



UNIVERSITY  
of Prince Edward  
ISLAND

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

MARCH 27, 2024





## **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.

## APOLOGY TO THE UPEI CAMPUS AND COMMUNITY MEMBERS

The *University of Prince Edward Island Review (UPEI Review)* released in June 2023 revealed a culture at UPEI that has not lived up to the values that we put forth as an institution of higher learning and as a workplace dedicated to fair and inclusive treatment.

The *UPEI Review* recounts troubling incidents that have impacted our employees and students over many years. The review expresses important concerns about the need for improved policies and procedures on harassment, discrimination, and sexual violence.

Through the review, concerns with clarity and consistency of UPEI policies, processes, and practices were identified. As a result, the review outlined recommendations to significantly strengthen these areas and highlights further areas in which the University must demonstrate accountability in order to rebuild trust and build a safe work and learning environment.

We regret that, as an institution, we have not always lived up to our values and failed to create a safe, respectful, and positive environment for all members of the UPEI community. We apologize for the harms caused to members of the University community as a result of these failures.

The *UPEI Review* provides a number of recommendations that have been identified as crucial to strengthening the University's practices and policies, and to address any current conditions that do not reflect UPEI's values. As leaders of the UPEI Board of Governors and current University leadership, we are appreciative of these recommendations.

We acknowledge the bravery of those individuals who have come forth to share their experiences resulting from the failings of our institution. In particular, we recognize Dr. Wendy Carroll and Erin Casey, as well as the individual who came forth in 2021, for their contributions to improving UPEI. We are committed to learning from, and reconciling with them and others

who have experienced harm, and with all members of our community. We are humbled by the trust they have placed in us. We recognize that rebuilding trust requires continual, demonstrated effort and open dialogue with our many community members.

We are committed to doing the hard work necessary to earn our community members' trust.

The University and the UPEI Board of Governors are committed to the values outlined in our Strategic Plan and our Equity Diversity and Inclusion Strategy. The accountability provisions of the Action Plan represent a further commitment to protecting members of the community from discrimination, harassment, and sexual violence, and to building an inclusive environment on our campus.

We understand that we must do better and that we are accountable for encouraging and enabling the changes needed for UPEI and its people.



**Shannon MacDonald**, FCA, CPA, ICD.D (she/her)  
Chair, UPEI Board of Governors



**Greg Keefe**, DVM, MSc, MBA (he/him)  
President and Vice-Chancellor (Interim)

## OUR MISSION

The University of Prince Edward Island, founded on the tradition of liberal education, exists to encourage and assist people to acquire the skills, knowledge, and understanding necessary for critical and creative thinking, and thus prepare them to contribute to their own betterment, and that of society, through the development of their full potential. To accomplish these ends, the University is a community of scholars whose primary tasks are to teach and to learn, to engage in scholarship and research, and to offer service for the benefit of our Island and beyond.

## OUR VISION

UPEI will be a leader in providing outstanding programs and experiential learning opportunities that enable our students to develop to their full potential in both the classroom and the community, ensuring our students emerge from their studies ready to excel and contribute to the betterment of our world.

## OUR VALUES *(listed alphabetically)*

### ACADEMIC FREEDOM AND RIGOUR

The freedom to teach and conduct scholarly work guided by curiosity and intellectual inquiry, without deference to prescribed doctrine, is fundamental to our University. This freedom is essential to advancing and disseminating knowledge, and carries with it the duty to use that freedom in a manner that is consistent with an honest search for knowledge. It is important for the credibility of the University that this quest for knowledge is carried out with integrity and rigour.

### ACCOUNTABILITY AND INTEGRITY

As individuals and as a community, we are accountable to those we serve for the quality of education we deliver and the transparency of our operations. We will conduct ourselves with integrity, employing our expertise to serve others and benefit society.

## EXCELLENCE

We aspire to excel in education, scholarly endeavours, research, and service.

## EQUITY, DIVERSITY, INCLUSION, AND RECONCILIATION

We are dedicated to making UPEI an open, accessible, and welcoming community, and to the fair treatment of all persons. We are committed to continually re-examining and growing our understanding of the role UPEI must play in promoting a better understanding of cultures and identities, and the needs of community members with disabilities in a manner that supports education and respectful relationships.



## THE SEVEN SACRED TEACHINGS

*“The traditional concepts of respect and sharing that form the foundation of the Indigenous way of all life are built around the Seven Sacred Teachings. Each teaching honours one of the basic qualities that are necessary for a full and healthy life. Each law is represented by an animal to show the connection between the animal world, the environment, and people.”*

– Teachings of the Seven Sacred/Seven Grandfathers,  
Ontario Native Literacy Coalition

The Seven Sacred Teachings are our guiding principles in the collaboration towards restoration of the Indigenous cultural values, beliefs, and practices that were forbidden:

Love  
Respect  
Courage  
Honesty

Wisdom  
Humility  
Truth









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Happy Holidays

Happy  
Holidays



UNIVERSITY  
OF  
PRINCE  
EDWARD  
ISLAND

5th Floor Building  
(CME)





## SUMMARY

In December 2021, the UPEI Board of Governors retained a Canadian law firm to conduct an independent third-party review of UPEI's policies, procedures, and programs concerning harassment, discrimination, and fair treatment.

In addition, the firm was retained to conduct an investigation into allegations that were brought to the University's attention concerning the former president.

Throughout 2022, the firm carried out surveys and interviews with current and former UPEI faculty, staff, and students. Surveys focused on a review of the culture on campus. Of those surveyed, 1,295 responses were received. In addition to surveys, 163 one-on-one interviews were conducted with current and former UPEI faculty, staff, and students. What was learned through these surveys and interviews formed the basis of the *University of Prince Edward Island Review (UPEI Review)* and the multiple recommendations that accompanied the report.

In June 2023, UPEI released the *UPEI Review* to the campus community and the public. To protect the privacy of those who participated in the review's confidential surveys and interviews, the public report contained redactions. Redactions within the report were made by an external legal counsel with expertise in privacy requirements.

The details outlined within the *UPEI Review* were incredibly difficult for the UPEI community.

The report outlined deeply troubling incidents of harassment, bullying, toxicity, discrimination, and unfair treatment that occurred on campus over a number of years. The incidents have deeply impacted individuals, the campus community, and UPEI's overall culture.

**The *UPEI Review* highlighted a difficult truth: the University and those with accountability for its oversight had failed to ensure that the University lived up to its institutional values—in particular, the values of inclusion, equity and reconciliation, and its commitment to fair treatment and respectful relationships.**

The *UPEI Review* outlines how immediate change is needed in relation to policies, procedures, and overall workplace safety. The need to rebuild trust and safety on campus was identified as being imperative to improving UPEI's work and educational environments, and the overall culture of UPEI.

UPEI is committed to making the changes needed to enable the University and its community to move forward.

UPEI recognizes that the road to healing and rebuilding has to be authentic, meaningful, and informed by ongoing consultation with members of our campus. Based on what the University has learned over the past months, there is a strong understanding that a mandate to change is not enough. Clear actions and a new level of accountability to implement actions are needed.

**Since early 2020, UPEI employees and students have experienced a series of rolling crises: the global pandemic; a hurricane of historic proportions; disruptions to teaching, learning, and work; leadership dismissals and changes; a strike; and the release of the *UPEI Review*.**

**Asking UPEI community members to come together yet again—following the release of the *UPEI Review*—tested UPEI on a level that the institution had never experienced before.**

And yet community members did, and continue to, come together.

Collectively, our campus community has been clear in its message: UPEI must do better. UPEI must be accountable and transparent in developing and putting in place actions needed to ensure trust, safety, and responsibility within its work and learning environments.

Further, our community has expressed that the road to healing and rebuilding must recognize two overarching needs. The first being a recognition that the UPEI Board of Governors has to regain the confidence of the University and broader communities. The second being a commitment to timely actions.

The plan and actions that follow are UPEI's response to the *UPEI Review* and recommendations. The plan is informed by the feedback and candid dialogue that has taken place with UPEI campus and community members over the past eight months.

In alignment with the guidance and expectations of our community, the plan focuses on accountability. In support of this focus, plan elements and actions are developed to build our campus culture in a way that ensures inclusion, safety, fair treatment, and respect are part of everyday work and learning experiences at UPEI.

## **RECOGNIZING THE NEED FOR CHANGE AND ACCOUNTABILITY**

The need for UPEI to develop a comprehensive plan to address the problems identified within the *UPEI Review* is a key deliverable of the report. The *UPEI Review* outlines the expectation that the development of the plan would follow a highly consultative framework of internal and external consultation of those impacted as well as engaging with experts to help address recommendations “...aimed at ensuring that the University provides its community members with a safe environment for working and learning, and enhancing the University's response to harassment,

*discrimination, fair treatment, and sexual violence.”* (Rubin Thomlinson LLP, *UPEI Review*, June 2023, p. 73)

Since the release of the *UPEI Review* and recommendations, UPEI has worked to demonstrate its commitment to listen, learn, and rebuild. This includes recognizing the roles that accountability, transparency, and respect play in every step of the path forward.

This process has been challenging on many levels.

The greatest challenge has undoubtedly been asking people—co-workers, colleagues, students and, in many instances, friends and neighbours—who have experienced harm and challenges to engage with UPEI in a process to help change the culture. This is a significant request considering the extent of harm outlined in the *UPEI Review* and challenges of the past few years. However, the campus community did engage. And the honesty and courage of our community members has been overwhelming.

Although discussions alone do not resolve the challenges, the willingness of our community to come together to share their experiences, listen to each other, and address difficult truths has enabled the campus community to begin the process needed for healing and finding a way forward.

These discussions have provided UPEI with a very clear mandate to vastly improve its culture. In doing so, UPEI must deliver on a new level of accountability for developing and delivering on actions to ensure trust, safety, and responsibility within its work and learning environments.



## CONSULTATION PROCESS

The consultation process following the release of the *UPEI Review* has focused on bringing campus community members together through town halls, the development of a UPEI Action Plan Advisory Group with broad community representation, and campus listening sessions.

Following the release of the *UPEI Review* and recommendations, UPEI held a town hall for faculty and staff. The purpose of the town hall was for members of the University community to speak about UPEI's culture, climate, and the *UPEI Review*.

What the University heard during the town hall was an overwhelming reflection of how deep the personal and collective hurt was on campus. Although the day was intended to be the start of a journey of enabling the campus to move forward, it was quickly acknowledged that more listening was needed to enable healing.

UPEI immediately put in place more supports for the campus community, including additional in-person and remote counselling resources and disclosure pathways. To better understand campus members' experiences and where changes were urgently needed, an additional town hall for staff was scheduled.

In the coming days and weeks, the UPEI community moved through what many employees likened to a grieving process. Individually and collectively, members dealt with anger, humiliation, re-living harm, questioning their faith in the institution and its leaders, seeking supports, wanting to understand how such events could take place, demanding accountability, and determining how to move forward.

The second town hall for University staff members followed. With this second meeting came a clearer picture of foundational, day-to-day

challenges throughout the University that ranged from unfair treatment; scarcity of people, resources, and processes; inequities in employee groups; and lack of access to information and processes to enable people in their roles.

Town hall consultations revealed long-term unresolved challenges that had resulted in the development of a culture that made people feel that they were not valued, did not have a voice or the ability to report challenge or encourage change, and lacked clear leadership and supports.

Dedicated employees who support students, collaborate with colleagues, contribute to the University's development, and build community partnerships expressed feeling defeated and embarrassed by the impact of the review on their service and careers. At the same time, employees were grateful for the support of many in the community who spoke up to recognize the positive and valuable contributions of the University and UPEI employees that reach beyond the problems outlined in the review.

Alongside an urgent need for remediation in a number of areas, a sense of pride in UPEI, its role, and contributions remained with many campus members, alumni, and students.

Based on collective feedback, UPEI established additional consultation processes through the UPEI Action Plan Advisory Group and campus listening sessions to gather further input on UPEI's climate and changes needed to rebuild trust and safety.

Upon completion of the campus listening sessions and UPEI Action Plan Advisory Group consultations in late 2023, UPEI developed a preliminary draft of the action plan framework. This early draft was shared with the campus and broader community for further feedback from January 3–17, 2024.

Public consultation provided an opportunity to gather additional candid input on strengths and weaknesses of the draft. This feedback strongly aligned with input from previous consultation efforts, helping to reinforce the direction of the planning and the need for accountable and transparent decisions and investments to change UPEI's culture, rebuild trust, and improve safety.

The resulting action plan is informed significantly by the feedback and guidance of the Advisory Group and listening sessions, and public consultation on the preliminary draft.

## **UPEI ACTION PLAN ADVISORY GROUP**

### **Establishment of the Advisory Group**

In response to the recommendations outlined in the *UPEI Review* and initial town hall sessions, UPEI committed to the development of an Advisory Group with broad community representation to provide feedback on the development of the UPEI Action Plan. To encourage broad perspectives and input, UPEI encouraged community members with an interest in contributing to the consultation process to indicate their interest in participating through an open call for expressions of interest. In addition, unions representing unionized faculty and staff at UPEI each had the opportunity to appoint a member to be a part of the Advisory Group.

The University accepted expressions of interest from UPEI faculty, staff, and undergraduate and graduate students, as well as members of the UPEI Alumni Association and the broader community. Members of the group were selected with an EDI lens based on their statement of interest in participating and their ability to attend meetings. Groups such as the UPEI Student Union, UPEI Graduate Student Association, and UPEI Alumni Association were also consulted in relation to representatives for their respective areas.

### **Advisory Group Membership**

#### ***Appointed Members***

Margot Rejskind (appointed by UPEI Faculty Association)  
Jaclyn Borden (appointed by CUPE 1870)  
Dave Csernyik (appointed by CUPE 501)  
MJ Rogers (appointed by IBEW 1928)

#### ***Members via Expression of Interest***

##### UPEI Students

Nicole Jay (Undergraduate Student)  
Saugat Shrestha (Undergraduate Student)  
Sasha Nandlal (Graduate Student)  
Nabeel Zafar (Graduate Student)

##### UPEI Faculty

Blake Jelley

##### UPEI Staff

Shannon Snow  
Missy Chareka

##### UPEI Deans

Nola Etkin  
Miles Turnbull

##### UPEI Alumni

Sharon Anderson  
June Jenkins Sanderson

##### PEI Community Representatives

Sobia Ali-Faisal  
Eileen Conboy  
Lucky Fusca  
Jane Ledwell  
Karen MacDonald  
Sharon O'Brien



## Consultation Process and Mandate

Composed of internal and external community representatives, the Advisory Group held two orientation meetings (September 27 and October 4, 2023) followed by weekly, four-hour- long consultations meetings from October 11 to November 29, 2023.

Led by a third-party facilitator, Sara Roach Lewis, the Advisory Group was mandated to:

- reflect on the *UPEI Review* and recommendations;
- provide multi-stakeholder perspectives on the issues; and
- provide feedback to help inform the development of the UPEI Action Plan to address the recommendations of the report.

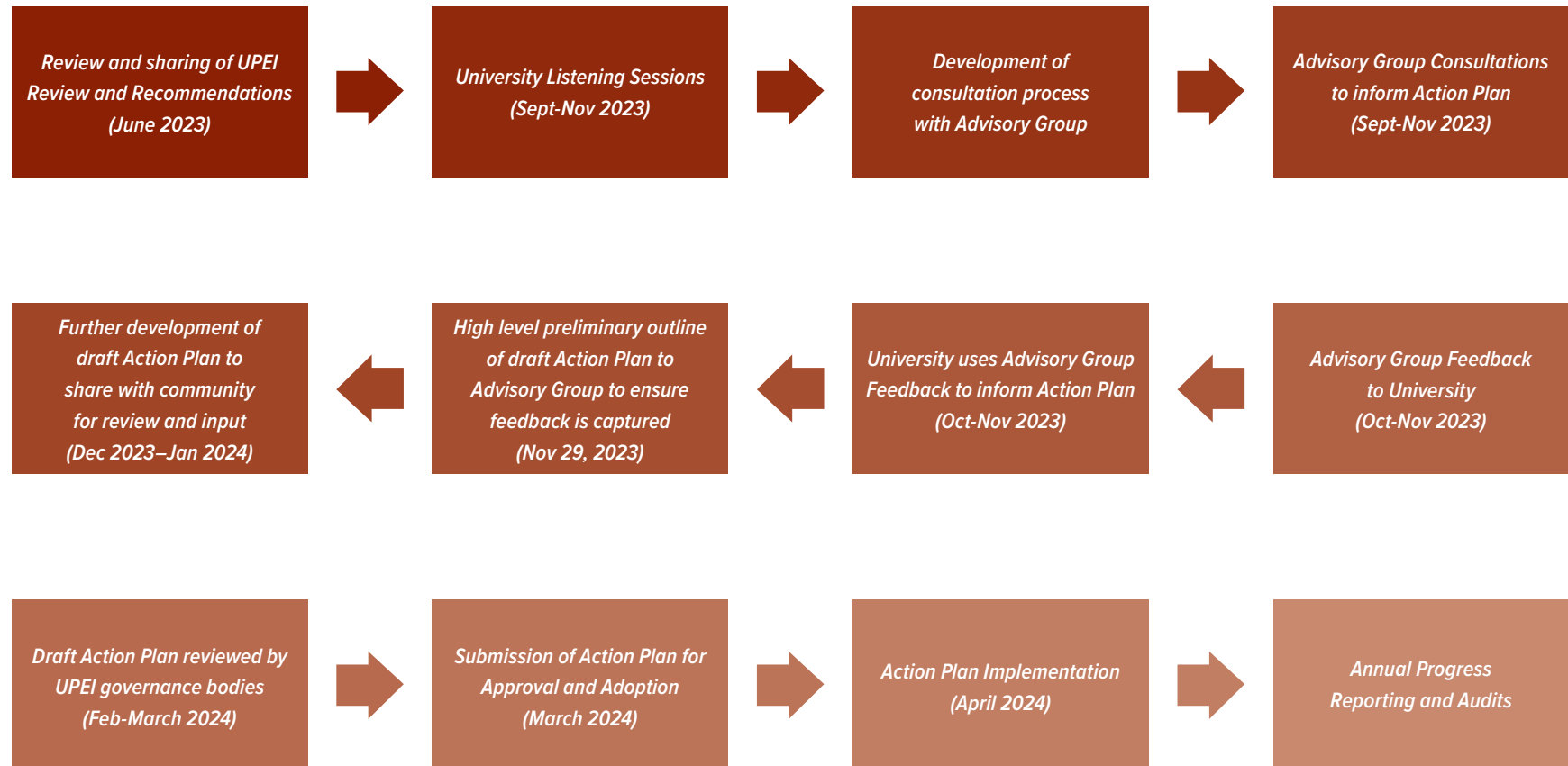
In total, the Advisory Group collectively spent more than 650 hours reflecting on and discussing the recommendations of the *UPEI Review*. In doing so, it has provided thoughtful input and guidance on ways UPEI must challenge itself to recognize and address barriers that are preventing the University from living its institutional values. In addition, the Advisory Group has provided valuable input into what accountability needs to look like in order to rebuild trust and safety within UPEI's work and learning environments.

**For transparency and to ensure that the Advisory Group's voice and considerable work is accurately reflected, the consultation overview and feedback for each recommendation (as prepared by the Advisory Group) is provided in its entirety in Appendix 2 – UPEI Action Plan Advisory Group: Overview and Guidance.**

Advisory Group feedback and guidance was informed by a broad group of UPEI and community members with diverse and relevant experience. Within the group are members with expertise in areas relating to EDI, sexualized violence, and racism. Biographies of UPEI Action Plan Advisory Group members can be found in Appendix 2.

The process was developed to serve as a high-level guide to consultation, information sharing, and drafting of the UPEI Action Plan in response to the recommendations of the *UPEI Review*.

The following illustrates some of the key steps undertaken since the release of the *UPEI Review* in June 2023. Since the development of the process several months ago, action plan development has stayed true to its approach with only minor adjustments due to time challenges.



## LISTENING SESSIONS

Alongside the work of the Advisory Group, UPEI's interim president held a series of campus listening sessions from September 25 to November 20, 2023. The purpose of these sessions was to learn more about faculty, staff, and student experiences as well as their concerns and suggestions on how to improve the climate and culture on campus.

The listening sessions enabled members of the campus community to express their views and provide candid input regarding the *UPEI Review* and recommendations directly to the interim president without their supervisors in the room.

Listening sessions included feedback relating to three specific questions:

1. How can we make our learning and work environment safer?
2. How do we build a more trusting and respectful environment on campus?
3. In addition to the information shared on steps the University is taking to address the report and recommendations, what other information do people feel is needed to help them on a daily basis?

Over approximately two months, 16 listening sessions were held across campus. Through these sessions, more than 350 campus members provided candid insights, asked questions, raised concerns, and challenged University leadership to take action to improve UPEI's workplace culture and learning environments. The input—which was often provided with emotion and a sense of urgency for change—provided clear insight into the work and learning environments at UPEI.

Listening sessions took place with community members from the following groups:

- Faculty of Education
- Faculty of Nursing
- Faculty of Business
- Faculty of Arts
- Faculty of Indigenous Knowledge, Education, Research, and Applied Studies
- Robertson Library
- Faculty of Science
- Faculty of Veterinary Medicine (2)
- Faculty of Sustainable Design Engineering
- UPEI Students
- Staff reporting through the Vice-President Academic and Research portfolio
- Staff within Facilities Management
- An additional session for staff members unable to attend other scheduled sessions
- Staff reporting through the Vice-President Administration and Finance, Vice-President People and Culture, Chief Information Officer, and Office of the President portfolios
- Staff within the Atlantic Veterinary College

### Listening Sessions: Lessons learned and expectations for the future

In responding to the guiding questions for the listening sessions, faculty, staff, and students provided feedback that related to campus issues ranging from day-to-day operations to changes needed to improve the culture of the University over the long-term.

Some of the key themes that surfaced during listening sessions included: accountability; the need for more effective policies and processes; the



priority of effective training for leadership and those supervising others; a strong indication of the expectation for mandatory training for all campus members on prevention of sexual violence; greater transparency and collaborative decision making; better information sharing and communications practices on campus; the need for more staff and resources for day-to-day operations; the need to value and respect people more; and the need for better ways to address micro-aggressions and provide conflict resolution pathways.

The table that follows provides some common themes and points of feedback relating to the three discussion questions outlined in the listening sessions. Efforts have been made to summarize multiple points of feedback into collective topics to provide a sense of the range of input shared by the campus community. For ease of assessment, items are grouped by themes and placed in the column to which they relate the most. It should be noted that some comments are related to more than one theme.

## Listening Sessions: Themes and Feedback

How can we make our learning and work environment safer?	How do we build a more trusting and respectful environment on campus?	In addition to the information shared previously regarding report recommendations, what other information do people feel is needed to help them on a daily basis?
<b>Leadership</b>		
Expected behaviour needs to start at the top. University leaders (including members of the Board and Senate) need to model the behaviour expected across campus and be part of the change process from a University governance standpoint.	The Board of Governors and senior leadership need to regain trust by committing to improving governance and following through on actions and commitments needed to improve the culture on campus. There was a significant impact on trust on campus due to the labour dispute, which is still being felt.	Leadership needs to collaborate more fully so campus members have a voice in planning and decision-making, including budgeting. Actions related to sustainability need to be considered.
Leadership needs to demonstrate that 'bad' behaviour, including micro aggressions, that harms people and the work culture will not be tolerated. More process communication, early intervention and prevention is needed.	UPEI leadership needs to recognize how hard events over that last number of years have been on employees and the impact on morale and campus engagement. Efforts need to be made by UPEI leadership to help rebuild a sense of community. A strong apology would be a meaningful start.	The presidential search process needs to be transparent and demonstrate a focus on ensuring the next president is truly committed to EDI and has been thoroughly vetted. This includes providing the campus with opportunities to receive updates and provide input.
The Board and University Leadership need to be aware of the level of trauma and burnout on campus and the impacts this has on physical and mental health, and a sense of physical and psychological safety on campus.	Make minutes of Board of Governors and Senate meetings more accessible and transparent so the campus community understands decisions and actions being made at the highest levels.	Ongoing listening sessions with the president without supervisors present would be helpful. Demonstrate that when input is sought, that it is heard and considered—and, ideally, acted on.
<b>Training</b>		
Strong indication from all areas of campus community that training on Preventing Sexualized Violence should be mandatory for all campus members. Leadership (including Board) should set example for this and other training.	EDI training should be more accessible to everyone and included in onboarding of new employees at all levels. Everyone, including lawyers advising the University, need to be trauma-informed.	Employee groups are eager for more access to training, skills development, and professional development opportunities to enable them to carry out their roles and further develop both professionally and personally.
Making bystander training accessible for all campus members would be beneficial.	A broad range of training needs to be provided for those supervising others and with decision-making authority.	

## Listening Sessions: Themes and Feedback *[cont.]*

Safety		
More security is needed on campus—especially at night and in certain areas of campus that have classes, services, and activities stretching into the evenings. Isolated areas of campus need security improvements (lighting/cameras) and security presence.	Some groups on campus are protected while some are not. The inequities cause problems in how people feel valued, in development opportunities, job security, and how they are ‘allowed’ to treat others.	The University needs to do more to support people who reach out looking for help to navigate fair treatment processes/reporting.
Resources need to be added immediately to SVPRO and EDI offices to improve processes and supports, including education and awareness.	People need to trust that systems work and that offenders/repeat offenders that are still on campus are being dealt with in the appropriate manner.	Psychological safety needs to be recognized and addressed within overall health and safety at UPEI.
More clarity is needed around imbalances of power as they relate to students and faculty. Steps need to be taken to help students who experience a lack of safety in the classroom.	There is an urgent need for the Fair Treatment policy to be updated so that staff members feel protected in making reports and speaking up.	The health, safety, and wellbeing of students in clinical and experiential learning placements external to the University needs to be considered.
Use best practices and lessons learned from the hard experiences of UPEI and other universities to improve safety and a better culture at UPEI.	UPEI needs to ensure that people (especially senior administrators and faculty members) who have harmed others on campus are not protected by collective agreements, policies, or NDAs in a way that allows them to continue to harm.	The condition of physical space on campus contributes to employee morale and student learning and experiences.
Gender neutral bathrooms need to be up to standard.	Racism, bullying, sexual violence, and gender-based violence should not be tolerated or excused on any level. Campus wants to be confident that harm is being addressed.	
Communication		
Communications need to be timelier and more transparent, so campus members are aware of University planning, initiatives, and issues. Communication needs to be concise and clear.	More information on university risk management so that employees know what the University views as risk and the implications within their day-to-day roles.	Simplify or better explain campus processes. Processes in areas such as hiring, budget, onboarding, research services can be overly complicated and frustrating.
The UPEI SAFE app needs to be kept up to date. Campus members need to know about its features to support safety on campus.	Additional communication, support, and training is needed around institutional change processes and online systems.	Communication on decisions, new processes, reasons for changes are needed to help guide work.



## Listening Sessions: Themes and Feedback *[cont.]*

Employee Engagement		
Many staff members feel they are not able to work to their full scope due to management approaches and lack of resources. Inequities across campus are noted by many as staff are often treated much differently than faculty on many levels.	Many staff feel there is significant inequity and a lack of respect for their contributions and roles. More collaboration and respect are needed on campus from all levels, in all directions.	UPEI should consider using the Seven Sacred Teachings as guiding principles for the University.
Employees need pathways to provide feedback on supervisors' performance in a timely and confidential manner.	Staff need to feel valued through development opportunities, being treated with respect, and having access to the supports and tools they need to do their jobs.	More data collection is needed across the University to inform decision making. There needs to be ongoing opportunities to provide input and feedback.
The number of ongoing contract positions leave some employees dealing with stress and anxiety, as well as being vulnerable to reprisal.	The HR classification system needs to be reviewed as it is seen as a major barrier to staff development and morale. Existing staff expressed concern regarding new-hire classification of positions of comparable scope and function.	Employees, alumni, and students continue to have a great deal of pride in UPEI. People want students to succeed and be proud of their UPEI experience. The culture and reputation need to be rebuilt to support this pride.
	Provide mentorship for staff members within units and across campus.	The Healthy Campus Committee should expand its scope beyond fitness.

## DEVELOPMENT OF THE UPEI ACTION PLAN

Using the lens of the Advisory Group's input from its ten-week consultation process, feedback from campus listening sessions, consultation with government partners, feedback from the public consultation phase, and ongoing dialogue with the Chair of the UPEI Board of Governors and members of UPEI's leadership team, UPEI has developed key goals and actions in response to the *UPEI Review* recommendations.

The UPEI Action Plan provides a framework for how the University will respond to the recommendations outlined in response to the focus areas within the UPEI Review: Accountability and Acknowledgement; Strengthen Leadership; Other Culture Initiatives; and Improve Policies and Practices.

Within the Action Plan, UPEI has identified priority goals, corresponding actions, overall accountability, and the implementation timeframe for following through on actions. To support the action plan framework, implementation plans will be developed to support the execution and evaluation of actions and initiatives in support of the goals.

To support UPEI Review recommendations, UPEI has identified priority goals and corresponding actions. As execution planning is developed, additional detail will also be outlined, including:

- overall accountability for the action,
- campus partners responsible for implementation,
- required resources,
- identified challenges,
- implementation timeframe, and
- measurable and observable evaluation metrics.

**In many ways, the UPEI Action Plan is a pledge to members of our campus that we recognize that things must change. Understanding that**

**intention does not equal impact means that UPEI leadership must be diligent in living up to its commitment to make the incremental changes and investments needed to establish a new culture that is anchored by the values of inclusion, accountability, transparency, and respect for all members of campus.**

As indicated by the Government of Prince Edward Island, the UPEI Action Plan will be audited on an annual basis for five years. The auditor will be determined in consultation with provincial government partners. UPEI will post the audits to its website for transparency.

**The feedback and guidance of our community members and the Advisory Group makes it clear that the core components of the UPEI Action Plan must be accountability and transparency.**

The UPEI Action Plan will be an ongoing priority of the UPEI Board of Governors and UPEI President. As a priority, UPEI will be committed to the development, implementation, and evaluation of plan elements to ensure the University achieves the needed change in climate and culture required to enhance trust and safety within UPEI work and learning environments.

**UPEI recognizes that accountability and transparency are required throughout the process and over the long-term to ensure trust in people, processes, and priorities while responding to the *UPEI Review* recommendations.**

In keeping with the recommendations of the *UPEI Review* and the expectations of community members, UPEI is committed to timely progress reporting on actions outlined in the Action Plan.

## UPEI ACTION PLAN FRAMEWORK

As an institution of higher learning, UPEI is committed to expanding knowledge and discovery, contributing to personal and societal growth, and helping to foster the critical thinking and skills needed to address the challenges of our world.

Our purpose in developing personal and community growth is steadfast.

However, with the release of the *UPEI Review* in June 2023, our University was faced with the stark awareness that we had failed to live up to [our institutional values](#)—especially those related to inclusion, accountability, and integrity. As a result, members of our campus community have experienced various forms of harm and difficulties, rather than feeling supported and protected.

Over the past six months, UPEI has learned a great deal about what is needed to acknowledge and accept accountability for the harm that has occurred and what our community expects as we work to build a better educational and work environment.

### A Commitment to our Community

The UPEI Action Plan is a commitment to support the *UPEI Review* recommendations and calls to action to provide campus members with a safe working and learning environment. The Action Plan focuses on changes and initiatives needed for our University to enhance equity and inclusion on campus, as well as UPEI's response to fair treatment, harassment, discrimination, and sexual violence.

Overall, the intent of the Action Plan is to achieve a cultural shift that is needed to ensure our people feel valued, supported, and have a sense of safety on campus. This includes changes related to University policies and

operations and, where necessary, structures. Through our promise to learn from the mistakes of the past, we are committed to creating a stronger future.

Based on the overall input of our community, UPEI's senior executive team (consisting of the President, Vice-Presidents, and Chief Information Officer) has developed goals and actions that are meant to build a pathway for a significantly improved campus environment.

The actions outlined respond to the recommendations of the *UPEI Review* and have been informed by consultation with the UPEI community through town halls and listening sessions, and the broader community through the UPEI Action Plan Advisory Group, and public consultation on the preliminary draft plan.

Knowledge gained from other campus priorities that are underway, such as the development of UPEI's Indigenous Strategic Framework: *Pesk'tek—The Path Ahead: The Journey to Reconciliation and Action Reform*, will also provide valuable guidance for the action plan. Based on its consultation, the Action Plan Advisory Group has provided input for UPEI to consider in relation to building trust and safety on campus for Indigenous members of our community. As a component of the Action Plan, the University is committed to engaging in ongoing consultation with Indigenous campus members and groups regarding our reconciliation journey and how to best consider the principles of the Seven Sacred Teachings in guiding discussions to improve campus culture.

Together, we remain steadfast in our mission as a University and in our vision to develop our students to their full potential in both the classroom and the community. We are eager to take the steps needed to re-commit to our purpose and values as a higher learning institution and employer.

To deliver on the development and implementation of actions outlined within the UPEI Action Plan, the plan will be audited annually. The plan and audit results will be posted publicly for transparency and accountability.

### **Foundational Components of the UPEI Action Plan**

*To be accountable to our diverse work and learning community, UPEI will:*

- hold leaders to a higher standard of accountability,
- build institutional capacity to better support key supports and services,
- ensure we have best-practice informed policies and processes in place to promote day-to-day experiences at UPEI that are anchored by a commitment to equity, diversity, and inclusion, and the safety of campus members,
- work to address systemic barriers to inclusion and fair treatment that have been identified in our work and learning environments, and reestablish our commitment to upholding the core values of our University.

As encouraged by the UPEI Action Plan Advisory Group guidance, UPEI has worked to develop actions that:

- have intersectionality as the starting point,
- are trauma-informed,
- are evidenced-based,
- are mindful of power dynamics and imbalances,
- are properly resourced, and
- are supported and enabled with strong communications.

### **Anticipated Challenges**

It is recognized that developing and implementing the actions outlined in the plan will not be without challenges. Securing additional financial and

human resources will be required. In addition to increasing overall staff capacity, the University will need to build additional expertise in specialized aspects of EDI and sexual violence prevention.

As indicated in the UPEI Action Plan, new policies and processes also need to be developed in response to *UPEI Review* recommendations related to fair treatment, harassment, discrimination, and sexual violence.

As these policies are implemented, strong collaboration and communication with campus members will be needed to ensure workflows are aligned and new processes and supports are easily understood and accessed by our community.

An enhanced level of accountability and transparency will be fundamental to the implementation and overall success of the Action Plan. UPEI's focus on accountability and transparency includes a commitment to ongoing consultation and information sharing with campus members around initiatives to improve our work and learning environments, as well as annual audits. Overall, a high level of campus engagement will be needed to enable the cultural shift we aspire to achieve.

To support the Action Plan, the UPEI senior executive will lead the development of implementation plans for their areas of responsibility. These implementation plans will further develop the actions and goals and outline how the actions will be operationalized; progress made on the implementation plans will form the subject of the annual audits.

UPEI is committed to identifying, communicating, and meeting these challenges to the best of its ability in an effort to address the need for change.



## UPEI ACTION PLAN: GOALS AND ACTIONS

The UPEI Action Plan addresses the recommendations of the UPEI Review as well as feedback from campus and community consultations with the goal of rebuilding trust and safety and creating an improved campus culture at UPEI.

### Goal 1

**Acknowledge and demonstrate accountability for the issues within the UPEI Review**

#### *Actions*

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

### Goal 2

**Strengthen UPEI's governance and leadership structure**

#### *Actions*

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

### Goal 3

**Improve UPEI's campus culture**

#### *Actions*

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

### Goal 4

**Put in place new policies and processes that focus on preventing and addressing discrimination, harm, and violence at UPEI**

#### *Actions*

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

The actions outlined in the tables that follow have been developed by the UPEI Senior Executive Team which consists of: the President; Vice-President Academic and Research; Vice-President Administration and Finance; Vice-President People and Culture; and Chief Information Officer.

The actions are:

1. informed by UPEI Review recommendations, feedback from campus listening sessions, Advisory Group guidance, UPEI partner consultations, and public consultation on the preliminary draft plan;
2. aligned to specific UPEI roles for development, implementation, and accountability purposes; and
3. provided with best estimate implementation timeframes for the next five years for audit purposes.

## UPEI ACTION PLAN IMPLEMENTATION AUDITS

A recommendation in the *UPEI Review* is for the University to engage in an annual audit process to assess the implementation of the Action Plan over the next five years. This recommendation was developed based on the need to rebuild trust in the Board of Governors and University.

UPEI commits to publicly sharing the annual audit reports.

The University will prepare a comprehensive implementation plan for each year of the Action Plan that includes the specific activities that will be undertaken in that year, stated in an auditable manner, meaning that all activities will be measurable and observable. The annual implementation plans for each of years 0–5 of the Action Plan will be added to the Action Plan website as they are developed. Annual progress reports on the implementation plans will be generated. Audits will be conducted by the applicable practitioner to the appropriate national audit standard.

UPEI fiscal year	Action Plan year	Audit Year	Subject of Audit
2023–2024	Year 0		
2024–2025	Year 1		
2025–2026	Year 2	Year 1	Year 0 implementation plan Year 1 implementation plan
2026–2027	Year 3	Year 2	Year 2 implementation plan
2027–2028	Year 4	Year 3	Year 3 implementation plan
2028–2029	Year 5	Year 4	Year 4 implementation plan
2029–2030		Year 5	Year 5 implementation plan

## 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

ADDRESSING ISSUES and RESPONSIBILITY	TIMELINE	SUPPORTING ACTIONS	UPEI REVIEW RECOMMENDATIONS and CAMPUS ISSUES ADDRESSED
<b>1.1.1 Publicly share the UPEI Review</b> President Chair, Board of Governors	Year 0	<ul style="list-style-type: none"> <li>A copy of the <i>UPEI Review</i> 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.</li> <li>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.</li> </ul>	<i>Accountability and acknowledgement</i>  <i>Make the report public</i>
<b>1.1.2 Apologize for harms caused</b> President Chair, Board of Governors	Year 0	<ul style="list-style-type: none"> <li>An apology was made to UPEI campus members through campus communications, media interviews, and in-person by the interim President and the Board Chair.</li> <li>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.</li> </ul>	<i>Accountability and acknowledgement</i>  <i>Publicly acknowledge there is a serious problem and undertake to fix it</i>
<b>1.1.3 Provide additional supports to the campus community</b> President	Year 0	<ul style="list-style-type: none"> <li>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.</li> <li>More information on how to make disclosures and reports of harassment or discrimination regarding senior leaders was shared with campus members.</li> <li>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.</li> </ul>	<i>Accountability and acknowledgement</i>  <i>Publicly acknowledge there is a serious problem and undertake to fix it</i>  <i>Additional supports</i>  <i>Improve information sharing and communications processes</i>

ADDRESSING ISSUES and RESPONSIBILITY	TIMELINE	SUPPORTING ACTIONS	UPEI REVIEW RECOMMENDATIONS and CAMPUS ISSUES ADDRESSED
<b>1.1.4 Consult campus on addressing harms</b> Chair, Board of Governors Board of Governors President	Year 0	<ul style="list-style-type: none"> <li>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.</li> <li>The interim President held townhalls and a series of campus listening sessions.</li> <li>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.</li> <li>UPEI leadership maintains communication with other groups and organizations including the UPEI Student Union, the UPEI Alumni Association, and the provincial government.</li> </ul>	<i>Accountability and acknowledgement</i>  <i>Publicly acknowledge there is a serious problem and undertake to fix it</i>  <i>Create a culture of listening</i>
<b>1.1.5 Reinforce oversight and monitoring mechanisms for improved accountability of leaders</b> President Chair, Board of Governors	Year 0–1	<ul style="list-style-type: none"> <li>Obtain an external review of Board governance, including a review of processes for recruitment of new Board members.</li> </ul>	<i>Publicly acknowledge there is a serious problem and undertake to fix it</i>  <i>Create a culture of listening</i>
	Year 1	<ul style="list-style-type: none"> <li>Conduct a review of senior leadership structure including ensuring duties and responsibilities are matched to levels of authority and clear accountability is assigned</li> <li>Develop a 360-degree performance review process for President and Senior Executive Team</li> </ul>	<i>Acknowledge leadership issues</i>  <i>Refresh membership of Board of Governors and enhance oversight on key issues</i>

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

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

ADDRESSING ISSUES and RESPONSIBILITY	TIMELINE	SUPPORTING ACTIONS	UPEI REVIEW RECOMMENDATIONS and CAMPUS ISSUES ADDRESSED
<b>1.2.1 Publicly state UPEI's commitment to change and accountability</b> President Chair, Board of Governors	Year 0	<ul style="list-style-type: none"> <li>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.</li> <li>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 <i>UPEI Review</i> recommendations within the Action Plan.</li> </ul>	<i>Accountability and acknowledgement</i>  <i>Publicly acknowledge there is a serious problem and undertake to fix it</i>  <i>Create a culture of listening</i>  <i>Improve accountability and transparency</i>
<b>1.2.2 Develop an Advisory Group for input on plan development</b> President	Year 0	<ul style="list-style-type: none"> <li>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.</li> <li>The University used an external facilitator to consult with the Advisory Group to gather feedback and provide guidance to help inform actions.</li> <li>Throughout the process, information on the progress of the Advisory Group was shared with campus.</li> </ul>	<i>Accountability and acknowledgement</i>  <i>Publicly acknowledge there is a serious problem and undertake to fix it</i>  <i>Create a culture of listening</i>  <i>Improve transparency</i>
<b>1.2.3 Engage in ongoing consultation</b> President Senior Executive Team	Year 0–5	<ul style="list-style-type: none"> <li>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.</li> </ul>	<i>Accountability and acknowledgement</i>  <i>Publicly acknowledge there is a serious problem and undertake to fix it</i>  <i>Create a culture of listening</i>
	Year 2–3	<ul style="list-style-type: none"> <li>Develop and deliver a mid-plan consultation to gauge campus and community members' input on progress.</li> </ul>	



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

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

ADDRESSING ISSUES and RESPONSIBILITY	TIMELINE	SUPPORTING ACTIONS	UPEI REVIEW RECOMMENDATIONS and CAMPUS ISSUES ADDRESSED
<b>1.3.1 Use community feedback to inform actions</b> President Chair, Board of Governors Senior Executive Team	Year 0	<ul style="list-style-type: none"> <li>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</li> <li>Share draft Action Plan publicly for feedback and finalize after consideration of community feedback as well as feedback from the UPEI Senate and Board</li> </ul>	<i>Accountability and acknowledgement</i>  <i>Improve transparency</i>  <i>Create a culture of listening</i>
<b>1.3.2 Draft Action Plan and share with community</b> President Chair, Board of Governors Senior Executive Team	Year 0	<ul style="list-style-type: none"> <li>Post the draft Action Plan on the UPEI website in early January 2024</li> <li>Finalize the Action Plan after consideration of the community feedback as well as feedback from the UPEI Senate and Board</li> </ul>	<i>Accountability and acknowledgement</i>  <i>Create a culture of listening</i>  <i>Improve accountability and transparency</i>
<b>1.3.3 Identify resources needed for implementation</b> President Senior Executive Team	Year 0	<ul style="list-style-type: none"> <li>Identify initial human resources and budget needs related to the Action Plan and seek funding support</li> </ul>	<i>Build HR and resource capacity</i>  <i>Additional resources</i>  <i>Improve accountability</i>
<b>1.3.4 Create a Board of Governors Campus Culture Oversight Committee</b> Board of Governors	Year 0	<ul style="list-style-type: none"> <li>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.</li> </ul>	<i>Enhance oversight on key issues identified in the UPEI Review</i>  <i>Improve accountability</i>

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

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

ADDRESSING ISSUES and RESPONSIBILITY	TIMELINE	SUPPORTING ACTIONS	UPEI REVIEW RECOMMENDATIONS and CAMPUS ISSUES ADDRESSED
<b>1.4.1 Select auditor</b> Board of Governors	Year 1	<ul style="list-style-type: none"> <li>Select auditor with EDI competency based on recommendation of the Finance and Audit Committee and in consultation with Government of PEI</li> <li>Consider an audit organization that has access to a resource base outside PEI as well as experience within post-secondary education</li> </ul>	<i>Accountability and acknowledgement</i>  <i>Make the report public</i>  <i>Annual audits to measure progress</i>
<b>1.4.2 Develop audit schedule and process</b> President Senior Executive Team	Year 1–5	<ul style="list-style-type: none"> <li>Develop audit schedule and process to support annual audits</li> <li>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</li> <li>Align internal resource needs to support the audit</li> </ul>	<i>Accountability and acknowledgement</i>  <i>Publicly acknowledge there is a serious problem and undertake to fix it</i>  <i>Annual audits to measure progress</i>  <i>Improve accountability and transparency</i>
<b>1.4.3 Assign annual audits and receive results</b> President Board of Governors	Year 2–5	<ul style="list-style-type: none"> <li>Carry out annual audits (aligned with UPEI fiscal year) based on audit schedule</li> <li>Make the audit results public</li> <li>Conduct the first audit following the completion of Year 1 and thereafter annually</li> </ul>	<i>Accountability and acknowledgement</i>  <i>Annual audits to measure progress</i>  <i>Improve accountability and transparency</i>

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

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

ADDRESSING ISSUES and RESPONSIBILITY	TIMELINE	SUPPORTING ACTIONS	UPEI REVIEW RECOMMENDATIONS and CAMPUS ISSUES ADDRESSED
<b>2.1.1 Develop and share full job description for President and Vice-Chancellor position</b> Presidential Search Committee	Year 0	<ul style="list-style-type: none"> <li>• Build the need to champion work on culture improvements (as outlined in the <i>UPEI Review</i>) within the job description for the next President</li> <li>• Build the following components into the selection criteria for the next President: <ul style="list-style-type: none"> <li>• commitment to equity, diversity, and inclusion</li> <li>• deep understanding of workplace fairness and harassment</li> <li>• track record of success in implementation of projects to advance EDI in meaningful ways</li> <li>• commitment to reconciliation and Indigenization</li> <li>• organizational change experience and desire to champion change</li> <li>• ethics, transparency, and integrity</li> </ul> </li> <li>• Post a detailed job description on the UPEI website for full transparency</li> </ul>	<i>Selection of next President and review of their performance</i>  <i>Improve accountability and transparency</i>
<b>2.1.2 Presidential search communications</b> Chair, Presidential Search Committee	Year 0–1	<ul style="list-style-type: none"> <li>• Communicate information and updates regularly about the selection process to the campus community</li> </ul>	<i>Selection of next President and review of their performance</i>  <i>Improve accountability and transparency</i>
<b>2.1.3 Candidate presentations</b> Chair, Presidential Search Committee	Year 0	<ul style="list-style-type: none"> <li>• Provide the campus community with feedback opportunities, which will include campus presentations by shortlisted candidates</li> <li>• Provide campus members the opportunity to give anonymous feedback on shortlisted candidates</li> </ul>	<i>Selection of next President and review of their performance</i>  <i>Improve accountability and transparency</i>



ADDRESSING ISSUES and RESPONSIBILITY	TIMELINE	SUPPORTING ACTIONS	UPEI REVIEW RECOMMENDATIONS and CAMPUS ISSUES ADDRESSED
<b>2.1.4 Candidate response to UPEI Review</b> Presidential Search Committee	Year 0	<ul style="list-style-type: none"> <li>Require shortlisted candidates to provide a response to the <i>UPEI Review</i> recommendations</li> <li>Require shortlisted candidates to provide a response with respect to the draft Action Plan</li> </ul>	<i>Selection of next President and review of their performance</i>  <i>Improve accountability and transparency</i>
<b>2.1.5 Vetting candidates</b> Presidential Search Committee	Year 0	<ul style="list-style-type: none"> <li>Ensure that the next President has been adequately vetted</li> </ul>	<i>Selection of next President and review of their performance</i>  <i>Improve accountability and transparency</i>

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

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

ADDRESSING ISSUES and RESPONSIBILITY	TIMELINE	SUPPORTING ACTIONS	UPEI REVIEW RECOMMENDATIONS and CAMPUS ISSUES ADDRESSED
<b>2.2.1 Fill Board of Governors' vacancies</b> Board of Governors	Year 0	<ul style="list-style-type: none"> <li>Adopt good governance practices to ensure board policies, practices, and recruitment create conditions aimed at increasing Board diversity</li> <li>Inform Board-member-appointing bodies of skill, demographic, and experience gaps</li> </ul>	<p><i>Strengthen leadership</i></p> <p><i>Refresh membership of the Board of Governors and enhance oversight on key issues within the UPEI Review</i></p>
<b>2.2.2 Develop skills matrix for competencies and representation</b> Board of Governors President	Year 0	<ul style="list-style-type: none"> <li>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</li> <li>Make the Board recruitment process for UPEI Board appointments more transparent by making it public, and publicizing the opportunity</li> </ul>	<p><i>Strengthen leadership</i></p> <p><i>Refresh membership of the Board of Governors and enhance oversight on key issues within the UPEI Review</i></p> <p><i>Increase Board diversity</i></p> <p><i>Improve accountability and transparency</i></p>
<b>2.2.3 Review Board Governance</b> Board of Governors	Year 0–1	<ul style="list-style-type: none"> <li>Obtain an external review on Board governance</li> <li>Make changes in board procedures resulting from the review recommendations public</li> </ul>	<p><i>Strengthen leadership</i></p> <p><i>Refresh membership of the Board of Governors and enhance oversight on key issues within the UPEI Review</i></p> <p><i>Improve accountability and transparency</i></p> <p><i>Improve governance leadership</i></p>

ADDRESSING ISSUES and RESPONSIBILITY	TIMELINE	SUPPORTING ACTIONS	UPEI REVIEW RECOMMENDATIONS and CAMPUS ISSUES ADDRESSED
<b>2.2.4 Increase Board oversight</b> Board of Governors President	Year 0–2	<ul style="list-style-type: none"> <li>Review Terms of Reference of Board Standing Committees to ensure that Board oversight responsibilities are adequately met</li> <li>Create a Campus Culture Oversight Committee of the Board to oversee implementation of the UPEI Action Plan and EDI Strategy progress monitoring</li> <li>Enhance Board training</li> </ul>	<i>Strengthen leadership</i>  <i>Refresh membership of the Board of Governors and enhance oversight on key issues within the UPEI Review</i>  <i>Review climate and management practices</i>  <i>Improve accountability and transparency</i>  <i>Leadership training</i>
<b>2.2.5 New reporting mechanisms to inform the Board</b> Board of Governors President VP People and Culture	Year 1–2	<ul style="list-style-type: none"> <li>Report to the Human Resources Committee of the Board on terminations and resignations, and on whether any such terminations or resignations have associated NDAs</li> <li>Develop process to inform the Campus Culture Oversight Committee if areas within UPEI demonstrate concerning trends of harassment or discrimination</li> </ul>	<i>Strengthen leadership</i>  <i>Refresh membership of the Board of Governors and enhance oversight on key issues within the UPEI Review</i>  <i>Review climate and management practices</i>  <i>Improve accountability and transparency</i>
<b>2.2.6 Develop a Board policy for appointing acting and interim administrators</b> Chair, Board of Governors President	Year 1	<ul style="list-style-type: none"> <li>Develop and implement a policy on the appointment of acting and interim administrators for the roles of president and senior administrators</li> <li>Make the policy accessible to the campus community</li> </ul>	<i>Strengthen leadership</i>  <i>Refresh membership of the Board of Governors and enhance oversight on key issues within the UPEI Review</i>  <i>Review climate and management practices</i>  <i>Improve accountability and transparency</i>



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

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

ADDRESSING ISSUES and RESPONSIBILITY	TIMELINE	SUPPORTING ACTIONS	UPEI REVIEW RECOMMENDATIONS and CAMPUS ISSUES ADDRESSED
<b>2.3.1 Develop orientation and training materials</b> Board of Governors Senate	Year 1–2	<ul style="list-style-type: none"> <li>• Provide training on governance and other relevant expertise to the Board and Senate</li> <li>• Provide EDI training to the Board and Senate</li> </ul>	<i>Strengthen leadership</i>  <i>Leadership training</i>  <i>Improve Board and Senate governance</i>  <i>Improve climate and culture</i>
<b>2.3.2 Develop training schedule and tracking process</b> Board of Governors Senate	Year 1–2	<ul style="list-style-type: none"> <li>• Identify institutional resources to support the development of training programs and related materials</li> <li>• Develop a training plan for Board of Governors and Senate</li> <li>• Develop a process to track training participation of those in governance-related roles</li> </ul>	<i>Strengthen leadership</i>  <i>Leadership training</i>  <i>Improve accountability and transparency</i>

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

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

ADDRESSING ISSUES and RESPONSIBILITY	TIMELINE	SUPPORTING ACTIONS	UPEI REVIEW RECOMMENDATIONS and CAMPUS ISSUES ADDRESSED
<b>2.4.1 Develop training program for UPEI leaders</b> President VP People and Culture	Year 1–2	<ul style="list-style-type: none"> <li>Assess training needs of campus leadership and leverage internal resources, including UPEI's professional development team, to help address these needs</li> <li>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</li> </ul>	<i>Strengthen leadership</i>  <i>Leadership training</i>  <i>Improve accountability</i>  <i>Improve policies and processes</i>
	Year 2	<ul style="list-style-type: none"> <li>Develop a leadership training strategy</li> </ul>	<i>Improve climate and culture</i>
	Year 3	<ul style="list-style-type: none"> <li>Create a Leadership Training Office to implement the leadership training strategy</li> </ul>	<i>Improve trust and safety on campus</i>
	Year 4–5	<ul style="list-style-type: none"> <li>The Leadership Training Office to administer the leadership training program</li> </ul>	<i>Increase staff capacity</i>  <i>Additional resources</i>
<b>2.4.2 Develop training schedule and tracking process</b> VP People and Culture	Year 3	<ul style="list-style-type: none"> <li>Develop a training calendar</li> <li>Develop a process to track participation in leadership training</li> </ul>	<i>Strengthen leadership</i>  <i>Leadership training</i>  <i>Improve accountability and transparency</i>  <i>Improve policies and processes</i>  <i>Improve climate and culture</i>  <i>Improve trust and safety on campus</i>

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

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

ADDRESSING ISSUES and RESPONSIBILITY	TIMELINE	SUPPORTING ACTIONS	UPEI REVIEW RECOMMENDATIONS and CAMPUS ISSUES ADDRESSED
<b>2.5.1 Develop training program for UPEI academic administrators</b> President VP Academic and Research	Year 1–2	<ul style="list-style-type: none"> <li>• 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</li> <li>• 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</li> <li>• 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</li> </ul>	<i>Strengthen leadership</i>  <i>Leadership training</i>  <i>Improve accountability and transparency</i>  <i>Improve policies and processes</i>  <i>Improve climate and culture</i>
<b>2.5.2 Develop training schedule and tracking process</b> VP Academic and Research	Year 1–2	<ul style="list-style-type: none"> <li>• Develop institutional resources to support the offering of a leadership development program on a regular schedule, including ongoing seminars for continual improvement</li> <li>• Build, through the ongoing process of tracking, a community of colleagues with shared interests and common goals in effective leadership</li> </ul>	<i>Strengthen leadership</i>  <i>Leadership training</i>  <i>Improve accountability and transparency</i>



## GOAL 3 IMPROVE UPEI'S CAMPUS CULTURE

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

ADDRESSING ISSUES and RESPONSIBILITY	TIMELINE	SUPPORTING ACTIONS	UPEI REVIEW RECOMMENDATIONS and CAMPUS ISSUES ADDRESSED
<b>3.1.1 Culture of listening for students</b> President VP Academic and Research VP Administration and Finance	Year 1–3	<ul style="list-style-type: none"> <li>• Ensure Student Union Executive and Graduate Student Association Executive are introduced to Deans Council and Directors of administrative units to ensure they are equipped to navigate UPEI's structures</li> <li>• Increase the institutional capacity for student focused data collection and analysis of resulting data to provide insight on student experiences, inform initiatives that address student issues, and help assess outcomes</li> <li>• 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</li> <li>• 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</li> </ul>	<i>Create a culture of listening</i>  <i>Improve accountability and transparency</i>  <i>Improve information sharing and communications processes</i>  <i>Improve climate and culture</i>  <i>Improve trust and safety on campus</i>
<b>3.1.2 Culture of listening for employees</b> President VP People and Culture	Year 1	<ul style="list-style-type: none"> <li>• Provide training on trauma-informed approaches to individuals who handle disclosures</li> <li>• Provide active listening training</li> </ul>	<i>Create a culture of listening</i>  <i>Improve accountability and transparency</i>
	Year 2	<ul style="list-style-type: none"> <li>• Establish accessible channels to provide confidential feedback safety, sexual violence, and harassment and discrimination</li> <li>• Regularly seek employee feedback through surveys</li> </ul>	<i>Increase education and awareness</i>  <i>Improve information sharing and communications processes</i>  <i>Improve climate and culture</i>  <i>Improve trust and safety on campus</i>

ADDRESSING ISSUES and RESPONSIBILITY	TIMELINE	SUPPORTING ACTIONS	UPEI REVIEW RECOMMENDATIONS and CAMPUS ISSUES ADDRESSED
<b>3.1.3 Foster a culture of listening for the UPEI community</b> Chair, Board of Governors President	Year 0–5	<ul style="list-style-type: none"> <li>Coordinate with campus partners to foster a campus culture built on a commitment to listening and idea sharing</li> <li>Listen to individuals who have suffered harm at the University to learn from their experiences as a way of fostering reconciliation</li> <li>Continue to work with the Indigenous community at UPEI to further our journey of reconciliation</li> </ul>	<i>Create a culture of listening</i> <i>Improve accountability and transparency</i> <i>Increase education and awareness</i> <i>Improve information sharing and communications processes</i> <i>Improve climate and culture</i> <i>Improve trust and safety on campus</i>
<b>3.1.4 Performance reviews and campus feedback</b> Board of Governors President Senior Executive Team	Year 1	<ul style="list-style-type: none"> <li>Develop a process for 360-degree performance review of President</li> <li>Develop a process for 360-degree performance review of the Senior Executive Team</li> </ul>	<i>Strengthen leadership</i> <i>Improve accountability and transparency</i> <i>Improve information sharing and communications processes</i>
	Year 2–5	<ul style="list-style-type: none"> <li>President to implement 360-degree performance reviews of Senior Executive Team</li> <li>Senior Executive Team to ensure performance reviews of Deans, Directors, and Managers are carried out</li> <li>Following their first year of service, implement annual 360-degree performance review of President</li> </ul>	
<b>3.1.5 Improve feedback processes</b> VP People and Culture	Year 1	<ul style="list-style-type: none"> <li>Secure the resources to support employee engagement activities</li> <li>Plan and develop employee engagement survey</li> </ul>	<i>Strengthen leadership</i> <i>Create a culture of listening</i> <i>Additional resources</i> <i>Build employee engagement</i> <i>Improve accountability and transparency</i> <i>Improve communications processes</i> <i>Improve climate and culture</i> <i>Improve trust and safety on campus</i>
	Year 2	<ul style="list-style-type: none"> <li>Conduct employee engagement survey</li> <li>Establish accessible channels to provide confidential feedback on safety, sexual violence, and harassment and discrimination</li> </ul>	
	Year 3–5	<ul style="list-style-type: none"> <li>Conduct annual employee engagement survey</li> </ul>	

ADDRESSING ISSUES and RESPONSIBILITY	TIMELINE	SUPPORTING ACTIONS	UPEI REVIEW RECOMMENDATIONS and CAMPUS ISSUES ADDRESSED
<b>3.1.6 Exit interviews</b> VP People and Culture	Year 1	<ul style="list-style-type: none"> <li>Develop a process to offer exit interviews for departing employees</li> <li>Develop a process to share aggregate information learned from exit interviews in confidential and appropriate ways</li> <li>Create a position in Human Resources to support exit interview activities</li> </ul>	<i>Review climate and management practices</i>  <i>Improve accountability and transparency</i>  <i>Continual improvement</i>
	Year 2	<ul style="list-style-type: none"> <li>Implement exit interview process and reporting</li> </ul>	<i>Improve climate and culture</i>
	Year 3–5	<ul style="list-style-type: none"> <li>Develop protocol for how exit interview information will be appropriately shared with the EDI and Human Rights department where permitted and relevant</li> <li>Continue and optimize exit interview process</li> </ul>	

### GOAL 3 IMPROVE UPEI'S CAMPUS CULTURE

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

ADDRESSING ISSUES and RESPONSIBILITY	TIMELINE	SUPPORTING ACTIONS	UPEI REVIEW RECOMMENDATIONS and CAMPUS ISSUES ADDRESSED
<b>3.2.1 Employee engagement</b> VP People and Culture Senior Executive Team	Year 0	<ul style="list-style-type: none"> <li>Create and fill a Director of Human Resources position</li> </ul>	<i>Create a culture of listening</i>
	Year 1	<ul style="list-style-type: none"> <li>Increase staff capacity in the Human Resources department to support employee engagement</li> <li>Plan and develop employee engagement survey</li> <li>Plan and develop initiatives to enhance employee engagement</li> <li>Encourage all managers to recognize contributions made by employees to the University</li> </ul>	<i>Additional resources</i>  <i>Employee engagement</i>  <i>Improve climate and culture</i>
	Year 2	<ul style="list-style-type: none"> <li>Implement employee engagement survey</li> <li>Commence employee engagement initiatives</li> </ul>	<i>Improve communications processes</i>
	Year 3–5	<ul style="list-style-type: none"> <li>Continue and optimize employee engagement and recognition processes</li> <li>Use data from employee engagement surveys to inform improvements</li> </ul>	<i>Data informed decision making</i>

ADDRESSING ISSUES and RESPONSIBILITY	TIMELINE	SUPPORTING ACTIONS	UPEI REVIEW RECOMMENDATIONS and CAMPUS ISSUES ADDRESSED
<b>3.2.2 Development opportunities for employees</b> VP People and Culture VP Academic and Research	Year 1–5	<ul style="list-style-type: none"> <li>• Provide staff with enhanced opportunities for training and skills building</li> <li>• Enhance faculty development opportunities in teaching and research through the Teaching Learning Centre and Office of Research Services</li> </ul>	<i>Create a culture of listening</i>  <i>Employee engagement</i>  <i>Improve climate and culture</i>  <i>Improve communications processes</i>
<b>3.2.3 Review staff classification system</b> VP People and Culture	Year 2	<ul style="list-style-type: none"> <li>• Examine the staff classification system with the objective of ensuring that all positions are consistently evaluated and properly classified</li> </ul>	<i>Create a culture of listening</i>  <i>Employee engagement</i>  <i>Improve climate and culture</i>
<b>3.2.4 Enhance open dialogue</b> President Senior Executive Team	Year 0–5	<ul style="list-style-type: none"> <li>• Continue opportunities for campus members to speak about their experiences, provide input, and share ideas, including with the President and Senior Executive Team</li> </ul>	<i>Create a culture of listening</i>  <i>Employee engagement</i>  <i>Improve information sharing and communications processes</i>  <i>Improve climate and culture</i>
<b>3.2.5 Communicate supports and resources</b> VP People and Culture	Year 1–5	<ul style="list-style-type: none"> <li>• Promote information about supports for campus members in relation to health and wellbeing</li> <li>• As they are implemented, share information on new supports and services in EDI and SVPRO that are accessible to campus members</li> </ul>	<i>Create a culture of listening</i>  <i>Improve information sharing and communications processes</i>



## GOAL 3 IMPROVE UPEI'S CAMPUS CULTURE

### Action 3 Rebuild trust and safety on campus

ADDRESSING ISSUES and RESPONSIBILITY	TIMELINE	SUPPORTING ACTIONS	UPEI REVIEW RECOMMENDATIONS and CAMPUS ISSUES ADDRESSED
<b>3.3.1 Improvements to Security Services</b> VP Administration and Finance	Year 0	<ul style="list-style-type: none"> <li>Reinstate the position of Manager of Security Services, and fill position, to provide a dedicated management resource</li> </ul>	<i>Create a culture of listening</i>  <i>Improve accountability and transparency</i>
	Year 0–2	<ul style="list-style-type: none"> <li>Hire additional security attendants</li> </ul>	<i>Improve information sharing and communications processes</i>
	Year 1	<ul style="list-style-type: none"> <li>Create and implement an annual staff training plan for Security Services which includes sexual violence and EDI training</li> </ul>	<i>Improve climate and culture</i>
<b>3.3.2 Review campus safety infrastructure</b> VP Administration and Finance	Year 0–1	<ul style="list-style-type: none"> <li>UPEI Health, Safety, and Environment to provide and promote information to campus members about reporting under occupational health and safety legislation</li> </ul>	<i>Improve campus safety</i>  <i>Improve inclusion</i>
	Year 1–2	<ul style="list-style-type: none"> <li>Promote the methods that university community members can report safety concerns</li> </ul>	<i>Create a culture of listening</i>  <i>Improve information sharing</i>
	Year 2–3	<ul style="list-style-type: none"> <li>Review campus safety infrastructure (e.g., lighting, safety poles, and security cameras)</li> <li>Review the Campus Accessibility Audit to determine and plan for needs</li> <li>Enhance campus safety supports such as UPEI SAFE app</li> </ul>	
<b>3.3.3 Provide sexual violence and EDI training for Security Services</b> VP People and Culture VP Administration and Finance	Year 2	<ul style="list-style-type: none"> <li>Provide sexual violence and EDI training to Security Services staff on an annual basis</li> <li>SVPRO to provide training on trauma-informed approaches to receiving disclosures to Security Services staff</li> </ul>	<i>Improve campus safety</i>  <i>Build trust</i>  <i>Training</i>  <i>Education and awareness</i>  <i>Improve campus safety</i>  <i>Improve climate and culture</i>

ADDRESSING ISSUES and RESPONSIBILITY	TIMELINE	SUPPORTING ACTIONS	UPEI REVIEW RECOMMENDATIONS and CAMPUS ISSUES ADDRESSED
<b>3.3.4 Create tracking processes for reporting of sexual violence and harassment and discrimination</b> VP People and Culture	Year 1	<ul style="list-style-type: none"> <li>Track reporting information (including anonymous and third party) through the Sexual Violence Policy</li> </ul>	<i>Improve campus safety</i>
	Year 3	<ul style="list-style-type: none"> <li>Track reporting information (including anonymous and third party) through the Harassment and Discrimination Policy</li> </ul>	<i>Build trust</i>  <i>Data and reporting</i>

### GOAL 3 IMPROVE UPEI'S CAMPUS CULTURE

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

ADDRESSING ISSUES and RESPONSIBILITY	TIMELINE	SUPPORTING ACTIONS	UPEI REVIEW RECOMMENDATIONS and CAMPUS ISSUES ADDRESSED
<b>3.4.1 Communicate behavioural obligations</b> President Senior Executive Team	Year 1–5	<ul style="list-style-type: none"> <li>Communicate behavioural obligations and limitations through documents, including the Sexual Violence Policy, Harassment and Discrimination Policy, Student Code of Conduct, Residence Life Handbook, Student-Athlete Code of Conduct, Athletic Club Guidelines, and International Student Orientation Handbook</li> </ul>	<i>Improve practices related to harassment and discrimination</i>  <i>Improve practices related to addressing sexual violence</i>  <i>Public awareness campaign</i>  <i>Education and awareness</i>  <i>Improve campus safety</i> <i>Improve climate and culture</i>  <i>Improve information sharing and communications processes</i>

ADDRESSING ISSUES and RESPONSIBILITY	TIMELINE	SUPPORTING ACTIONS	UPEI REVIEW RECOMMENDATIONS and CAMPUS ISSUES ADDRESSED
<b>3.4.2 Develop on-campus awareness</b> President Senior Executive Team	Year 2–4	<ul style="list-style-type: none"> <li>Put in place the resources needed to support and develop training opportunities related to building inclusive environments; consider topics such as anti-racism, anti-oppression, unconscious bias, microaggressions, cultural differences, sexual violence including gender-based violence, and harassment and discrimination</li> <li>Ensure training has an equity, diversity, and inclusion lens</li> <li>Use a trauma-informed approach to the delivery of training on difficult subjects</li> <li>Consult subject-matter experts for specific and targeted themes and messages</li> <li>Ensure there is capacity to respond to increased need for supports and reporting because of awareness program efforts</li> <li>Provide in-person and on-demand training related to building inclusive environments</li> <li>Provide mechanisms through which campus community members can request training on specific issues</li> </ul>	<i>Improve practices related to harassment and discrimination</i>  <i>Improve practices related to addressing sexual violence</i>  <i>Public awareness campaign</i>  <i>Education and awareness</i>  <i>Improve campus safety</i>  <i>Improve climate and culture</i>  <i>Improve information sharing and communications processes</i>
<b>3.4.3 Update available training</b> President	Year 3–5	<ul style="list-style-type: none"> <li>Make EDI training available that reflects how the environment continues to evolve</li> <li>Commit to ongoing improvements to EDI training opportunities</li> </ul>	<i>Public awareness campaign</i>  <i>Accountability and transparency</i>  <i>Continual improvement</i>

### GOAL 3 IMPROVE UPEI'S CAMPUS CULTURE

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

ADDRESSING ISSUES and RESPONSIBILITY	TIMELINE	SUPPORTING ACTIONS	UPEI REVIEW RECOMMENDATIONS and CAMPUS ISSUES ADDRESSED
<b>3.5.1 Enhance transparency and information sharing</b> Board of Governors President	Year 1–2	<ul style="list-style-type: none"> <li>Assess adequacy of access to information on academic, financial, and governance decision making by Board and Senate and improve transparency and access where needed</li> <li>Ensure Board of Governors and Senate minutes are posted online after approval</li> </ul>	<i>Improve transparency</i>  <i>Improve information sharing and communications processes</i>
	Year 2	<ul style="list-style-type: none"> <li>Review and update in-camera guidelines, to ensure completeness of process</li> </ul>	
<b>3.5.2 Provide information on Board and Senate meetings</b> Chair, Board of Governors President	Year 0	<ul style="list-style-type: none"> <li>Provide communication proactively to the UPEI community regarding Board of Governors and Senate meeting dates, and times, and include methods to attend</li> </ul>	<i>Improve transparency</i>  <i>Improve information sharing and communications processes</i>
<b>3.5.3 Improve information sharing</b> President Senior Executive Team	Year 2–5	<ul style="list-style-type: none"> <li>Encourage all departments to make more information accessible about common processes</li> </ul>	<i>Improve information sharing and communications processes</i>  <i>Education and awareness</i>
<b>3.5.4 Build opportunities for input and participation</b> President Senior Executive Team	Year 1–5	<ul style="list-style-type: none"> <li>Enhance information sharing about campus initiatives</li> <li>Provide information to campus on opportunities to take part in planning and idea sharing</li> </ul>	<i>Create a culture of listening</i>  <i>Improve information sharing and communications processes</i>  <i>Employee engagement</i>



<b>3.5.5 Improve campus communications</b> President	Year 1	<ul style="list-style-type: none"> <li>Review structure and objectives of Marketing and Communications department</li> <li>Assess adequacy of staffing capacity in Marketing and Communications</li> </ul>	<i>Improve information sharing and communications processes</i>
	Year 2	<ul style="list-style-type: none"> <li>Develop a campus communications strategy with focus on better understanding the communications needs of campus audiences, effective communications processes, and collaboration opportunities</li> </ul>	<i>Improve climate and culture</i>
	Year 3–5	<ul style="list-style-type: none"> <li>Implement the campus communications strategy</li> </ul>	

## **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**

<b>ADDRESSING ISSUES and RESPONSIBILITY</b>	<b>TIMELINE</b>	<b>SUPPORTING ACTIONS</b>	<b>UPEI REVIEW RECOMMENDATIONS and CAMPUS ISSUES ADDRESSED</b>
<b>4.1.1 Create new EDI and Human Rights department</b> President VP People and Culture	Year 0–1	<ul style="list-style-type: none"> <li>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</li> <li>Establish the purpose of the EDI and Human Rights department with the organization chart delineating the roles within the office</li> <li>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</li> <li>Department will report directly to VP People and Culture</li> </ul>	<i>Improve practices related to harassment and discrimination</i>  <i>Improve practices related to addressing sexual violence</i>  <i>Create an on-campus equity, diversity, an inclusion office</i>  <i>Improve trust and safety on campus</i>
	Year 2	<ul style="list-style-type: none"> <li>Develop a protocol, as an alternative pathway, for the Director of EDI and Human Rights Department to report issues directly to the President, and/or to the Chair of the Board of Governors, including conflicts of interests and other serious issues</li> </ul>	

ADDRESSING ISSUES and RESPONSIBILITY	TIMELINE	SUPPORTING ACTIONS	UPEI REVIEW RECOMMENDATIONS and CAMPUS ISSUES ADDRESSED
<b>4.1.2 Increase staff capacity in EDI, human rights, and sexual violence prevention</b> President VP People and Culture	Year 0–1	<ul style="list-style-type: none"> <li>• Move the EDI and SVPRO offices to a more visible location</li> <li>• Hire additional staff to support the new EDI and Human Rights Department</li> <li>• Create a new leadership position, Director of EDI and Human Rights to provide oversight and leadership to the Department</li> <li>• Create a new administrative assistant position to support the Department</li> <li>• Create a new position for sexual violence prevention and response coordination to supplement response capacity and improve prevention and response activities</li> </ul>	<i>Improve practices related to addressing harassment and discrimination</i>  <i>Improve practices related to addressing sexual violence</i>  <i>Additional resources</i>  <i>Coordinated response team approach</i>
	Year 2	<ul style="list-style-type: none"> <li>• Move the SVPRO to an area easily accessible while providing confidentiality</li> <li>• Work with campus partners to cultivate a focus on prevention and awareness</li> <li>• Create additional staff capacity on sexual and gender diversity to lead special projects to make the campus a more welcoming environment for members of the 2SLGBTQIA+ community</li> <li>• Create additional staff capacity on anti-racism and cultural diversity to lead special projects to make the campus a more welcoming environment for racialized members of the campus community</li> </ul>	<i>Physical location of the SVPRO</i>  <i>Increased support for parties</i>  <i>Education and awareness</i>  <i>Improve trust and safety on campus</i>
<b>4.1.3 Administer Harassment and Discrimination Policy</b> VP People and Culture	Year 1–2	<ul style="list-style-type: none"> <li>• The EDI and Human Rights Department will be responsible for intake and administration of the new Harassment and Discrimination Policy (once developed)</li> <li>• Create a new position, Human Rights and Equity Advisor, for the intake and administration of the new Harassment and Discrimination Policy</li> <li>• Communicate to the campus community that the EDI and Human Rights Department is the intake location for harassment, discrimination, and sexual violence reports and complaints</li> <li>• Use a variety of external investigators</li> <li>• Ensure investigations are procedurally fair</li> <li>• Provide informal resolution services in accordance with the new Harassment and Discrimination Policy</li> </ul>	<i>Improve practices related to addressing harassment and discrimination</i>  <i>Create a new Harassment and Discrimination Policy</i>  <i>Create an on-campus equity, diversity, and inclusion office</i>  <i>Education and awareness</i>  <i>Use a variety of external investigators</i>  <i>Informal resolutions</i>

ADDRESSING ISSUES and RESPONSIBILITY	TIMELINE	SUPPORTING ACTIONS	UPEI REVIEW RECOMMENDATIONS and CAMPUS ISSUES ADDRESSED
<b>4.1.4 Develop and deliver training</b> President Senior Executive Team	Year 0–1	<ul style="list-style-type: none"> <li>Review initiatives at other post-secondary educational institutions</li> <li>Collaborate with areas of campus with their own EDI efforts</li> <li>Invest in partnership with a comprehensive EDI training partner (i.e., Canadian Centre for Diversity and Inclusion)</li> <li>Create a new position responsible for equity, diversity, and inclusion training and education</li> <li>Create a new position responsible for sexual violence prevention and education</li> <li>Make the online Preventing Sexualized Violence course available to all faculty, staff, and students</li> <li>Make the online Preventing Sexualized Violence course mandatory for all incoming students</li> <li>President will consult with unions on an approach for implementation of the mandatory Preventing Sexualized Violence course for union members</li> </ul>	<i>Create an on-campus equity, diversity, an inclusion office</i>  <i>Additional resources</i>  <i>Training</i>  <i>Education and awareness</i>  <i>Improve climate and culture</i>  <i>Improve trust and safety on campus</i>
	Year 2–3	<ul style="list-style-type: none"> <li>Continue to review established best practices and research to inform the training offered</li> <li>Make the online Preventing Sexualized Violence course mandatory for all faculty and staff</li> </ul>	
<b>4.1.5 Leverage feedback and data to inform decision making</b> VP People and Culture	Year 0–1	<ul style="list-style-type: none"> <li>Continue to collect information regarding initiatives, best practices, and research in relation to work of the EDI and Human Rights department</li> <li>Obtain information regarding experiences of other institutions with collection of workforce diversity information to inform future planning</li> </ul>	<i>Create an on-campus equity, diversity, an inclusion office</i>  <i>Data informed decision making</i>
	Year 2	<ul style="list-style-type: none"> <li>Take actions to welcome voices from members of underrepresented and marginalized groups to help inform the initiatives of the EDI and Human Rights department</li> </ul>	
	Year 3–5	<ul style="list-style-type: none"> <li>Collect workforce diversity information, guided by best practices, to create baseline information to better inform future decision making in equity, diversity, and inclusion policies and processes.</li> </ul>	

ADDRESSING ISSUES and RESPONSIBILITY	TIMELINE	SUPPORTING ACTIONS	UPEI REVIEW RECOMMENDATIONS and CAMPUS ISSUES ADDRESSED
<b>4.1.6 Cross-departmental communication to improve supports and services</b> VP People and Culture VP Academic and Research VP Administration and Finance	Year 1–3	<ul style="list-style-type: none"> <li>• Work collaboratively with campus partners who provide services to underrepresented or marginalized groups including International Students Office, Accessibility Services, and Student Affairs</li> <li>• Work with Human Resources to improve accommodations processes for faculty and staff and make the information easily available</li> <li>• Create a permanent EDI in Employment Systems Advisor position to continue to make EDI improvements to employment related processes on an ongoing basis</li> <li>• Coordinate processes of student-related investigations among the offices of SVPRO and supports within Student Affairs</li> <li>• Formalize cross-departmental coordination in relation to harassment, discrimination, racism, or sexual violence</li> <li>• Work collaboratively with Deans/Associate Deans to provide advice and guidance on EDI initiatives led by/within Faculties.</li> </ul>	<i>Create an on-campus equity, diversity, an inclusion office</i>  <i>Improve practices related to harassment and discrimination</i>  <i>Improve practices related to sexual violence</i>  <i>Improve information sharing and communications processes</i>  <i>Improve climate and culture</i>
	Year 3	<ul style="list-style-type: none"> <li>• Encourage the development of EDI liaisons across campus</li> </ul>	
<b>4.1.7 Offer informal resolution</b> President Senior Executive Team	Year 1	<ul style="list-style-type: none"> <li>• Build capacity for informal resolution methods applicable to matters under the Sexual Violence Policy and a new Harassment and Discrimination Policy</li> </ul>	<i>Create an on-campus equity, diversity, an inclusion office</i>  <i>Informal resolutions</i>  <i>Improve climate and culture</i>  <i>Improve trust and safety on campus</i>



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

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

ADDRESSING ISSUES and RESPONSIBILITY	TIMELINE	SUPPORTING ACTIONS	UPEI REVIEW RECOMMENDATIONS and CAMPUS ISSUES ADDRESSED
<b>4.2.1 Create NDA policy</b> President Board of Governors	Year 1	<ul style="list-style-type: none"> <li>Develop a policy that complies with all aspects of the PEI Non-disclosure Agreements Act</li> <li>Commit to not using any 'fact of' language in any necessary NDAs</li> <li>Make the policy easily accessible</li> </ul>	<i>Restrict the use of NDAs</i>  <i>Leadership training</i>  <i>Education and awareness</i>
	Year 2	<ul style="list-style-type: none"> <li>Provide training on Non-disclosure Agreements Act and new policy to Board of Governors, Senior Executive Team, and Deans</li> </ul>	<i>Improve trust and safety on campus</i>  <i>Improve climate and culture</i>
<b>4.2.2 Report NDA-related terminations and resignations to Board of Governors</b> President VP People and Culture Board of Governors	Year 1	<ul style="list-style-type: none"> <li>Send regular reports to the Board of Governors on terminations and resignations, and if any were associated with an NDA</li> </ul>	<i>Restrict the use of NDAs</i>

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

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

ADDRESSING ISSUES and RESPONSIBILITY	TIMELINE	SUPPORTING ACTIONS	UPEI REVIEW RECOMMENDATIONS and CAMPUS ISSUES ADDRESSED
<b>4.3.1 Replace the Fair Treatment Policy</b> Board of Governors President Senior Executive Team	Year 0	<ul style="list-style-type: none"> <li>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</li> <li>Instruct the Fair Treatment Advocate to use a variety of investigators in their investigations</li> </ul>	<i>Improve practices related to addressing harassment and discrimination</i>  <i>Create a new harassment and discrimination policy</i>  <i>Use a variety of external investigators</i>
	Year 1–2	<ul style="list-style-type: none"> <li>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</li> <li>Ensure the new policy incorporates all recommendations of the UPEI Review</li> <li>Ensure the new policy reflects feedback from survivors of harm at the University</li> <li>Ensure the policy is trauma-informed and procedurally fair</li> <li>Ensure the new policy aligns with legislative requirements, such as PEI Occupational Health and Safety Act and Employment Standards Act</li> </ul>	<i>Training</i>  <i>Improve trust and safety on campus</i>  <i>Improve climate and culture</i>
	Year 3–5	<ul style="list-style-type: none"> <li>Build information about human rights and health and safety obligations applicable to work and clinical placements into the program manuals for students in applicable programs</li> </ul>	
<b>4.3.2 Communicate policy to campus</b> President VP People and Culture	Year 1	<ul style="list-style-type: none"> <li>Make the policy easily available to the campus community</li> </ul>	<i>Improve practices related to addressing harassment and discrimination</i>
	Year 2	<ul style="list-style-type: none"> <li>Create materials to communicate the policy to UPEI community in easy-to-understand language</li> <li>Develop and deliver training on the new policy</li> </ul>	<i>Training</i>  <i>Education and awareness</i>

ADDRESSING ISSUES and RESPONSIBILITY	TIMELINE	SUPPORTING ACTIONS	UPEI REVIEW RECOMMENDATIONS and CAMPUS ISSUES ADDRESSED
			<p>Create a new harassment and discrimination policy</p> <p>Improve information sharing and communications processes</p>
<b>4.3.3 Applications for harassment and discrimination reporting</b> President VP People and Culture	Year 3	<ul style="list-style-type: none"> <li>Collect information regarding harassment and discrimination complaint management applications/ software to assess suitability for UPEI</li> </ul>	<p>Improve practices related to addressing harassment and discrimination</p> <p>Data and reporting</p>

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

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

ADDRESSING ISSUES and RESPONSIBILITY	TIMELINE	SUPPORTING ACTIONS	UPEI REVIEW RECOMMENDATIONS and CAMPUS ISSUES ADDRESSED
<b>4.4.1 Finalize revisions to the Sexual Violence Policy</b> Board of Governors President	Year 1	<ul style="list-style-type: none"> <li>Finalize revisions to the UPEI Sexual Violence Policy</li> <li>Ensure the new policy is comprehensive and implements all the recommendations of the UPEI Review</li> <li>Ensure the revised policy is trauma-informed, procedurally fair, and conforms to legislative requirements</li> <li>Ensure that the experiences of victims of sexual harassment/assault, including within the context of student residences, are in the revisions to the Policy</li> </ul>	<p>Improve practices related to addressing sexual violence</p> <p>Revise the Sexual Violence Policy</p> <p>Improve accountability</p> <p>Appeals</p>
<b>4.4.2 Implement the new Sexual Violence Policy</b> Board of Governors President	Year 0	<ul style="list-style-type: none"> <li>Ensure there is ongoing communication between SVPRO and residence life administration</li> </ul>	<p>Improve practices related to addressing sexual violence</p>
	Year 1–2	<ul style="list-style-type: none"> <li>Communicate the new policy in a timely manner</li> <li>Ensure training is provided to the Board, Senate, and Senior Executive Team on the new policy</li> <li>Make the piloted Sexual Violence Response Team permanent and finalize terms of reference</li> </ul>	<p>Revise the Sexual Violence Policy</p> <p>Leadership training</p> <p>Coordinated response team approach</p>

ADDRESSING ISSUES and RESPONSIBILITY	TIMELINE	SUPPORTING ACTIONS	UPEI REVIEW RECOMMENDATIONS and CAMPUS ISSUES ADDRESSED
		<ul style="list-style-type: none"> <li>Strengthen and clarify pathway for respondent support</li> <li>Whenever possible, provide advance notice of delivery of investigation results to the parties</li> <li>Provide investigation results to the respondent's internal support provider</li> </ul>	<i>Increased support for parties</i>  <i>Investigations</i>  <i>Improve trust and safety on campus</i>  <i>Improve climate and culture</i>
<b>4.4.3 Communicate the policy to campus</b> President VP People and Culture	Year 1	<ul style="list-style-type: none"> <li>Make the policy easily available to the campus community</li> </ul>	<i>Improve practices related to addressing sexual violence</i>  <i>Improve information sharing and communications processes</i>
	Year 2–3	<ul style="list-style-type: none"> <li>Create materials to communicate the policy to UPEI community in easy-to-understand language</li> <li>Develop and deliver training on the new policy</li> </ul>	<i>Training</i>  <i>Education and awareness</i>
<b>4.4.4 Implement mandatory sexual violence training for all campus members</b> President Senior Executive Team	Year 0–1	<ul style="list-style-type: none"> <li>Make the online Preventing Sexualized Violence course available to all faculty, staff, and students</li> <li>Make the online Preventing Sexualized Violence course mandatory for all incoming students</li> <li>President will consult with unions on an approach for implementation of the mandatory Preventing Sexualized Violence course for union members</li> </ul>	<i>Improve practices related to addressing sexual violence</i>  <i>Training</i>  <i>Education and awareness</i>
	Year 2–3	<ul style="list-style-type: none"> <li>Make the online Preventing Sexualized Violence course mandatory for all faculty and staff</li> </ul>	<i>Improve campus climate and culture</i>  <i>Improve trust and safety on campus</i>  <i>Improve climate and culture</i>
<b>4.4.5 Collect statistical information</b> VP People and Culture	Year 0–1	<ul style="list-style-type: none"> <li>Collect statistical information on sexual violence disclosures from a victim-centered lens</li> <li>Implement process to allow monitoring of trends</li> </ul>	<i>Improve practices related to addressing sexual violence</i>  <i>Data and reporting</i>
	Year 3	<ul style="list-style-type: none"> <li>Collect information regarding sexual violence complaint management applications/software to assess suitability for UPEI</li> </ul>	<i>Improve campus safety</i>

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

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

ADDRESSING ISSUES and RESPONSIBILITY	TIMELINE	SUPPORTING ACTIONS	UPEI REVIEW RECOMMENDATIONS and CAMPUS ISSUES ADDRESSED
<b>4.5.1 Establish anonymous and confidential feedback channels regarding violence, sexual violence, harassment, and discrimination</b> President Senior Executive Team	Year 2–3	<ul style="list-style-type: none"> <li>• Include an explanation of how anonymous and third-party reports will be handled under the new Sexual Violence Policy, Harassment and Discrimination Policy, and updated Violence Prevention Policy</li> <li>• Collect information on electronic reporting and tracking tools</li> </ul>	<i>Improve practices related to addressing sexual violence</i>  <i>Create a culture of listening</i>  <i>Preliminary issues</i>  <i>Data and reporting</i>  <i>Improve information sharing and communications processes</i>  <i>Improve trust and safety on campus</i>
<b>4.5.2 Respond respectfully to those who report issues regarding violence, sexual violence, harassment, and discrimination</b> President Senior Executive Team	Year 0–5	<ul style="list-style-type: none"> <li>• Review processes regarding violence, sexual violence, harassment, and discrimination to ensure they are designed reflecting principles of safety and respect</li> <li>• Create pathways for sexual violence or harassment and discrimination disclosures and complaints that are clear</li> </ul>	<i>Improve practices related to addressing sexual violence</i>  <i>Improve practices related to addressing harassment and discrimination</i>  <i>Create a culture of listening</i>  <i>Preliminary issues</i>  <i>Improve information sharing and communications processes</i>  <i>Data and reporting</i>  <i>Improve campus trust and safety</i>



# **UPEI ACTION PLAN APPENDICES**

## APPENDIX 1 – UPEI ACTION PLAN DEVELOPMENT TIMELINE



• June 14, 2023 .....	Release of <i>UPEI Review</i> and Recommendations
• June 15, 2023 .....	Changes to UPEI Senior Executive Team
• June 21, 2023 .....	Resignation of the Chair of the Board of Governors
• June 26, 2023 .....	UPEI Town Hall
• July 19, 2023 .....	UPEI Staff Town Hall
• August 29–September 7, 2023 .....	Calls for Expressions of Interest for UPEI Action Plan Advisory Group
• September 15, 2023 .....	UPEI Action Plan Advisory Group Confirmed
• September–November 2023 .....	Campus Listening Sessions for Students, Staff, and Faculty
• September–November 2023 .....	UPEI Action Plan Advisory Group Consultations
• November 29, 2023 .....	High-level preliminary outline of draft Action Plan provided to UPEI Action Plan Advisory Group to ensure group's input is accurately captured for next steps in ongoing drafting of draft Action Plan
• December 2023 .....	Continued work on drafting UPEI Action Plan, including further defining goals and actions
• January 2024 .....	Posting of Draft UPEI Action Plan to Website for Community Input
• January–February 2024 .....	Revision of UPEI Action Plan based on Community Input; Ongoing Internal Consultation and Planning
• February–March 2024 .....	Governance Reviews and Approval of UPEI Action Plan
• April 2024 .....	Launch of UPEI Action Plan

The UPEI Action Plan development process was drafted and shared with the community online following the release of the *UPEI Review*.

## APPENDIX 2 – UPEI ACTION PLAN ADVISORY GROUP: OVERVIEW AND GUIDANCE

### OVERARCHING FEEDBACK

(Provided in full by Sara Roach Lewis, UPEI Action Plan Advisory Group Facilitator)

The Action Plan Advisory Group (APAG) was tasked to read the *UPEI Review* and Recommendations, examine issues, and provide perspectives. The 21-member group was asked to give input on actions and expectations of the community in order to rebuild trust and safety within the UPEI learning and work environments.

The *UPEI Review* exposed bleak and challenging times for many on campus.

Folks joined the group with questions, skepticism, and mistrust. They also joined with a desire to make things better for the UPEI community.

The approach to actively seek advice and guidance from both campus and the broader community to guide the development of the UPEI Action Plan is a promising example of a new, inclusive direction. We hope the work of the APAG marks the beginning of a new era at UPEI.

The group's diversity fostered a spirit of goodwill and brought a wide range of valuable perspectives to this essential task.

Given the constraint of only ten half-day sessions, we were aware from the outset that achieving perfection would be challenging. More time would have been preferable. We also acknowledged that moving to action is a decisive next step in holding leadership accountable and supporting the community to begin the much-needed healing journey.

After deliberating at length about the recommendations in the *UPEI Review* (collectively, we spent more than 650 hours on them), two key themes

emerged: accountability and transparency—the need for accountability and transparency intertwined through every discussion.

Accountability encompasses much in an academic institution. UPEI must uphold its educational values with integrity, maintain high standards of teaching and research, ensure proper use of resources, and respond effectively to the needs of its students, staff, and faculty.

It also means taking responsibility for institutional decisions and their impacts and correcting mistakes when they happen.

Transparency is showing your work. It includes openly sharing information related to governance, operations, and performance. It means providing clear, accessible, and accurate information about the institution's policies, financial health, decision-making processes, and outcomes of academic programs.

Given the inherent lack of trust across campus, these two principles must guide UPEI as it addresses the immediate recommendations of the *UPEI Review* as a starting point and in cultivating a more deeply embedded culture of equity, diversity, and inclusion for the long term.

In our feedback, we provide examples of what transparency and accountability should look like as both direction and inspiration.

As UPEI develops the Action Plan in response to the recommendations, we have identified five key priorities which must be front of mind. The Action Plan must:

### **1) Have intersectionality as the starting point**

Intersectionality, the overlap of various identities such as race, sex, class, ability, socio-economic status, religion, and gender contributes to the systemic oppression and interdependent systems of discrimination, disadvantage, privilege or advantage.

The *UPEI Review* strongly recommends that issues of racism, sexism, homophobia, transphobia, and ableism be addressed.

By centering the Action Plan on the nuanced needs of those most vulnerable to intersectional discrimination, we inherently create a framework that benefits everyone.

Fortunately, through UPEI's existing commitment to the Scarborough Charter and Universities Canada's Commitments to Truth and Reconciliation, the University already has a foundation to guide its action plan.

These existing agreements focus on addressing systemic racism and promoting inclusive practices and provide a valuable framework for UPEI's efforts to create a more equitable and supportive academic environment. This inclusive approach will ensure that no one is left behind and that the action steps implemented are effective and empathetic, leading to a healthier and more inclusive community where the fundamental rights and well-being of all are promoted and protected.

### **2) Be trauma-informed**

Harassment and bullying lead to a toxic work and learning environment. A trauma-informed approach recognizes the profound impact this has on many people. Traumatic experiences can leave deep psychological scars, affecting trust, well-being, and performance.

By adopting a trauma-informed Action Plan, we ensure the strategies are responsive to the needs of those directly affected and seek to prevent further harm.

This means creating welcoming spaces for reporting and healing, providing access to appropriate support services, and ensuring that leadership, staff, and faculty are trained to respond to disclosures with empathy and understanding.

A great deal of healing is needed on campus. For any healing to occur, the Action Plan must shift the institutional culture from one that continues to (re)traumatize people to one that fosters recovery, empowerment and resilience.

Integrating trauma-informed approaches into policy, procedures, and culture is vital.

### **3) Follow evidence-based approaches**

An evidence-based approach will help ensure that the strategies outlined in the action plan are supported by a combination of critical thinking and the best available evidence (Barends et al., 2014).

The independent third-party reviewers acknowledged that their recommendations require broader and more detailed action planning. The APAG believes the recommendations must be addressed thoughtfully, including more in-depth consideration of relevant topics and interventions; of what is known, unknown, or contested.

For example, unconscious bias training is currently a popular means to foster diversity, equity, and inclusion. However, its effectiveness appears to be mixed, and it comes with risks of adverse side effects—still, existing literature points to promising ways to provide more effective variations

of such programs. Knowledge syntheses and other research in this area can facilitate evidence-informed decisions and actions (e.g., Atewologun et al., 2018; Carter et al., 2020; FitzGerald et al., 2019; Kim & Robertson, 2021; Möller et al., 2023; Schmader et al., 2022).

Combining cumulative findings and primary research on topics like diversity training (Bezrukova et al., 2016; Kalinoski et al., 2013; Kawaski & Zota, 2021) and sexual violence prevention (Ruvalcaba et al., 2022, Senn et al., 2020), including bystander interventions (Bouchard et al., 2023; Mujal et al., 2021) and social marketing campaigns (Lee et al., 2023), could increase the probability that programs implemented in response to the *UPEI Review* will be effective.

Similar considerations exist for the design and delivery of leadership training and development interventions (Avolio et al., 2009; Lacerenza et al., 2017). These examples only illustrate that existing evidence and perspectives can help inform UPEI's response.

In our commitment to a genuinely inclusive and intersectional Action Plan, UPEI must actively explore and integrate diverse and culturally informed approaches.

It is important to note that intersectional, trauma-informed approaches to support EDI work are continually evolving. We must act on the best available knowledge and be open to new information as it emerges or is identified.

The APAG discussed the importance of tracking and analyzing our institutional data. This will help UPEI be better equipped to iterate the Action Plan to our unique context, thus enabling us to make informed decisions which reflect the specific needs and experiences of our community members.

#### **4) Be mindful of power dynamics and imbalances**

Hierarchical structures like that at UPEI, by their very design, create levels of authority and subordination, inherently establishing power imbalances. At the core, these hierarchies are intended to organize and streamline decision-making processes, delineate responsibilities, and ensure clear, accountable reporting structures.

The *UPEI Review* outlines, in painful detail, how power without accountability created a toxic work and learning environment, a place where a negative work culture flowed from the top—a place where people could not voice concerns or challenge the status quo without risk of retribution.

Systemic bias and inequality are entrenched in hierarchies. Some argue it is impossible to break them down within such a structure, but we must try.

Within this hierarchy, people feel power imbalances in expected and unexpected ways. There is no question, however, that some positions hold more authority. Power imbalances manifest in and across administration, faculties, and departments with unequal consequences. The Review documents how faculty, sessionals, staff, administration, contractors, unions, and students can be victims and/or perpetrators.

Careful checks and balances are necessary to prevent the abuse of power at all levels. This is the only way to ensure that people feel valued and heard and can contribute and learn without fear of marginalization or retribution.

To the Board of Governors, the Senate, the interim and new president, and senior members of the administration: you must be cognizant of your responsibility to this institution and its members.

At every step, with every decision, you must work to break down silos; to rebuild bridges; to become more diverse; to ensure authentic, meaningful engagement across the institution.



## 5) Be properly resourced

The *UPEI Review* calls for sweeping change to address serious problems and create a culture change on campus. This won't happen without significant resources—time, money, people, space.

Where money is spent indicates priority. The APAG believes significant resources must be dedicated to this Action Plan and recognizes that there will be constraints.

APAG members worry resources will be diverted from other areas, such as academic programming and services for students. The APAG calls on the provincial government to provide additional funding to UPEI. This will ensure this important work is done, but not at the expense of other vital programs and services.

Transparency in budget and decision-making is critical in developing the Action Plan. It is important to make accessible the rationale for the sequencing of actions and the allocation of resources.

Engagement and consultation in overall budget processes contribute to transparency and trust-building. Take for example, clarity on how much revenue comes from international students as compared to how much is invested in services and support programs for them.

In addition to our overall feedback to support the development of the UPEI Action Plan, we discussed the importance of good communication. It is the cornerstone of cultural transformation.

As UPEI works to change campus culture, the role of an effective communications department cannot be overstated.

Good campus communication can help transform the implementation of an Action Plan from a top-down directive into a community-engaged

movement, thus fostering a shared sense of ownership and accountability that is essential for lasting cultural change.

We appreciate that UPEI has had ongoing communications about the *UPEI Review*, with regular updates to the community and dedicated pages on the website.

Official UPEI communications continue to be a source of distrust for folks. People worry messages are crafted and sanitized due to legal concerns.

We understand that managing the flow of communications for an institution is essential. People expressed frustration, however, that there are no real mechanisms for folks on campus to communicate with each other.

This contributes to a lack of cross-departmental collaboration, compartmentalized information flow and often, as a result, silos.

We advise a review of the mission and objectives of the communications department, with a strong focus on finding ways to improve cross-campus communication.

Effective communication is not a one-way street. It requires active listening and a willingness to engage in meaningful dialogue. As UPEI implements these recommendations, the ability for everyone to listen to feedback, understand the community's concerns, and adapt strategies accordingly will be vital.

Finally, UPEI should complete a review of its administrative structure. Given the updates and changes to policies, important issues need further consideration: reporting structures, a better understanding of the People and Culture role, and ensuring an administrative structure that contributes to a positive work and learning environment.

In a community where many people are angry, frustrated, hurt, embarrassed, and disappointed by what the *UPEI Review* revealed, it's easy to wonder how UPEI will move on from here.

As members of the APAG, we've heard the concerns and are worried ourselves. The gravity and complexity of the *UPEI Review* is far too significant to be dismissed or addressed superficially. UPEI is too important to all of us for this to define its future.

For 55 years, UPEI has stood as a cornerstone of our Island, a pivotal force in shaping the fabric of our community; influencing every aspect, from government and health, to arts and culture, environment, business, and education.

Our final piece of general feedback is to highlight who the Action Plan is for.

There is no question that much of the responsibility lies on leadership to ensure that time, energy, and resources are dedicated to implementing the Action Plan and putting mechanisms in place to avoid future abuse of power.

We hope that everyone on campus sees a role for themselves here. We also acknowledge that for some, that's a tall order. During our first meeting, an APAG member observed that participating in this process required members to place "trust in an institution that doesn't necessarily deserve it." That sentiment was widely shared.

Another APAG member likened the Action Plan to a script for a play. Just as in a theatrical production, where the success of the play depends on the contributions of all, so too does the enactment of this Action Plan rely on the collaborative effort of every member of the campus community.

The script is not without its challenges; it demands not only our participation but also our hope—a hope which must be fostered and earned.

It is in this complex interplay of skepticism and hope, of caution and participation, that we find the true test of the collective commitment to change. We encourage your engagement to be discerning yet hopeful, ensuring that the steps forward are as grounded as they are aspirational.

We invite you to find your part in this Action Plan, to contribute to a campus community that champions diversity, equity, and inclusion so every voice is heard and valued.

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## ADVISORY GROUP MEMBER BIOGRAPHIES

**Eileen Conboy (she/her):** Eileen Conboy is a trauma therapist in Charlottetown and the sexual violence prevention and response coordinator with the Government of PEI. She works to ensure that survivors are treated with dignity while we work together to end sexual and gender-based violence.

**Jane Ledwell (she/her):** Jane Ledwell was appointed to the Group as a community representative. Her full-time work is as executive director of the PEI Advisory Council on the Status of Women. She is also a writer, editor, and author with past experience at UPEI as a sessional instructor and staff person.

**Nola Etkin (she/her):** Nola Etkin is the Dean of Science and has been a professor of chemistry at UPEI since 1997. Nola's involvement in equity work began as a PhD student at the University of Alberta where she was involved in the local Women in Science and Engineering group and co-chaired the campus LGBTQ group. This involvement has continued throughout her career—she was a founding co-chair of Abegweit Rainbow Collective, which was formed to provide support and advocacy to PEI's 2SLGBTQ+ community and is currently a member of the UPEI Joint Equity Committee and the UPEI EDI Steering Committee.

**MJ Wardle (she/her):** MJ was born and raised in Barbados, immigrated to Canada in 2009, and began working with UPEI in Facilities Management in 2019. MJ is the shop steward with IBEW. In her spare time, she enjoys riding her motorcycle and spending time with her grandson.

**Sobia Ali-Faisal (she/her):** As the executive director of BIPOC USHR, a non-profit organization committed to serving racialized communities on Prince Edward Island, Sobia is grateful to apply the knowledge and expertise she gained from her PhD in Applied Social Psychology to her role. Sobia intertwines her Islamic faith with her commitment to liberation work. She

views her faith as a guiding force, inspiring her to challenge and dismantle oppressive structures. Sobia's values are rooted in anti-colonial and anti-oppressive principles, and she tries to work toward the liberation of all oppressed peoples. Sobia is an alumnus of UPEI, having completed her undergraduate degree at the institution, and has taught at the University in the Department of Psychology.

**Sasha V Nandlal (she/her):** With ten years of experience in inclusive education practices, Sasha V Nandlal is the Canadian Committee of Graduate Students in Education (CCGSE) director of EDIIA and the University of Prince Edward Island Graduate Senate Representative, serving as a consultant to policy and program development. Completing her master's thesis examining the Instructional Practices of Educators working with Special Needs Students at a Trinidadian Secondary School during COVID-19 from the University of New Brunswick, Sasha is now at UPEI pursuing her PhD in Equity, Diversity, and Inclusion concepts and large-scale assessment, and looks forward to continuing her practice in the field.

**Blake Jelley (he/him):** Dr. Jelley represents faculty members and is a full professor of management in the UPEI Faculty of Business. He holds a PhD in industrial-organizational psychology and a professional designation as a Chartered Professional in Human Resources (CPHR). Blake currently serves on the CPHR PEI and CPHR Canada Boards of Directors and is the PEI Employment Standards Board's vice-chair. He is a fellow of the Center for Evidence-Based Management, and previously served as chair of the Canadian Society for Industrial and Organizational Psychology and co-chair of the UPEI-UPEIFA Joint Equity Committee.

**Nicole Jay (she/her):** Nicole Jay was appointed to the Group as an undergraduate student representative. She is in her fourth year of the Bachelor of Arts program at the University, with a major in Psychology and a minor in English. She is a member of the UPEI swim team, as

well as a volunteer with UPEI Medical Brigades. Nicole joined the Action Plan Advisory Group to contribute her insights on creating an improved University environment from a student-focused lens, with psychological well-being as a top priority.

**Nabeel Zafar (he/him):** As the graduate student representative, and a professional having an 18-year career in teaching, educational leadership, and policy in Pakistan's premier institutions, Nabeel has a deep commitment to academia. Possessing degrees in engineering and a master's degree in quality management, he has played a crucial role in shaping national education policies. Recognized as a distinguished alumnus of the US Department of State's Community College Administrator program, he has made significant contributions, including playing a pivotal role in Pakistan's educational landscape. Currently serving as the president of UPEI's Graduate Student Association, he brings substantial academic depth to the APAG.

**Sharon Anderson (she/her):** As an educator and administrator, predominantly at the senior high level, for over 40 years in PEI, Sharon has always had a keen interest in learning. She believes deeply in the power of education and its impact on society. She currently sits on the Board of Directors of Pat and the Elephant and also serves as chair for the Net Zero Advisory Committee. She proudly represents the UPEI Alumni Association on the UPEI Action Plan Advisory Group.

**Lucky Fusca (they/them):** Lucky, a transgender/non-binary leader, serves as the executive director of the PEI Transgender Network. They advocate for the rights and inclusion of transgender and gender-diverse individuals in Epekwitk and beyond. With a background as Pride PEI's board chair, Lucky brings significant experience in tackling issues like sexual violence and discrimination. They are dedicated to fostering inclusive dialogues focused on gender and sexuality equity, with a strong commitment to intersectionality, decolonization, and anti-racism.

**Sharon O'Brien (she/her):** After a distinguished 25-year career, Sharon retired two years ago from the position of executive director at the

Mi'kmaq Family Resource Centre. There she focused on supporting and advocating for off-reserve families, providing essential services such as parenting courses and a HeadStart program for children, and guiding parents through challenging times. Sharon also played a significant role in the PEI Advisory Council on the Status of Women, serving as a member and later as chair. Sharon has been a board member of PEI Family Violence Prevention Services and previously served on the board of Community Legal Information Services.

**Jaclyn Borden (she/her):** Jaclyn holds a Master of Education in Leadership with a specialization in Inclusion from UPEI. Her academic focus has been on leading change and enhancing educational experiences for equity-deserving students. With over 15 years dedicated to advocating for equity, diversity, and inclusion, she has also developed significant expertise in addressing ableism on campus and supporting diverse student communities facing discrimination and harassment. Their educational background and experiences position them as a knowledgeable advocate in the field of equity and inclusion.

**June Jenkins Sanderson (she/her):** June's educational background in environmental sciences and counselling therapy shaped her career in counselling therapy, conflict resolution, and leadership training. Her work focused on supporting vulnerable populations, a foundation she built upon during her time with the Canadian Red Cross. Her role as school counsellor led to her earning the Premier's Award in family violence prevention. She developed and led workshops on topics such as stress, resilience, and work-life balance. Her volunteer work focuses on social and environmental justice.

**Missy Chareka:** Missy is the current assistant manager of residence culture at the University of Prince Edward Island. With a strong educational background and diverse professional experience at various academic institutions nationally and internationally, Missy is dedicated to promoting equity, wellness, and student-centred focus in academic settings. Her academic pursuits are rooted in psychology and education,

which have guided her in providing a deep understanding of social dynamics, inequities, and the practical aspects necessary to address institutional challenges and change.

**Shannon Snow (she/they):** Shannon works at the University of Prince Edward Island in the Experiential Education department, collaboratively developing programming for students with faculty, staff, and external partners. Their education includes a Bachelor of Arts and Bachelor of Education from UPEI, and a Master of Education and some PhD work from York University, all with a focus on education and queer theory. They are a proud member of the 2SLGBTQ+ community and are passionate about anti-oppressive community-building work in all its varied forms.

**Karen MacDonald (she/her):** Karen MacDonald was appointed chief executive officer of Island Waste Management Corporation in May 2021. Karen has served in several public service leadership roles including acting deputy minister of Justice and Public Safety and deputy attorney general, and director of Community and Correctional Services. Karen holds an Executive Master of Business Administration from the University of Prince Edward Island, and a Criminology degree from Carleton University. Karen is a lifelong learner who leads with a focus on continuous improvement and healthy organizational culture. With over 30 years in public service, Karen is proud to serve Islanders at work and in her community.

**Saugat Shrestha (he/him):** Saugat Shrestha, a 19-year-old undergraduate at the University of Prince Edward Island (UPEI), is studying Psychology and Philosophy. He serves as the undergraduate student representative on the Action Plan Advisory Committee (APAG). In this role, Saugat demonstrates his commitment to creating positive change.

**Dave Csernyik (he/him):** David has served 30 years as a police officer with the UPEI Police and UPEI Security Services. He also represents CUPE 501 in the APAG. As a police officer, David has encountered many issues that have been key topics in APAG meetings. By participating in this group, he hopes that he has played a part in UPEI becoming more than just a place

for higher learning and that he can help it become known as one of the safest universities in Canada. He strives to make UPEI a safe and respectful learning environment for everybody.

**Margot Rejskind (she/her):** Dr. Margot Rejskind is a Charlottetown-based conductor; she is artistic director of Island Choral Society, Forte Men's Choir, and the professional group Luminos Ensemble & Chamber Orchestra. She taught in the UPEI Department of Music from 2013–2022, and before that was on faculty at the Royal Conservatory of Music in Toronto. Margot joined the executive committee of the UPEI Faculty Association (UPEIFA) in 2019, and became vice-president in 2020. She served as lead negotiator for the UPEIFA in 2022–2023 through a challenging round of bargaining that included a four-week strike. Margot is proud to serve as the UPEIFA's first executive director.

**Miles Turnbull (he/him):** Miles is a proud alumnus of UPEI (BA '87). He has worked at UPEI on and off since 1988. Miles returned to UPEI as Dean of Education on July 1, 2023! He is thrilled to be back home on the Island.

## ADVISORY GROUP GUIDANCE ON THE RECOMMENDATIONS FROM THE UPEI REVIEW

All APAG feedback, advice, and guidance in the following table is 100% consensus based with the exception of one point.

RECOMMENDATIONS RELATED TO ACCOUNTABILITY AND ACKNOWLEDGEMENT		
<i>Recommendation</i>	<i>Additional Context</i>	<i>Rebuilding trust and safety within learning and work environments</i>
i. Make the report public	<ul style="list-style-type: none"> <li>University/Board responsibility to share a redacted copy of report with community.</li> </ul>	<p>The redacted report has been made public. It is important to continue to consider how to balance protecting the confidentiality of survivors and also honour transparency. Members of the Action Plan Advisory Group (APAG) worry that some redactions are designed to protect the university leadership rather than individual people's confidentiality.</p> <p>It is unfortunate that even in the recommendation section, there are redactions; it would have been helpful to have avoided those redactions, as it will make the audit process more challenging. As discussed in more detail in the recommendation Review climate and management practices, it will be important to determine how to assess if redacted items have seen any action or change.</p> <p>Feedback: Provide a high-level, non-identifying summary of redacted sections of the full report available to the public; alternatively, explain why sections were redacted.</p>
ii. Publicly acknowledge there is a serious problem and undertake to fix it	<ul style="list-style-type: none"> <li>University and Board of Governors, in particular, asked to restate its commitment to protect members of the community from discrimination, harassment, and sexual violence, among other things. Restate commitment to values and establish an action plan (with objectives,</li> </ul>	<p>The former Chair of the Board of Governors' public statements immediately following the release of the <i>UPEI Review</i> caused additional damage to the community and harm to the reputation of the Board of Governors. It is a positive step that he and another board member stepped down to allow for leadership renewal.</p> <p>The Board of Governors has significant work to do to regain the confidence of the UPEI community and beyond (government, PEI public). Since the <i>UPEI Review</i> was released, there have been ongoing updates from the UPEI Interim President and Board of Governors Chair and significant media attention regarding this situation. However, the APAG does not believe that the Board of Governors has acknowledged their role in the negative work- and learning-environment described in the <i>UPEI Review</i>. We believe this acknowledgement is important in repairing the harm.</p> <p>Board engagement in the action plan process, especially listening to campus community feedback is important. We would like the Board of Governors to make a public commitment to follow through on the advice of the APAG and the resulting Action Plan to the fullest extent possible.</p>

Recommendation	Additional Context	Rebuilding trust and safety within learning and work environments
	<ul style="list-style-type: none"> <li>• milestones, and timeline) for progress measurement and accountability.</li> </ul>	<p>In disseminating the Action Plan, we would like the Board of Governors, and senior administration, to be here on campus in person for direct communication and discussion.</p> <p>Greater transparency and accessibility in Board decisions, governance processes, and decision-making in the form of minutes, with minimal use of in-camera decision-making, will help.</p> <p>For example, one could argue the Board is already transparent. A good amount of information about the BoG is publicly available on the UPEI website (schedule, minutes, agenda, etc.).</p> <p>Transparency in this climate could be improved by introducing the following mechanisms, among others: Proactively reminding the UPEI community of the meeting dates and times. Proactively communicating meeting minutes and updates. Proactively explaining why people must register one week in advance to attend board meetings. Noting in the minutes how much time was spent in each meeting in camera.</p> <p>The commitment to ongoing training (noted in Refresh membership of the Board of Governors below) will also help board members have the skills they need to deliver on their governance responsibilities and demonstrate the board's commitment to professionalism, ethical conduct, and inclusive practices.</p>
iii. Annual Audits to measure progress	<ul style="list-style-type: none"> <li>• University will engage in audits to assess execution of the action plan and progress (or lack of it) for next five years.</li> <li>• Need to recognize low trust in Board of Governors and University.</li> <li>• Auditor to be determined based on consultation with the Government of Prince Edward Island.</li> </ul>	<p>The APAG believes an external audit of this action plan is a significant step for accountability and transparency.</p> <p>We believe auditing the UPEI Action Plan is too big for one person. And while the <i>UPEI Review</i> recommends a senior government official take on the role, given PEI's size and interconnectedness, we believe an independent external auditor located off PEI is the best approach.</p> <p>An external auditor working with an internal audit committee is the structure the APAG thinks would work best.</p> <p>We suggest UPEI look to other audit processes both in academic settings (e.g., King's College) and other sectors to capture best practices. For example, we anticipate needing specialized auditors (e.g., Equity, Diversity, Inclusion). The PEI Advisory Council Equality Report Card is an excellent example of an audit process that has been working effectively for several decades on PEI. It measures the government's response and action on gender equality issues.</p> <p>The audit should be granular enough to ensure it is assessing impact yet able to be completed in a timely fashion. We anticipate yearly audits with a baseline established in Year 1. The Action Plan should identify a person/role responsible for each recommendation (including responding to the auditor/committee).</p>

<i>Recommendation</i>	<i>Additional Context</i>	<i>Rebuilding trust and safety within learning and work environments</i>
		<p>The audit should establish objectives, scope, responsibility, and criteria so there is a clear understanding of what is being measured. We also recognize that some recommendations will be easier to audit than others. When it comes to culture change, this requires contribution from everyone. We suggest there are a few key questions that a representation of campus communities is invited to answer for measuring culture change. It will be important for the audit to report on both what is not working and what is. Finally, the public audit reports should be released promptly as submitted.</p>

RECOMMENDATIONS RELATED TO STRENGTHEN LEADERSHIP		
<i>Recommendation</i>	<i>Additional Context</i>	<i>Rebuilding trust and safety within learning and work environments</i>
i. Selection of the next President and review of their performance	<p>Next president must have:</p> <ul style="list-style-type: none"> <li>• clear vision on how to address issues within the report</li> <li>• ability to manage change</li> <li>• deep understanding of workplace fairness, harassment, discrimination, EDI),</li> <li>• and commitment to these issues</li> <li>• strong values</li> <li>• Candidates must be thoroughly vetted.</li> </ul>	<p>The Action Plan Advisory Group provided immediate consensus feedback to the UPEI Board of Governors because the selection process was already in progress. This included:</p> <p>The detailed job description was only accessible through the recruitment firm, which is not transparent. (The UPEI website was updated to include the full description as a result of the APAG's feedback.)</p> <p>In this climate, meaningful public (university community) input on the short-list of candidates is crucial. The APAG envisions this to include accessible presentations and opportunities to provide input, including options for anonymous feedback, as was common in past presidential searches (prior to the most recent presidential search in 2010).</p> <p>The process should accurately reflect the values UPEI is seeking in a president. How will the Selection Committee balance the educational mission and academic priorities with corporate, fiscally-based responsibilities in the vetting process?</p> <p>The final candidates should review and respond to the UPEI Action Plan (even in draft form). It is critical to have a strong understanding of the candidate's commitment, experience, and track record on EDI issues.</p> <p>The Board of Governors must take responsibility for the vetting process. This includes significant vetting beyond the references provided by candidates.</p>



Recommendation	Additional Context	Rebuilding trust and safety within learning and work environments
<p>ii. Refresh membership of the Board of Governors and enhance oversight on key issues identified in this report</p>	<ul style="list-style-type: none"> <li>• Refresh board with new people.</li> <li>• Provide enhanced oversight of the University's actions re: EDI Strategy, progress of EDI initiatives; more probative re: the nature and number of complaints regarding harassment, discrimination, and sexual violence received by the University.</li> <li>• Board be informed of terminations and resignations of individuals to ensure problematic behaviour is not 'swept under the rug'.</li> <li>• Board members should have governance training, harassment/ discrimination/ respect at work and EDI training within the last two years.</li> </ul>	<p>The <i>UPEI Review</i> made it clear the important role the Board of Governors plays in leading the organization. There are two pathways for a member of the public to join the board—the government of PEI appoints people through the Engage PEI process and UPEI also has open seats.</p> <p>The PEI Government appointed five new board members in October 2023 and UPEI is appointing new members in the coming weeks, so renewal is in progress.</p> <p>There must be diversity on the Board of Governors, which can mean recruiting differently. There is a good body of best practices for ensuring board policies, practices, and recruitment create conditions for meaningful board diversity. Developing a board matrix that encompasses a robust representation of demographics, such as race, gender, and age, to ensure a rich diversity of perspectives and experiences in addition to professional, geographic, and other considerations.</p> <p>Additionally, there should be consideration for how to collaborate with Engage PEI to ensure government-appointed board members contribute to a diverse board. In addition to sharing the Board Matrix, Engage PEI should consult with the Interministerial Women's Secretariat and the Anti-Racism Office. Board diversity should be a high priority for the governance review.</p> <p>Over the coming years, as board renewal continues, it will be essential to ensure that candidates are vetted for their contribution to and experience with EDI issues.</p> <p>Through the governance renewal process, the Human Resources Committee can take the lead on ensuring appropriate oversight processes are in place. For example, the board should receive periodic (annual or quarterly) reports from the HR department with aggregate data to verify and validate that terminations and resignations are within acceptable standards for an institution of this size and scope. Regular and ongoing updates on terminations and resignations.</p> <p>The APAG believes the faculty should seek to diversify the Senate. While the Senate has less flexibility, there still should be a focus on diversifying. For example, improving the nomination and voting processes.</p> <p>The Board of Governors and Senate should engage in governance training. It equips board members with the knowledge and skills to fulfill their responsibilities, understand their role within the organization, and ensure that the board operates within its legal and ethical framework.</p> <p>Good governance training will help board members truly understand their role and empower them to provide the oversight and diligence required.</p>

Recommendation	Additional Context	Rebuilding trust and safety within learning and work environments
		<p>The board/leader role is often characterized by the phrase, “trust my abilities and question my actions.” Board members must have confidence in UPEI administration while critically evaluating their decisions and actions.</p> <p>EDI training helps create a board culture that values diversity at all levels. Mandatory, ongoing training should be integrated into the regular operations of the BoG and the Senate.</p>
<p>iii. Leadership training</p>	<ul style="list-style-type: none"> <li>Those in leadership roles at the University receive leadership training, including: <ul style="list-style-type: none"> <li>respectfully managing professional relationships including teams</li> <li>how to build and maintain a positive working and educational culture and</li> <li>developing emotional intelligence</li> </ul> </li> </ul>	<p>When it comes to leadership training, the APAG wants to see a broad definition of leadership to include: board, senate, administrators, chairs of departments, coordinators, directors, athletic leaders, student and labour unions, students who are committee members, graduate student associations, societies, and clubs.</p> <p>Leadership training can help transform toxic work cultures into more positive and productive environments. For example, effective leadership training should focus on basic managerial training, fostering cultural competence, mitigating unconscious bias, implementing policies effectively, conflict resolutions, creating inclusive environments, etc. Leaders must also be equipped with strategies for advocacy, conflict resolution, and systemic change to build and maintain a diverse and empowered workforce.</p> <p>Members of the APAG worry about the lasting effects of the culture the <i>UPEI Review</i> documented. There is much unlearning and learning that needs to happen at all levels of leadership at UPEI. A solid review of <i>The Equity Myth: Racialization and Indigeneity at Canadian Universities</i> is a good place to start. It is a data-based study of racialized and Indigenous faculty members’ experiences in Canadian universities that challenges the myth of equity in higher education.</p> <p>The APAG members agree that more comprehensive educational approaches like courses (or degrees and certificates), in addition to one-off and self-directed workshops, are needed to affect the needed culture change.</p> <p>The APAG discussed ways to ensure the training is meaningful and challenges associated with that:</p> <ul style="list-style-type: none"> <li>Opportunities for ongoing support to avoid a fallback to old habits.</li> <li>Meaningful engagement with the community as proof of adopting training.</li> <li>Commitment to learning: Building expertise over time through scheduled training sessions.</li> </ul> <p>Leadership development includes mentorship and succession planning and could be professional development for folks with leadership aspirations.</p>

<i>Recommendation</i>	<i>Additional Context</i>	<i>Rebuilding trust and safety within learning and work environments</i>
		<p>In terms of accountability:</p> <ul style="list-style-type: none"> <li>• University training calendar: Certification and training frequencies, with an online format and a reporting function to monitor completion.</li> <li>• Mechanism to measure how leaders implement new training into their role and recognition of improvement.</li> <li>• Accountability measures: Incorporating training requirements into job descriptions, growth plans, and performance appraisals.</li> <li>• Mechanism for people to signal when their leader needs additional training (e.g., flagging knowledge gaps in 360-degree reviews).</li> <li>• Determine who is responsible for managing training and compliance to ensure leaders at all levels—from the board and the president to student leaders—participate.</li> </ul> <p>In terms of content, the APAG imagined a combination of internal UPEI faculties/departments contributing their expertise to aspects of the leadership training. UPEI will also need to engage external support to introduce fresh solutions and balance internal/external expertise.</p> <p>The APAG recognizes that significant training is cost- and time-intensive. Adding training and ensuring meaningful engagement, though challenging, is still worthwhile in a space where people and dollars are stretched.</p>

## RECOMMENDATIONS RELATED TO OTHER CULTURAL INITIATIVES

Recommendation	Additional Context	Rebuilding trust and safety within learning and work environments
i. Create a culture of listening	<ul style="list-style-type: none"> <li>Regularly solicit and listen to information from employees and students as to their experiences.</li> <li>Set up systems that are geared towards asking employees and students about experiences.</li> <li>Exit interviews as tools to determine why employees are leaving.</li> <li>360 reviews of managers and leaders.</li> </ul>	<p>A culture of listening is rooted in a sincere commitment of leadership to foster trust, ensuring that every voice within the community is heard, understood, valued, and acted upon with transparency and empathy.</p> <p>It requires continuous effort to maintain open channels of communication, address systemic barriers, promote inclusivity, and facilitate a responsive environment where feedback leads to meaningful change.</p> <p>Many of the recommendations in the <i>UPEI Review</i> are specific and relatively measurable. However, working toward culture change is a broad recommendation encompassing all aspects and areas of the university and requires contribution from everyone.</p> <p>Other areas of the <i>UPEI Review</i> Recommendations and our feedback address many facets of culture change. We are restating some of them here to reinforce their role in creating the broader culture change we all wish to see in the UPEI campus community.</p> <p><b>Leadership Commitment</b> Ensure UPEI's leadership is visibly committed to change. This includes consistent messaging, active participation in training, and clear, transparent policy changes reflecting the new direction.</p> <p><b>Trauma-Informed Approach</b> Implement a trauma-informed approach across all levels of the institution (see our overarching feedback for more details and resources). This requires training for faculty and staff to be able to handle disclosures sensitively and to foster an environment where students and staff feel safe to share concerns. For example: a trauma-informed approach to creating a culture of listening avoids an over-reliance on victim story-telling.</p> <p><b>EDI and Accessibility</b> Invest in comprehensive and accessible EDI training and initiatives that move beyond basic training to programs that create and monitor lasting change. This includes opportunities for campus-wide and cross-departmental initiatives as well as opportunities for more in-depth, specialized training and development.</p> <p><b>Transparent Feedback Systems</b> Establish clear, consistent, and accessible channels for feedback that protect anonymity and ensure confidentiality.</p>

Recommendation	Additional Context	Rebuilding trust and safety within learning and work environments
<p>i. Create a culture of listening <i>[cont.]</i></p>		<p><b>Active Listening Practices</b> Train employees (including Student Union and Graduate Student Association reps) in active listening, which is a foundational component of a culture of listening. Regular listening sessions should celebrate diversity of opinions, invite difficult conversations, and allow community members to speak freely about their experiences without fear of retribution.</p> <p><b>Empowerment of Student Unions and Groups</b> Support student unions with resources and training to effectively represent and advocate for all their peers. They should be equipped to navigate UPEI's structures.</p> <p><b>Campus Events</b> Integrate regular, institution-wide events that promote open dialogue and sharing of experiences. These can help in building community and reinforcing a culture of listening.</p> <p><b>Regular Assessments</b> Conduct regular and clear cultural assessments and surveys to gauge the environment and identify improvement areas. This can include social inclusion, confidence in UPEI, sense of belonging, awareness and understanding of EDI policies.</p> <p><b>Structural Changes</b> Implement structural changes that dismantle hierarchies impeding open communication. This includes, where possible, creating spaces where individuals from all levels of the institution can interact as equals.</p> <p><b>Community Engagement</b> Engage with the wider community, including alumni, local communities, and other stakeholders to build partnerships that reinforce UPEI's commitment to a healthy environment.</p> <p><b>Mental Health Support</b> Ongoing access to mental health resources for both students and staff, recognizing the stress and trauma that can arise from toxic environments. UPEI should consider signing on to the Okanagan Charter: An International Charter for Health</p> <p>Promoting University and Colleges. It provides institutions with a common language, principles, and framework to become health and wellbeing-promoting campuses.</p> <p><b>Continuous Improvement</b> Commit to continuous improvement, including the yearly audit process and is open to making the necessary changes.</p>

<i><b>Recommendation</b></i>	<i><b>Additional Context</b></i>	<i><b>Rebuilding trust and safety within learning and work environments</b></i>
ii. Public awareness campaign	<ul style="list-style-type: none"> <li>• Awareness of the expected behavioural standard, relevant policies and practices, where to submit complaints, where to receive support.</li> <li>• Encourage dialogue and open discussion.</li> <li>• Strong, clear messaging on fair and inclusive environment.</li> </ul>	<p>The APAG agrees that ongoing communication, including public awareness campaigns, is crucial in transforming the working and learning environments at UPEI. Support for the topic of the campaign must also be in place (For example, a campaign around sexual violence leading people to the SV office must ensure the office has enough resources in place to respond to the increased awareness on campus.)</p> <p>We suggest a structured approach to developing and implementing a public awareness campaign. This will ensure it is comprehensive, effective, and adaptable.</p> <p>UPEI should review and renew behavioural standards and expectations for all campus community members before implementing a campaign.</p> <p>In terms of content, once key themes and messages are confirmed, awareness campaigns should be specific and targeted and developed in collaboration with subject-matter experts.</p> <p>In addition to awareness of the code of conduct and behaviour standards, there can be campaigns around prevention of and response to harassment, discrimination, and sexual violence. These campaigns can include topics such as anti-racism, unconscious bias, microaggressions, etc. to encourage a culture of reporting and speaking up against violations.</p> <p>Campaigns should be culturally appropriate; have an EDI lens; consider the challenge of safety, including psychological safety; and empower diverse groups within the community.</p>



## RECOMMENDATIONS RELATED TO IMPROVE POLICIES AND PROCESSES

<i>Recommendation</i>	<i>Additional Context</i>	<i>Rebuilding trust and safety within learning and work environments</i>
<b>Section (i): Restrict the use of NDAs</b>		
i. Restrict the use of NDAs	<ul style="list-style-type: none"> <li>Restrict use and content of NDAs and confidentiality clauses relating to allegations of harassment, discrimination, and sexual violence, unless a signatory wishes one to be used.</li> <li>The form of agreements used by the University be reviewed and any “fact of” language be removed.</li> <li>Board of Governors monitor all terminations and resignations for the foreseeable future, to ensure that NDAs are not being used to informally resolve or mediate complaints about wrongdoing.</li> </ul>	<p>The APAG appreciates that UPEI has offered to release people from their NDAs. The APAG also appreciates that no new NDAs have been signed since the interim president was appointed in December 2021. These are moves in the right direction.</p> <p>While there is a risk of misuse, the APAG also recognizes there are times when non-disclosure agreements for HR issues are appropriate. Given that PEI has new NDA legislation, UPEI should prioritize compliance. NDAs should not be used to solve problems for UPEI. If NDAs are used, they should not use ‘fact-of’ language, a stipulation prohibiting the parties from disclosing the existence of the agreement itself.</p> <p>There should be training on the new legislation in the HR Department and with the Board of Governors.</p> <p>The Board of Governors should receive periodic HR reports (annual or quarterly) with aggregate data to ensure NDAs are not being misused.</p>
<b>Section (ii): Review climate and management practices</b>		
ii. Review climate and management practices	<ul style="list-style-type: none"> <li>The University needs to review the climate and management practices in areas where concerns of bullying and harassment were mentioned most often.</li> </ul>	<p>The APAG is concerned about how this recommendation will be implemented and measured.</p> <p>The APAG recognizes the need for redactions in the <i>UPEI Review</i>. The redactions associated with this recommendation reinforce people’s concerns about a culture of secrecy.</p> <p>UPEI will need to explain clearly how they plan to approach this recommendation regarding implementation, transparency, accountability, and auditing.</p>

Recommendation	Additional Context	Rebuilding trust and safety within learning and work environments
Section (iii): Improve practices related to addressing harassment and discrimination		
<p><b>A. Create an on-campus equity, diversity, and inclusion office.</b></p>	<ul style="list-style-type: none"> <li>• Create an on-campus EDI office with additional resources dedicated to EDI awareness, support, and response. Office to include an EDI director and multiple staff members.</li> </ul>	<p>The APAG recognizes that Equity, Diversity, and Inclusion (EDI) efforts at UPEI include both the enforcement of policies and the nurturing of a culture that preempts the need for such enforcement.</p> <p>The enforcement aspect, grounded in policy and legal frameworks, provides the necessary backbone of accountability, ensuring that there are clear consequences for violations.</p> <p>However, unless managed carefully, it can create a culture of apprehension, further reinforcing some of the issues UPEI is trying to overcome.</p> <p>On the other hand, the focus on prevention, awareness, and social justice seeks to cultivate a proactive environment of understanding and respect, reducing problems and concurrently the need to lean on policies and formal processes when problems do occur.</p> <p>The challenge and goal, therefore, lie in harmonizing these two aspects; and that requires a much larger team than currently exists.</p> <p>It also requires a thoughtful balance, where enforcement is seen not as an end in itself but as one part of a broader strategy aimed at fostering a genuinely inclusive culture.</p> <p>By promoting restorative practices and transparent communication, and by investing in comprehensive training, the APAG believes UPEI has the opportunity to create a synergy between these dimensions of EDI work, leveraging the strengths of each to build a more equitable and respectful community.</p> <p>While we provide our guidance, we encourage ongoing reviews of promising initiatives in other institutions and solid engagement with the folks working in the EDI office currently to have a good understanding of the gaps and opportunities.</p>

Recommendation	Additional Context	Rebuilding trust and safety within learning and work environments
Section (iii): Improve practices related to addressing harassment and discrimination		
<p><b>A. Create an on-campus equity, diversity, and inclusion office. [cont.]</b></p>		<p><b>Purpose and Roles</b> Establish the purpose of the EDI office in clear terms with delineating roles. Ensure that these roles are distinct from one another, have well-defined responsibilities, and connect to existing gaps and needs on campus.</p> <p><b>Ensure Autonomy and Authority</b> The action plan must clearly articulate how the EDI office will have the autonomy and authority to address issues without conflicts of interest, including the power to hold all levels of the institution accountable (e.g., implementing the Harassment and Discrimination Policy).</p> <p><b>Provide Adequate and Secure Resources</b> While the EDI office is a natural place to house special projects, it requires ample secure core funding to ensure stability, including job security for the team.</p> <p><b>Education and Training</b> We see the EDI office as having a key role in developing (or procuring) and delivering mandatory training programs recommended in the <i>UPEI Review</i>. These programs should be ongoing and evolve based on feedback and the latest research in the field.</p> <p>For broader culture change to happen, we also see the EDI office supporting individual departments and faculties in their own EDI efforts.</p> <p><b>Accessibility and Support</b> As noted in the Review, being especially focused on ensuring the EDI office is accessible, with support tailored to various and intersecting community needs, including people who are Indigenous, international students, BIPOC, 2SLGBTQ+, and people with disabilities.</p> <p><b>Staffing and Human Resources</b> There must be a diverse staff with the necessary skills and experience in EDI, including the dual aspects we noted above. Establish hiring criteria that prioritize competence and potential, ensuring that the screening process and credential requirements do not inadvertently exclude candidates who could bring valuable perspectives and skills despite</p>

Recommendation	Additional Context	Rebuilding trust and safety within learning and work environments
Section (iii): Improve practices related to addressing harassment and discrimination		
<p><b>A. Create an on-campus equity, diversity, and inclusion office. [cont.]</b></p>		<p>non-traditional backgrounds or pathways. Consider involving equity-seeking organizations in the hiring process.</p> <p><b>Community Representation</b> The APAG would like to see a representative and active structure where each department/ faculty/union has an EDI liaison to ensure issues are heard and addressed by the EDI office.</p> <p><b>Cultural Competence and Sensitivity</b> Staff members must not only understand, but be experienced in addressing issues like colonization, settler colonialism, anti-oppression, systemic racism, and trauma-informed approaches to effectively supporting the community.</p> <p><b>Conflict Management and Resolution</b> Build capacity for informal resolution methods that are less adversarial and more conducive to maintaining community relationships.</p> <p><b>Communication and Reporting</b> Set up regular reporting mechanisms to the President, the Board of Governors, Senate and the campus community, ensuring that the EDI office's activities are visible and its guidance is both considered at the highest levels and shared widely.</p> <p><b>Student Involvement and Empowerment</b> Involve students in the EDI office's work. This will help better understand and address their needs and to foster a campus culture that values student voices, including peer support training.</p> <p><b>Change Management and Data Analysis</b> Throughout these recommendations, we advise UPEI to formalize its EDI initiatives' data gathering, analysis, reporting and change management processes. This continuous development approach allows for more nuanced and targeted strategies, as decisions are based on the campus's evolving needs and dynamics.</p>

Recommendation	Additional Context	Rebuilding trust and safety within learning and work environments
Section (iii): Improve practices related to addressing harassment and discrimination		
<b>B. Create a new harassment and discrimination policy</b>	<ul style="list-style-type: none"> <li>• Replace the Fair Treatment with a comprehensive harassment and discrimination policy that covers all University community members and reflects the updated structure of an EDI office for addressing complaints as noted above.</li> <li>• Revised policy must conform with Workplace Harassment Regulations to the Provincial Occupational Health and Safety Act and Employment Standards Act.</li> <li>• New policy should contain a carve-out for matters of sexual violence (to be addressed under a revised Sexual Violence Policy) recognizing instances where the policies cannot be separated and should advise how to proceed in such cases.</li> <li>• Revised policy should capture conduct (including off-campus conduct that has a nexus to, or material negative impact on, the University).</li> <li>• Revised policy should move the time limit for bringing forward a complaint from six months to at least one year.</li> <li>• Revised policy should have definitions for key terms that are consistent with legislation.</li> <li>• Revised policy should clearly identify decision-makers who would hold responsibility for key procedural decisions under the policy; and an alternate decision maker if there is a conflict.</li> <li>• Revised policy should acknowledge that harassment and discrimination can be systemic in nature and provide a mechanism for the University to investigate or make inquiries into such issues with or without a formal complaint.</li> </ul>	<p>The APAG agrees with the recommendations of the <i>UPEI Review</i>. We focused on several areas to provide more feedback to UPEI in creating the harassment and discrimination policy.</p> <p><b>Who should develop the new policy?</b> An expert committee of internal and external experts should draft the new policy with an anti-oppressive lens. This work policy must be trauma-informed and healing-centered, as well as meeting regulatory body requirements. There should be a validation process (including student feedback) integrated into the policy development phase.</p> <p>As the <i>UPEI Review</i> noted, this policy will need to align with the Sexual Violence Policy to make clear when the SV policy is in place and times when the policies can't be separated.</p> <p>Everyone follows the same policies, and this also includes external contractors. Policy development needs to consider how Student Work Placements can be included.</p> <p>The policy should be written in plain language with clear definitions of commonly used terms and culturally appropriate behaviour. It should focus on the survivor's needs, including providing multiple pathways for resolution. The policy should include who is and who is not protected by it. People who do not fall under the policy's protections should be directed to off-campus supports and services.</p> <p>The policy should include clear positions on consensual relationships between faculty/staff and students; and employ mechanisms for addressing community harm. It should include a range of options for repairing harm and ensuring accountability.</p> <p><b>Reporting</b> While good policy development is key, the APAG members are clear that people who report need to feel safe, heard, and responded to respectfully and effectively.</p> <p>Not only should the time frame for reporting be at least one year, the policy should recognize the temporary nature of some people's time at UPEI. Students should be able to report for a set duration after leaving the University.</p>

Recommendation	Additional Context	Rebuilding trust and safety within learning and work environments
Section (iii): Improve practices related to addressing harassment and discrimination		
<b>B. Create a new harassment and discrimination policy [cont.]</b>		<p>A good trauma-informed approach to reporting is ensuring a victim doesn't have to re-narrate their experience to different groups.</p> <p><b>Implementation</b>  The APAG would like UPEI to invest in complaint management or anti-harassment software. This allows for efficient and effective data collection (including third-party complaints), monitoring, and analysis.</p> <p>Once developed, an initial education campaign will be required. Then, training on this policy to be included in onboarding for staff and faculty, the Senate and the Board of Governors. For students, policy education should be included in orientation with yearly reinforcement (e.g., similar to a mandatory Academic Integrity course and badge).</p> <p>Provide training on academic freedom and freedom of expression, ensuring faculty members, staff, administrators, and students understand its scope and limitations. (N.B.: while there is consensus on this point, there was not 100% agreement by the Advisory Group).</p> <p>Support for putting the policy into practice can include flow charts, templates, and simple guides that will encourage understanding and implementation by the campus community.</p>
<b>C. Use a variety of external investigators</b>	<ul style="list-style-type: none"> <li>University should use a wide variety of external investigators to ensure procedurally fair investigations or provide parties with an ability to request an alternative external investigator.</li> </ul>	<p><b>Investigations</b>  The APAG wants to see public procurement of diverse investigators with a range of expertise, including harassment, discrimination, violence etc. UPEI should have a standing list of investigators (updated every 3–5 years) and not rely on any one firm to provide investigators. This will both provide a range of options and avoid conflicts of interest.</p> <p>Due to time constraints, the APAG didn't delve deeply into how outcomes should be decided, but agreed that options that include external decision-making similar to the Human Rights Commission process and volunteers should be considered.</p>

Recommendation	Additional Context	Rebuilding trust and safety within learning and work environments
Section (iv) Improve practices related to addressing sexual violence		
<b>A. Additional resources</b>	<ul style="list-style-type: none"> <li>• In addition to an EDI Office, a centralized office on campus responsible for administering the Sexual Violence Policy with the support of more resources/team members.</li> <li>• Support is needed for awareness and education initiatives re: sexual violence on campus. Separate roles for sexual violence prevention and sexual violence response are needed.</li> </ul>	<p>We agree with the <i>UPEI Review</i> recommendations in this section. Additionally, the APAG suggests that the SVPRO should have ongoing evaluations and surveys to ensure they are being as responsive as possible to people's needs.</p> <p>We strongly agree that there should be separate roles for prevention and response, including additional resources. In addition to awareness campaigns, the APAG sees a role for a series of guides or simple flow charts to help people on campus navigate responding to disclosures of sexual violence.</p> <p>The APAG suggests determining if existing resources such as the UPEI SAFE App (campus app) or Moodle can be leveraged to provide additional support and resources to students. Provide folks with opportunities for experiential learning (e.g., practice using the Blue Emergency poles during Orientation Week).</p> <p>UPEI can build and improve relationships with organizations working on similar issues, like the PEI Rape and Sexual Assault Centre, the RISE Program, and Victim Services.</p> <p>Other supports UPEI can adopt include a Safe Walk program to help ensure student and staff safety on campus.</p> <p>We would like to see additional support for people based on their intersecting identities, including BIPOC and 2SLGBTQ+ folks. For example, Indigenous people should be advised they can have an Indigenous advocate or Elder involved to support them and assist in the process. A list of Indigenous resources and support organizations should be made available.</p>
<b>B. Education and awareness</b>	<ul style="list-style-type: none"> <li>• In addition to mandatory training on consent for all first-year students, training should include clarity on how to make a disclosure or report sexual violence.</li> <li>• Mandatory training be extended to faculty and staff, and within onboarding for new employees.</li> </ul>	<p>There is a strong need for ongoing training around issues of sexual violence. We believe everyone employed by UPEI (staff, faculty, administration, teaching assistants, etc.) and the Board of Governors and Senate should be included in mandatory training requirements.</p> <p>Any training programs should include pre-tests and ongoing evaluations to benchmark initial knowledge levels, guide content customization, monitor progress, and help evaluate the effectiveness of the training.</p>



Recommendation	Additional Context	Rebuilding trust and safety within learning and work environments
Section (iv) Improve practices related to addressing sexual violence		
<b>B. Education and awareness [cont.]</b>		<p>We also recognize that increasing training and awareness translates into more disclosures. Having enough support and resources will need to increase as a result.</p> <p>The APAG would like to see clear definitions, including a distinction between gender-based violence and sexual harassment/sexual violence, with training to include gender-based violence.</p> <p>The mandatory course offered to students is a good step. The APAG encourages UPEI to make the course mandatory upon registration rather than graduation. This will align with pre-move-in training modules for students in residence that include consent. It will help ensure students receive the critical training upon beginning their time at UPEI, rather than potentially as it wraps up.</p> <p>Use a variety of tools, including Peer Support training for students and employing the UPEI Campus Student App and Moodle as places for straightforward guides for sexual violence prevention and what to do in response to sexual violence.</p> <p>The APAG would like UPEI to v programs like the Enhanced Assess, Acknowledge, Act (EAAA) program for women. It is evidence-based and been shown to reduce the sexual violence that women students experience by 50%.</p> <p><b>Suggestions for mandatory training for employees</b>  Prioritize sexual assault training for all employees (and student leaders) who work directly with students.</p> <p>Align training with other staff priorities as research and grant funding often requires EDI considerations/training.</p> <p>Ensure staff and faculty have the support they need to access training. This includes a stipend for sessionals who are only paid for their course time and ample resources to ensure staff training doesn't impact students' access to services.</p>

<i>Recommendation</i>	<i>Additional Context</i>	<i>Rebuilding trust and safety within learning and work environments</i>
<b>Section (iv) Improve practices related to addressing sexual violence</b>		
<b>C. Coordinated response team approach</b>	<ul style="list-style-type: none"> <li>Sexual Violence Policy should provide for a coordinated response team approach to support the SVPRO in decisions related to disclosures and reports of sexual violence.</li> <li>The response team can be comprised of University members with the requisite expertise. This will provide support to the SVPRO and create accountability in decision-making which has been noted to be lacking.</li> </ul>	<p>The APAG is pleased to see a coordinated response team being piloted at UPEI.</p> <p>We want to ensure there is a reliable reporting system with data tracking and ongoing evaluation of this new project. This is also an area where good communications and training will be important. Folks on campus need to know more about this team, including when and how they are used; the process for determining who is involved; and how to refer cases to the team.</p>
<b>D. Physical location of SVPRO</b>	<ul style="list-style-type: none"> <li>Improve the location of the SVPRO Office to a more accessible and visible space for students, while ensuring confidentiality.</li> </ul>	<p>The location of the SVPRO is a fine balance of accessibility and privacy. The location should have enough other traffic and services to provide cover for folks accessing the SVPRO office.</p>
<b>E. Increased support for parties</b>	<ul style="list-style-type: none"> <li>Policy should be updated to reflect how respondents to sexual violence allegations will be adequately supported through the process.</li> <li>This includes strengthening support for parties at the end of an investigation process. Advance notice of the delivery of the investigation report be given to the parties; reports could be shared with the SVPRO and the respondent's dedicated support.</li> </ul>	<p>Updating policy to offer stronger support for complainants is a key step for a fair and comprehensive process. We agree that all parties should be given advance notice before the delivery of the investigation report, providing adequate time to prepare for the next steps.</p> <p>Sharing the reports with the SVPRO and the respondent's dedicated support person can ensure that both the complainant and the respondent are informed and feel supported throughout the process.</p> <p>More resources are needed to support all parties, including when no formal report is filed. There is a need for clear protocols on police involvement and a differentiated approach that accounts for the diverse experiences of all parties, including Indigenous, 2SLGTQ+ folks, BIPOC and international students, who can face unique and more harsh consequences, such as visa issues.</p> <p>Strengthening this support could include enhancing restorative justice practices and developing targeted interventions for those who do not receive adequate support, ensuring that policies are not merely procedural but effective and empathetic.</p> <p>It is also important that the university ensure that those in student affairs and others involved in these processes have the necessary training and experience to handle these situations effectively.</p>

Recommendation	Additional Context	Rebuilding trust and safety within learning and work environments
<b>Section (v) Revise the Sexual Violence Policy</b>		
<b>A. Structure of the policy</b>	<ul style="list-style-type: none"> <li>Sections of the policy need to be updated to keep in line with evolving practices.</li> <li>There should be one standalone policy that applies to students, staff, and faculty. One policy can map out processes and decision streams depending on the status of the respondent (similar to policies at McMaster and Dalhousie).</li> </ul>	<p>The Sexual Violence Policy is being drafted, and the APAG expressed frustration that they were asked to provide feedback and guidance on this recommendation without being able to review the draft policy.</p> <p>Without reviewing the draft, the APAG advises there should be a validation process (including student feedback) integrated into the policy development phase. We advise that UPEI engage external subject matter experts to review it. For example (but not limited to), the Provincial Sexual Violence Prevention and Response Coordinator, the Advisory Council on the Status of Women, the PEI Rape and Sexual Assault Centre, the Department of Justice and Public Safety, Family Violence Prevention Services, BIPOC USHR, Rise Program (Community Legal Information), PEERS Alliance, PEI Transgender Network, Native Council of PEI, the Mi'kmaq Confederacy, Aboriginal Women's Association, Human Rights Commission, and Pathways to Thrive (Women's Network PEI).</p> <p>We also suggest doing an environmental scan to understand what best practices are emerging from other academic institutions (both in policy development and implementation).</p> <p>Campus sexual violence policies exist to provide a clear framework for preventing, addressing, and responding to sexual violence, ensuring a safe and supportive environment for all students, faculty, and staff.</p> <p>UPEI, through this policy, needs to prioritize the survivor's choice and control over their situation, providing them with full information about reporting options and potential outcomes. At the same time, they must adhere to legal obligations to report criminal acts, especially when there is an ongoing risk to the individual or the community. This delicate balance requires clear communication, compassionate support, and an understanding of both legal responsibilities and the survivor's rights and needs.</p> <p>As a result, navigating the interaction between campus sexual violence policies and the criminal justice system requires a balance of respecting the legal process while recognizing</p>

Recommendation	Additional Context	Rebuilding trust and safety within learning and work environments
Section (v) Revise the Sexual Violence Policy		
A. Structure of the policy [cont.]		<p>that most survivors choose not to report or pursue a criminal complaint. Most often survivors seek support and accommodations, making it essential for UPEI to focus on creating a responsive and empathetic system that prioritizes their well-being and informed choices while still fulfilling legal and ethical obligations. Finally, at this point, the police do not accept third-party reports, while we believe the UPEI SV policy should allow for this.</p> <p>The APAG agrees there should be one standalone policy with various streams. The policy should be structured based on Universal Design for Learning principles. The policy (and procedures) should include definitions and be written in plain language.</p> <p>This is especially important for International students new to English and people with disabilities. It should be understandable and accessible using various tools like flowcharts, guides, visual aids, and templates to ensure accessibility.</p> <p>When it comes to putting the policy into practice, like with the Harassment and Discrimination Policy, there is a need for training and awareness, including in culturally sensitive behaviour.</p>
B. Definitions and scope	<ul style="list-style-type: none"> <li>• Definition of ‘sexual harassment’ needs to be in compliance with provincial legislation (Employment Standards Act, OH&amp;S Act). ‘Community members’ should be more broadly defined and the policy’s jurisdictions better explained.</li> <li>• The new policy should clarify and strengthen its application to off-campus conduct.</li> <li>• The policy should be more flexible in relation to complaint processes when the respondent ceases to be a University member to permit continuation of the process or steps to safeguard the community.</li> <li>• Keeping with current trends, the University may wish to consider implementing a prohibition on consensual romantic/or sexual relationships between faculty and students where there is a form of supervisory or reporting relationship.</li> </ul>	<p>In addition to the <i>UPEI Review</i> recommendations, the new policy should be survivor-led.</p> <p>Campus sexual violence policies should clearly define the types of sexual violence covered by the policy, including sexual violence, sexual harassment, gender-based violence, stalking, exploitation, sharing of intimate images, etc. and the procedures for reporting and responding to such incidents. These definitions and procedures should be aligned with legal standards and tailored to the campus environment’s specific context.</p> <p>In crafting UPEI’s sexual violence policy, there should be specific considerations for Indigenous people. The higher incidence of sexual violence among Indigenous communities, particularly among women, warrants a policy that is both sensitive to and inclusive of Indigenous rights and cultural contexts.</p> <p>It should acknowledge the unique challenges Indigenous people face, including systemic barriers and the pervasive effects of racism and colonization, which contribute to a reluctance to report incidents.</p>

Recommendation	Additional Context	Rebuilding trust and safety within learning and work environments
<b>Section (v) Revise the Sexual Violence Policy</b>		
<b>B. Definitions and scope [cont.]</b>		<p>To address these challenges, the policy must guarantee the option for Indigenous individuals to be supported by someone from their community during the reporting process—a support person who could be a friend, relative, or designated Indigenous support worker. This provision would not only respect cultural practices but also foster an environment where Indigenous voices are heard and believed. The policy should actively work to dismantle the mistrust in reporting mechanisms.</p> <p>The policy should be intersectional in applications of consequences and resolutions. Without compromising safety, there should be space for education and learning.</p> <p>Additionally, the policy needs to recognize the disparities in how disciplinary actions are meted out, particularly towards Black, Indigenous, and People of Colour (BIPOC). BIPOC often face more severe repercussions, a pattern that can stem from systemic biases rather than equitable treatment. This is especially true for those who are not Canadian citizens or Permanent Residents, who may face deportation as a consequence.</p>
<b>C. Preliminary issues</b>	<p>The policy should:</p> <ul style="list-style-type: none"> <li>• allow for interim measures in the absence of a formal complaint in a manner which ensures procedural fairness to the individual against whom the allegations are being made</li> <li>• be explicit that parties be given written notice of interim measures and practice to review the interim measures</li> <li>• clearly state factors to consider in conducting an initial assessment of the complaint</li> <li>• allow for third party reports and anonymous reporting</li> <li>• provide processes for addressing multiple disclosures about the same person (this was noted as a problem that repeat offenders were remaining)</li> </ul>	<p>Addressing sexual violence on campus requires an immediate and unwavering commitment to the safety and support of survivors, regardless if they make a formal report.</p> <p>Cases of sexual harassment/assault in student residences present unique challenges, particularly in terms of confidentiality and personal safety, as victims and alleged perpetrators often share the same living spaces.</p> <p>Current policies sometimes leave residence staff feeling powerless when it comes to taking effective action during investigations. There is a noticeable disparity in the powers granted to residence staff for handling various infractions. This imbalance not only hinders the effective management of serious incidents like sexual harassment and assault but also creates negative optics regarding the institution's commitment to student safety and well-being. When developing the new policy, it is important to specifically address incidents of sexual harassment/assault within the residence environment.</p> <p>The Campus Security team should be trained to respond to harassment and assault calls.</p>

<i>Recommendation</i>	<i>Additional Context</i>	<i>Rebuilding trust and safety within learning and work environments</i>
<b>Section (v) Revise the Sexual Violence Policy</b>		
<b>C. Preliminary issues [cont.]</b>	<p>within the University community despite multiple complaints)</p> <ul style="list-style-type: none"> <li>• address conflicts of interest by acknowledging that there may situations in which the person who normally has responsibility for some aspect of the policy should not be involved due to a conflict and provide for alternatives</li> <li>• limit the terminology throughout to ‘report’ and ‘disclosure’.</li> </ul>	
<b>D. Informal resolutions</b>	<ul style="list-style-type: none"> <li>• Rename this section to ‘alternative resolutions’ to provide restorative practices, healing or peacemaking circles, transformative justice, etc. —but it should not include mediation.</li> <li>• The policy should contain certain preconditions or criteria before a report of sexual violence is considered suitable for alternative resolution.</li> </ul>	<p>In a survivor-led policy, there must be a distinction between disclosure and a report because they serve different needs and outcomes for survivors.</p> <p>A disclosure is a confidential sharing of an experience of sexual violence, primarily for the purpose of accessing support and resources without triggering a formal investigative process. This is for survivors seeking a safe space to be heard and to receive care without the pressure of engaging in a formal process.</p> <p>On the other hand, a report is a formal complaint that activates a response, potentially leading to an investigation and disciplinary actions. This process is integral to upholding perpetrators’ accountability and the community’s safety but is also more public and structured.</p> <p>The clarity between these two paths ensures survivors have control over their journey towards healing and justice, aligning their chosen course of action with their personal needs and expectations for resolution.</p>
<b>E. Investigations</b>	<p>The policy should:</p> <ul style="list-style-type: none"> <li>• require investigators to be culturally competent and trained in a trauma-informed approach to investigations</li> <li>• incorporate language that prevents investigators from asking complainants irrelevant questions about their sexual history</li> </ul>	<p>In addition to the <i>UPEI Review</i> Recommendations, the APAG would like the policy to provide clear guidance for how to determine when the university should independently report to the police. This should include consistent risk assessment tools.</p>

<i>Recommendation</i>	<i>Additional Context</i>	<i>Rebuilding trust and safety within learning and work environments</i>
<b>Section (v) Revise the Sexual Violence Policy</b>		
<b>E. Investigations [cont.]</b>	<ul style="list-style-type: none"> <li>where a University process is suspended pending a criminal investigation, the policy should require the respondent to update the University of any conditions of release or related orders, or disposition of charges.</li> </ul>	<p>The policy should establish internal processes for handling sexual violence cases that can run parallel to criminal justice proceedings. However, they should be distinct and not reliant on the outcome of the other.</p> <p>We would like to see policies and processes to keep the Sexual Violence coordinator abreast of the progress of the investigation.</p> <p>Investigators should have expertise in this type of investigation and be culturally competent and trained in trauma-informed approaches to investigations.</p> <p>In all aspects of this process, there should be support for respondents who are affiliated with UPEI as well, including a support person</p>
<b>F. Appeals</b>	<p>The policy should:</p> <ul style="list-style-type: none"> <li>allow parties to appeal findings on the ground of ‘new evidence that could not have been reasonably presented earlier.’</li> <li>provide that the appeal panel include an independent third-party member.</li> <li>require that the appeal panel provide written reasons for their decisions.</li> </ul>	<p>The UPEI sexual violence policy should incorporate appeal processes that offer survivors clear, accessible pathways that prioritize confidentiality and procedural fairness.</p> <p>These processes must be done in a timely fashion, involve independent third-party review, and provide protection against retaliation. There should be consistent support services throughout for both survivors and respondents. Feedback on the process should be integrated in policy reviews as well.</p>
<b>G. Data and reporting</b>	<ul style="list-style-type: none"> <li>The policy should provide for fuller collection of data and statistics, specifically laying out what data is collected, how the data is collected, who it is shared with, and for what purposes.</li> </ul>	<p>As with the Harassment and Discrimination policy, the APAG wants to see UPEI use an electronic reporting tool to help manage data collection, monitoring, and analysis.</p>



## APPENDIX 3 – RESOURCES AND SUPPORTS FOR THE CAMPUS COMMUNITY

UPEI is committed to providing resources and supports to members of our community. This includes additional supports needed as a result of the release of the *UPEI Review* in June 2023.

### *UPEI Student Affairs and International Student Office*

UPEI has a number of resources for students through UPEI Student Affairs, including academic advising and personal counselling (studentserv@upei.ca), and the International Student Office (irostu@upei.ca).

### *Sexual Violence Prevention and Response Office*

UPEI's Sexual Violence Prevention and Response Office (SVPRO) is a safe and confidential space for students, staff, and faculty who have experienced sexual violence, or know someone who has, to obtain support. Call 902-620-5090 or email sv-pro@upei.ca for support and/or to learn about your options and connect with trauma-informed services.

UPEI created the Sexual Violence Prevention and Response Office in 2018. The office was created in response to the development of the University's Sexual Violence Policy. The office administers the Sexual Violence Policy. It also leads education and prevention training and activities on campus related to sexual violence and provides sexual violence response services to faculty, students, and staff. The Office prepares annual reports regarding its activities, including the number of incidents of sexual violence disclosed and/or reported to the SVPRO. In 2022, the reporting structure for SVPRO was changed to report into the Equity, Diversity, and Inclusion Office.

### *Equity, Diversity, and Inclusion Office*

UPEI's Equity, Diversity, and Inclusion Office (EDI Office) was developed in 2019. The EDI Office is responsible for supporting the strategic direction towards advancing equity, diversity, and inclusion within the University community. It is also responsible for monitoring the progress of the UPEI Equity, Diversity, and Inclusion Strategy, and provides leadership to

the University to ensure equity, diversity, inclusion, and human rights obligations and goals are being met. The Office also ensures that training and resources are available to faculty, staff, and students at UPEI. Learn more about the UPEI EDI Office at [upei.ca/equity-diversity-and-inclusion](https://upei.ca/equity-diversity-and-inclusion) or email [equity@upei.ca](mailto:equity@upei.ca).

### *New third-party counselling and disclosure support for UPEI employees*

With the release of the *UPEI Review*, the University has coordinated two new confidential processes to support faculty and staff who have experienced harm from harassment, sexual violence, or discrimination at UPEI.

### *Confidential third-party personal counselling*

The UPEI Health and Wellness Centre has engaged a psychologist to meet individually with faculty and staff, by appointment. Employees may email Caylin Jenkins at [cbjenkins@upei.ca](mailto:cbjenkins@upei.ca), indicating "Appointment required" in the subject line. Caylin will coordinate with the psychologist and confirm the time and location of the appointment with the employee.

### *Making a confidential disclosure*

People have asked about the process for making disclosures of incidents of harassment or discrimination by senior executive members of the University. The University has established an independent third-party process to address any such issues with Resonance Inc., a multidisciplinary human resources firm, based in Saint John, NB, that specializes in workplace assessments. The contact person at Resonance is Trisha Perry, who may be reached at [tperry@resonanceinc.ca](mailto:tperry@resonanceinc.ca) or (506)799-0412.

### *Employee Assistance*

UPEI faculty and staff can access resources on the HR site on myUPEI while eligible employees can call the Employee Assistance Program at 1-800-387-4765 for support.

## GLOSSARY

**Anti-racism:** is the active process of identifying and eliminating racism by changing systems, organizational structures, policies and practices and attitudes, so that power is redistributed and shared equitably.

### **Equity, diversity, and inclusion (EDI)**

**Equity:** is a principle of fairness in treatment, access to opportunity, and advancement for all members of the University community. It requires acknowledging that treating people equally does not always produce fair outcomes, and there is a need to eliminate systemic barriers and biases that have played a role in impeding the full participation of underrepresented or disadvantaged groups.

**Diversity:** means differences between people. This can relate to the groups protected by human rights legislation, and, also within the University community, can refer to differences in beliefs, disciplines, education, and values. Understanding diversity requires recognizing that people have multiple and intersecting identities.

**Inclusion:** is the creation of an experience where everyone on campus can feel welcomed, respected, and valued. Inclusion requires recognizing that some groups have been historically and/or structurally disadvantaged and meaningfully engaging with those groups.

**Gender-based violence:** is any act of violence (physical, emotional, financial, sexual) based on a person's gender, gender expression, gender identity or perceived gender.

**Governance:** in relation to UPEI, is based on a bi-cameral model:

- The Board of Governors, as vested by the University Act, holds the responsibilities of conduct, management, administration and control

of the property, revenue, business, and affairs of the University, and delegates the daily management of the University to the President and Vice-Chancellor and Senior Administration, and

- The Senate is responsible for the establishment of the University's academic policies and programs and for making recommendations to the Board of Governors on the University's academic administration and development.

**Intersectionality:** is the complex, cumulative way in which the effects of multiple forms of discrimination (such as racism, sexism, and classism) combine, overlap, or intersect especially in the experiences of marginalized individuals or groups.

**Procedural fairness:** a legal principle that is focused on the process through which formal decisions are made (i.e., investigations). It safeguards the rights of the participants in the process including impartiality and participation rights.

**Psychological safety:** is the absence of interpersonal fear. It is the belief that you will not be punished or humiliated for speaking up with ideas, questions, concerns, or mistakes.

**Sexual violence:** means any act targeting a person's sexuality, gender identity or gender expression, whether the act is physical or psychological in nature, which is committed, threatened or attempted against a person without that person's consent.

**Trauma-informed:** is an approach that understands and considers the pervasive nature of trauma and seeks to accommodate its effects on a person's physical, emotional, cognitive, and neurological systems to avoid re-traumatization.





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