMPLETE

		Consult with PSAC 86000 regarding making the Preventing Sexual Violence course mandatory for their members.	COMPLETE
		Consult with Faculty Association regarding making Preventing Sexual Violence course mandatory for their members.	COMPLETE
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	Year 0-1	Collect and record information from other post-secondary institutions, research databases, and/or community organizations on EdI, Human Rights, and Sexual Violence Prevention.	COMPLETE
4.1.5.2 Obtain information regarding experiences of other institutions with collection of workforce diversity information to inform future planning	Year 0-1	Review and record information about initiatives to collect workforce diversity information at other post-secondary institutions.	COMPLETED IN YEAR 0
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	Year 1-3	Meet with representatives from campus partners who serve underrepresented or marginalized groups on campus, including the International Students Office, Accessibility Services, and Student Affairs.	COMPLETE
4.1.6.2 Work with Human Resources to improve accommodations processes for faculty and staff and make the information easily available.	Year 1-3	Work with Human Resources to review and finalize an accommodation procedure for faculty and staff.	IN PROGRESS
		Make information about the accommodation procedure accessible to faculty and staff.	IN PROGRESS
		Share information about the accommodation procedure on the Human Resources web pages on upei.ca and myUPEI, and on the EDI site on myUPEI.	IN PROGRESS

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	Year 1-3	Convert the EDI in Employment Systems Advisor from a term position to a permanent appointment.	COMPLETE
4.1.6.4 Coordinate processes of student-related investigations among the offices of SVPRO and supports within Student Affairs	Year 1-3	Have the Sexual Violence Response Team meet to coordinate student-related investigations, and the supports related to sexual violence matters.	COMPLETE
		Have the staff within the Sexual Violence Prevention and Response Office hold regular meetings with Student Culture and Community Standards unit of Student Affairs to ensure staff have opportunity to coordinate activities on sexual violence.	COMPLETE
		Ensure that the Sexual Violence Prevention and Response Office process that refers clients to counselling in Student Affairs will include scheduling sensitive to both the Complainant and Respondent.	COMPLETE
4.1.6.5 Formalize cross-departmental coordination in relation to harassment, discrimination, racism, or sexual violence	Year 1-3	Have the staff within the Sexual Violence Prevention and Response Office hold regular meetings with Student Culture and Community Standards unit of Student Affairs to ensure staff have opportunity to coordinate activities on sexual violence.	COMPLETE
		Have the Human Rights Counsel hold regular meetings with Accessibility Services to ensure staff have the opportunity to share information to coordinate activities.	COMPLETE
		Have the Sexual Violence Response Team meet to coordinate the University response to sexual violence matters.	COMPLETE

		Have the Anti-racism and Cultural Diversity Project Officer hold regular meetings with the Student Culture and Community Standards unit, the International Student Office, and Residence Life to gather and share information, and/or coordinate student-focused antiracism and cultural diversity efforts.	COMPLETE
		Have the Anti-racism and Cultural Diversity Project Officer hold regular meetings with faculty- and staff-focused departments to gather and share information, and/or to coordinate staff- and faculty-focused anti-racism and cultural diversity efforts	COMPLETE
4.1.6.6 Work collaboratively with Deans/Associate Deans to provide advice and guidance on EDI initiatives led by/within Faculties	Year 1-3	Director of EDI and Human Rights to attend a Dean's Council meeting to discuss supports and services offered by the Department of EDI and Human Rights.	COMPLETE
4.1.7.1 Build capacity for informal resolution methods applicable to matters under the Sexual Violence Policy and a new Harassment and Discrimination Policy	Year 1	Post a hiring competition for a new position of Informal Resolution Specialist.	COMPLETE
		Have Informal Resolution Specialist work with Sexual Violence Prevention and Response Coordinator to consider best practices for informal resolution in sexual violence complaints.	Moved to Year 2

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

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

SUPPORTING ACTIONS	ACTION PLAN TIMELINE	IMPLEMENTATION ACTIVITIES	PROGRESS
4.2.1.1 Develop a policy that complies with all aspects of the PEI Non-disclosure Agreements Act	Year 1	Develop UPEI NDA policy that complies with PEI Non-Disclosure Agreements Act	COMPLETE
4.2.1.2 Commit to not using any 'fact of' language in any necessary NDAs	Year 1	Include in UPEI NDA policy a prohibition against "fact of" language in any necessary NDA.	COMPLETE
4.2.1.2 Make the policy easily accessible	Year 1	Post UPEI NDA Policy on UPEI website once enacted.	COMPLETE
4.2.2.1 Send regular reports to the Board of Governors on terminations and resignations, and if any were associated with NDAs	Year 1	Develop a report for the Human Resource Committee of the Board of Governors, that includes the number of terminations and resignations by union group, and whether any such terminations or resignations have associated NDA.	COMPLETE
		Beginning January 2025, provide a report for each meeting of the Human Resource Committee of the Board of Governors, which includes the number of terminations and resignations by union group, and whether any such terminations or resignations have associated NDAs.	COMPLETE

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

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

SUPPORTING ACTIONS	ACTION PLAN TIMELINE	IMPLEMENTATION ACTIVITIES	PROGRESS
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	Year 1-2	Draft a new Harassment and Discrimination Policy that covers all campus members and reflects the new structure of the Department of EDI and Human Rights.	COMPLETE
4.3.1.4 Ensure the new policy incorporates all recommendations of the UPEI Review	Year 1-2	Incorporate recommendations of the UPEI Review into the new Harassment and Discrimination Policy	COMPLETE
4.3.1.5 Ensures the new policy reflects feedback from survivors of harm at the University	Year 1-2	Include feedback from the UPEI Review, Action Plan Advisory Group Recommendations, and listening sessions held by the President to support the Action Plan, as considerations for the policy development process.	COMPLETE
		Request feedback from Fair Treatment Advocate under the Fair Treatment Policy on new Harassment and Discrimination Policy.	COMPLETE
		Request feedback from Sexual Violence Response Navigator on new Harassment and Discrimination Policy.	COMPLETE
		Ensure the new policy contemplates a process path for complaints against the President.	COMPLETE

		Have the Chair of the Board of Governors review the draft Harassment and Discrimination Policy to ensure input from former complainants has been appropriately incorporated.	COMPLETE
4.3.1.6 Ensure the policy is trauma-informed and procedurally fair	Year 1-2	Human Rights Counsel, with knowledge of procedural fairness, to ensure the new Harassment and Discrimination Policy is procedurally fair.	COMPLETE
		Have the draft policy reviewed by staff of the Department of EDI and Human Rights who have experience in applying a trauma-informed lens and take any concerns or recommendations into consideration in the draft policy.	COMPLETE
4.3.1.7 Ensure the new policy aligns with legislative requirements, such as PEI Occupational Health and Safety Act and Employment Standards Act.	Year 1-2	Obtain an opinion from external legal counsel to ensure that the new policy aligns with provincial legislative requirements (and if any applicable federal legislative requirements) including but not limited to the Occupational Health and Safety Act, Employment Standards Act, and Human Rights Act.	IN PROGRESS
4.3.2.1 Make the policy easily available to the campus community	Year 1	Once enacted, post the policy on the University website.	Moved to Year 2

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

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

SUPPORTING ACTIONS	ACTION PLAN TIMELINE	IMPLEMENTATION ACTIVITIES	PROGRESS
4.4.1.1 Finalize revisions to the UPEI Sexual Violence Policy	Year 1	Finalize the draft Sexual Violence Policy.	IN PROGRESS
4.4.1.2 Ensure the new policy is comprehensive and implements all the recommendations of the UPEI Review	Year 1	Ensure the final Sexual Violence Policy reflects the recommendations of the UPEI Review.	IN PROGRESS
4.4.1.3 Ensure the revised policy is trauma-informed, procedurally fair, and conforms to legislative requirements	Year 1	Obtain an opinion from external legal counsel that the new policy is procedurally fair and aligns with provincial legislative requirements (and if any applicable federal legislative requirements).	IN PROGRESS
		Have the draft policy reviewed by staff of the Department of EDI and Human Rights who have experience in applying a trauma-informed lens and take any concerns or recommendations into consideration in the draft policy.	IN PROGRESS
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	Year 1	Include the Sexual Violence Response Navigator and Assistant Manager, Residence Life, both of whom have experience working with victims on campus, on the Sexual Violence Review Committee.	COMPLETE
		Consider the Action Plan Advisory Group Recommendations, information from the listening sessions, and recommendations from the UPEI Review,	IN PROGRESS

		which included victim experiences, in revisions to the Sexual Violence Policy.	
		Have the Chair of the Board of Governors review the draft Sexual Violence Policy to ensure input from former complainants has been appropriately incorporated.	MOVED TO YEAR 2
4.4.2.3 Ensure training is provided to the Board, Senate, and Senior Executive Team on the new policy	Year 1-2	Once the new Sexual Violence Policy is enacted, arrange training for the Board of Governors, Senate and Senior Executive Team. Depending upon the date of enactment, this training could take place in Action Plan Year 1 or 2.	MOVED TO YEAR 2
4.4.2.4 Make the piloted Sexual Violence Response Team permanent and finalize terms of reference	Year 1-2	Include the Sexual Violence Response Team in the new Sexual Violence Policy.	IN PROGRESS
4.4.2.5 Strengthen and clarify pathway for respondent support	Year 1-2	Post a hiring competition for a new position of Manager of Student Culture and Community Standards within Student Affairs, whose responsibilities will include coordinating respondent support during Sexual Violence Prevention and Response Office investigations.	COMPLETE
		Have the new Manager of Student Culture and Community Standards begin providing respondent support.	COMPLETE
4.4.2.7 Provide investigation results to the respondent's internal support provider	Year 1-2	Post a position for a new position of Manager of Student Culture and Community Standards within Student Affairs, who will be prepared to provide internal support for student respondents.	COMPLETE

		Have the Sexual Violence Prevention and Response Office provide investigation reports involving student respondents to the Manager of Student Culture and Community Standards in all cases, except where the respondent objects to the involvement of Student Affairs.	COMPLETE
		If authorized by the respondent, provide investigation results to the respondent support provider.	MOVED TO YEAR 2
4.4.3.1 Make the policy easily available to the campus community	Year 1	Once enacted, post the policy on the University website.	MOVED TO YEAR 2
4.4.4.3 President will consult with unions on an approach for implementation of the mandatory Preventing Sexualized Violence course for union members	Year 0-1	Consult with CUPE 1870 leadership regarding making the Preventing Sexual Violence course mandatory to their members	COMPLETE
		Consult with CUPE 501 regarding making the Preventing Sexual Violence course mandatory to their members.	COMPLETE
		Consult with IBEW 1928 regarding making the Preventing Sexual Violence course mandatory to their members.	COMPLETE
		Consult with PSAC 86000 regarding making the Preventing Sexual Violence course mandatory to their members.	COMPLETE
		Consult with the Faculty Association regarding making the Preventing Sexual Violence course mandatory to their members.	COMPLETE

4.4.5.1 Collect statistical information on sexual violence disclosures from a victim-centered lens	Year 0-1	Continue to populate the Sexual Violence Prevention and Response Office case monitoring document (or any system which replaces it).	COMPLETE
4.4.5.2 Implement process to allow monitoring of trends	Year 0-1	Continue to use and maintain Sexual Violence Prevention and Response Office case monitoring document (or any system which replaces it).	COMPLETE

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

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

SUPPORTING ACTIONS	ACTION PLAN TIMELINE	IMPLEMENTATION ACTIVITIES	PROGRESS
4.5.2.1 Review processes regarding violence, sexual violence, harassment, and discrimination to ensure they are designed reflecting principles of safety and respect	Year 0-5	Review the UPEI Violence Prevention and Response Policy: Ensuring a Safe Campus Community to ensure PEI Occupational Health and Safety Workplace Violence Prevention Regulations are met.	COMPLETE
4.5.2.2 Create pathways for sexual violence or harassment and discrimination disclosures and complaints that are clear	Year 0-5	Draft a new sexual violence policy and harassment and discrimination policy that include pathways for disclosure and complaints.	IN PROGRESS



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