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1. Efforts to Address Systemic Barriers More Broadly within the Institution 

Important Note

(Once you have read the statement below, click the radio button beside it.)

Please note that the information you enter in your report is only saved when clicking on the "Save and Next" button at the bottom of the page. Using the browser navigation buttons or the "Continue Later" button at the bottom of the page will not save the information entered on the page. If after clicking "Save and Next" you see a "Page has errors" message in red, near the top of the page, it means that at least one field is missing information. In such an instance, the empty field will have the words "Answer is incomplete" underneath it, in red.

This report includes mandatory reporting on 1) the CRCP institutional equity, diversity and inclusion action plan (IEDIAP) and 2) the \$50,000 EDI Stipend.

Your institution must submit the report by the deadline date indicated by the program, and must cover the reporting period identified by the program.

Institutions are required to post the most up to date version of their EDI action plan on their [public accountability web pages](#).

Each year, institutions must publicly post a copy of this report to their [public accountability web pages](#) within 7 working days after the deadline for submitting the report to TIPS. TIPS will review the report each year; in addition, the annual report(s) will be provided to the external EDI Review Committee, when it is convened every few years, to evaluate the progress made in bolstering EDI at the respective institution and to provide context for future iterations of the EDI action plan. Ensure that you remove all numbers less than 5 from both the plan and the report prior to posting on your website in cases where your report includes the representation of individuals from underrepresented groups among your chairholders, as well as any other identifying information. This is a requirement of the Privacy Act.

All sections of the form are mandatory (unless otherwise noted).

Contact information

Please complete the fields below.

Name of Institution:

University of Prince Edward Island

Contact Name:

Dr. Greg Naterer

Position Title:

Vice-President, Academic and Research

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Institutional Telephone Number:

902.566.0561

The link for the EDI progress report and EDI Stipend report:

<https://www.upei.ca/research/research-chairs>

Does your institution have an EDI Action Plan for the CRCP?

Yes

PART A: EDI Action Plan - Reporting on Key Objectives Analyses, Systemic Barriers, Objectives and Indicators

Date of most recent plan (e.g. latest revision of the public plan):

08/31/2023

Rating given to the action plan in most recent review process:

Satisfies

Name of vice-president level representative responsible for ensuring the implementation of the plan:

Dr. Greg Naterer

In developing their action plans, institutions were required to conduct: 1) an employment systems review; 2) a comparative review; and 3) an environmental scan (see program requirements [here](#)). These assessments were required in order to identify the specific systemic barriers and/or challenges that are faced by individuals from underrepresented groups (e.g. women and gender minorities, persons with disabilities, Indigenous Peoples and racialized individuals, 2SLGBTQIA++ individuals) at the respective institution; institutions were then required to develop key S.M.A.R.T. (specific, measurable, aligned with the wanted outcome, realistic and timely) objectives and actions to address them.

Indicate what your institution's key EDI objectives are (up to six) as outlined in the most recent version of your action plan, as well as the systemic barriers/challenges identified that these objectives must address. Please note that objectives should be S.M.A.R.T. and include a measurement strategy. List the corresponding actions and indicators (as indicated in your institutional EDI action plan) for each objective, and outline: a) what progress has been made during the reporting period; b) the main actions were undertaken (up to six) and how they have progressed; c) the data gathered; and d) indicators used to assess the outcomes and impacts of the actions. Please note that indicators can be both quantitative and qualitative and should be specific. Outline next steps and use the contextual information box to provide any additional information (e.g., course correction, obstacles, lessons learned, etc.) for each objective. If your institution has not yet prepared or received a formal evaluation of its CRCP EDI action plan (institutions having fewer than five Chairs) then section A is optional.

Key Objective 1

Brief description of S.M.A.R.T. (specific, measurable, aligned with the wanted outcome, realistic and timely) Key Objective 1:

Ensure there is consistent EDI measures and messaging at every level of UPEI's operations.

Systemic barriers -

Please provide a high-level description of the systemic barriers (e.g., summarize what the barriers are and how they were identified):

One theme identified through campus wide consultations held with over 400 people, was that some members of the four designated groups (FDGs) are not fully experiencing equity, diversity, and inclusion in their UPEI experience. The University lacked cohesion in how to tackle the problem. One of the barriers to systemic change was a lack of a proper foundation on which the University could meaningfully work towards inclusion.

Corresponding actions undertaken/to be undertaken to address the barriers:

	If you have no action to report, please type 'N/A' in the answer field.	Progress to date
Corresponding action 1	Maintaining a university wide Equity, Diversity, and Inclusion Steering Committee, with meetings, and updated membership.	Completed
Corresponding action 2	Made improvements to the Equity, Diversity, and Inclusion intranet page (myUPEI) for sharing of internal resources and training.	Completed
Corresponding action 3	Continued promotion of the UPEI Equity, Diversity, and Inclusion Strategy.	Completed
Corresponding action 4	Development of the first progress reporting on the university wide Equity, Diversity, and Inclusion Strategy	In progress
Corresponding action 5	Cross referencing UPEI's Equity, Diversity, and Inclusion Strategy across other processes, procedures, and strategies.	Completed
Corresponding action 6	NA	Not yet started

Data gathered and Indicator(s) - can be both qualitative and quantitative:

EDI Steering Committee membership has been changed and updated in this reporting period. Continued monitoring of site statistics of the myUPEI EDI page. The University was in the process of developing the first progress report on the institution wide EDI Strategy, and thus in this period received reporting from Deans and Directors on progress made on EDI in all areas of the University. EDI Steering Committee also provides feedback and guidance back to the EDI Office throughout this period. The internal myUPEI EDI page has some ability to track access to the site.

Outcomes and Impacts made during the reporting period:

The EDI Strategy Progress Reporting, was not finalized, but the draft version showed that: 8% of activities were in the planning phase, 43% of actions were in progress, and 49% of actions were either complete or ongoing. Through the entire action plan a total of 226 EDI related actions were completed and formally reported on through the process. While there are challenges to tracking access to our internal site, our best estimate is that approximately 200 people accessed resources, accessing over 1000 pages of information. Notably, our "Resources for Researchers" page which collects EDI related information, training, resources, and best practices specifically intended for researchers continues to be our second most popular page, with approximately 75 researchers accessing over 250 resources in the reporting period.

Challenges encountered during the reporting period:

The EDI Officer was on parental leave September 2021 - March 2022. Progress slowed while she was away from the Office. This delayed the implementation of some initiatives. UPEI had hoped to release our EDI Strategy Progress Report in this period. Working with partners on the adoption of the this progress reporting was considerably slower than anticipated.

Next Steps (indicate specific dates/timelines):

UPEI EDI Strategy Progress Report to be passed by Board of Governors and Senate, and publicly shared with the campus community - February 2023 Continue to add resources and improve the myUPEI EDI page - ongoing project, no end date planned.

Was funding from the CRCP EDI stipend used for this key objective?

Yes

If the answer to the previous question was 'yes', indicate how much of the funding was spent on this key objective and specifically what the funds were spent on.

If the answer to the previous question was 'yes', indicate how much of the funding was spent on this key objective:

5000

If an amount was entered in the previous question, indicate specifically what the funds were spent on.

The funds were used for the salary of the Equity, Diversity, and Inclusion in Employment Systems Advisor who made improvements to the myUPEI EDI page as part of this objective.

EDI Stipend Impact Rating

Please rate the extent of the impact the EDI Stipend has had on your institution in meeting this key objective:

Moderate impact (the EDI Stipend had moderate impact on achieving progress)

Indicate in the table below any leveraged cash or in-kind contributions provided by the institution

Leveraged cash or in-kind contributions from your institution (if applicable):

	Amount \$	Source / Type (cash or in-kind)
1	5000	in-kind

Do you have other key objectives to add?

Yes

Key Objective 2

Brief description of S.M.A.R.T. (specific, measurable, aligned with the wanted outcome, realistic and timely) Key Objective 2:

Address systemic and institutional barriers experienced by women, visible minorities, persons with disabilities, and/or Indigenous persons embedded into recruitment and hiring of Canada Research Chairs.

Systemic barriers -

Please provide a high-level description of the systemic barriers (e.g., summarize what the barriers are and how they were identified):

Some FDGs likely experience systemic discrimination in recruitment and hiring of CRCs. It was difficult to find systemic discrimination because of the small number of chair positions and the previous competitions followed inconsistent processes, making it difficult to identify systemic problems. The review process revealed numerous instances where systems could be improved to avoid areas where unconscious bias is known to commonly have a discriminatory effect.

Corresponding actions undertaken/to be undertaken to address the barriers:

	If you have no action to report, please type 'N/A' in the answer field.	Progress to date
Corresponding action 1	Implementation of previous changes to the Process for Nominating and Accepting a Canada Research Chair.	Completed
Corresponding action 2	Continuing to track the number of people identifying with the four designated groups in the applicant pool.	Completed
Corresponding action 3	Continuing to analyze the self-identification statistical information.	Completed
Corresponding action 4	Continued to make improvements to the Process for Nominating and Accepting a Canada Research Chair.	In progress
Corresponding action 5		Not yet started
Corresponding action 6		Not yet started

Data gathered and Indicator(s) - can be both qualitative and quantitative:

UPEI is monitoring whether we meet the equity targets established by Canada Research Chair Program as an indicator, and is monitoring the progress made towards these goals. Unfortunately, due to the small numbers of chair positions at UPEI and the need to protect the personal information of chairholders, we are not able to disclose this information in this report, as the information will be publicly available. UPEI remains committed to meeting the equity targets set through the process. In the previous reporting period, UPEI improved several hiring related processes for CRC hiring. Those processes are now being monitored for success. We are gathering data on those processes, to determine whether they are scalable for implementation at a broader level.

Outcomes and Impacts made during the reporting period:

In the previous reporting period UPEI reported on significant changes to the recruitment and hiring process for CRCs. The result is that the process can now be implemented in a manner that is more systemic, and better able to ensure EDI is embedded in the process.

Challenges encountered during the reporting period:

The Equity, Diversity, and Inclusion Officer was on parental leave in September 2021 – March 2022. Progress slowed while she was away from the Office. UPEI was not able to review any new information about applicants identifying as one of the four designated groups in the applicant pools for searches in this period, because no CRC searches at UPEI were in that phase during this reporting period. UPEI remains committing to reviewing this data in years when it is available. With the relatively low number of CRCs at UPEI, it takes time to monitor the success of changes to the CRC recruitment process to determine whether they are working.

Next Steps (indicate specific dates/timelines):

Continued analysis of the returned self-identification forms. - Ongoing. Continuing our commitment to meet the ongoing targets established by the Canada Research Chairs Program. - Ongoing

Was funding from the CRCP EDI stipend used for this key objective?

No

If the answer to the previous question was 'yes', indicate how much of the funding was spent on this key objective and specifically what the funds were spent on.

Key Objective 3

Brief description of S.M.A.R.T. (specific, measurable, aligned with the wanted outcome, realistic and timely) Key Objective 3:

Ensuring equity, diversity, and inclusion is embedded into the recruiting and hiring of a Canada Research Chair.

Systemic barriers -

Please provide a high-level description of the systemic barriers (e.g., summarize what the barriers are and how they were identified):

Some FDGs likely experience unconscious bias in recruiting and hiring processes. This was identified through campus wide consultations held with over 400 people. It was not possible to make this finding specific to the CRC process, but consultations showed a belief that unconscious bias was having a negative impact on hiring committee decisions.

Corresponding actions undertaken/to be undertaken to address the barriers:

	If you have no action to report, please type 'N/A' in the answer field.	Progress to date
Corresponding action 1	Developing new equity, diversity, and inclusion training for CRC hiring committees, in an online engaging module, with access to other campus users.	In progress
Corresponding action 2	Continuing to identify an Equity Champion on all Canada Research Chair hiring committees.	Completed
Corresponding action 3	Meeting with Equity Champions for CRC hiring Committees.	Completed
Corresponding action 4	Monitoring the success of the Equity Champion model for improvements and future applications.	Not yet started
Corresponding action 5	Improvements to collective agreement covering all faculty regarding EDI.	In progress
Corresponding action 6		Not yet started

Data gathered and Indicator(s) - can be both qualitative and quantitative:

Data was gathered through interviews with select individuals who had significant experience with hiring processes at UPEI and also had lived experience as a member of one of the FDGs. This information was used to uncover systemic barriers and biases built into the hiring processes at UPEI to inform continued efforts to improve these systems. Data was also gathered specifically through a focus session for members of the queer community who interact with hiring processes (typically as an applicant). That data is being used to inform best practices and make process improvements. Anonymous evaluation forms from the hiring committee members to assess effectiveness of EDI training materials continue to be collected. This training is now going through redevelopment. Equity champions identified on each search committee.

Outcomes and Impacts made during the reporting period:

Significant improvements were made to the hiring process and are now being implemented.

Challenges encountered during the reporting period:

UPEI has now moved to implement a number of changes to the hiring process informed by best practices in EDI. However there was only two competitions ongoing during this reporting period. It is very difficult to assess the effectiveness of changes with such small numbers.

Next Steps (indicate specific dates/timelines):

Implementation of an improved EDI in faculty hiring training made available to all involved in hiring a CRC. - Summer 2024. Implementation of a new Collective Agreement with the Faculty Association with improvements related to equity, diversity, and inclusion, including in the hiring process. - Summer 2023.

Was funding from the CRCP EDI stipend used for this key objective?

Yes

If the answer to the previous question was 'yes', indicate how much of the funding was spent on this key objective and specifically what the funds were spent on.

If the answer to the previous question was 'yes', indicate how much of the funding was spent on this key objective:

5000

If an amount was entered in the previous question, indicate specifically what the funds were spent on.

The money was used for the salary of the EDI in Employment Systems Advisor who is collecting information and data, and is in the process of completely redesigning the training for EDI in Faculty Hiring processes. This is a long term project.

EDI Stipend Impact Rating

Please rate the extent of the impact the EDI Stipend has had on your institution in meeting this key objective:

Major impact (the EDI Stipend had a major impact on achieving progress)

Indicate in the table below any leveraged cash or in-kind contributions provided by the institution

Leveraged cash or in-kind contributions from your institution (if applicable):

	Amount \$	Source / Type (cash or in-kind)
1	900	cash
2	5000	in kind

Key Objective 4

Brief description of S.M.A.R.T. (specific, measurable, aligned with the wanted outcome, realistic and timely) Key Objective 4:

Continue to expand and provide training and development related to equity, diversity and inclusion.

Systemic barriers -

Please provide a high-level description of the systemic barriers (e.g., summarize what the barriers are and how they were identified):

Once on campus, some FDGs report experiencing prejudice, micro -aggressions, and discrimination in their various interactions across campus. This was identified through campus wide consultations held with over 400 people. It was not possible to make this finding specific to CRCs, but their experience is not expected to be different than the campus wide community.

Corresponding actions undertaken/to be undertaken to address the barriers:

		Progress to date
Corresponding action 1	Include equity, diversity, and inclusion training in the Human Resources Management Learning Series.	Completed
Corresponding action 2	Provide tailored equity, diversity, and inclusion training for departments as capacity and need allows.	Completed
Corresponding action 3	Require senior administrators to be trained in Gender-based Analysis Plus (GBA+) to ensure they are equipped to consider how processes are experienced by diverse people.	In progress
Corresponding action 4	Incorporate an EDI component into graduate students training.	In progress
Corresponding action 5	Ensure equity, diversity, and inclusion training is provided to the Board of Governors and Senate.	In progress
Corresponding action 6	Collect information through formal and informal means to determine areas of campus who would benefit from tailored equity, diversity, and inclusion training.	In progress

Outcomes and Impacts made during the reporting period:

At least 12 in person training sessions occurred related to equity, diversity, and inclusion, including over 200 people. The myUPEI EDI site offers a growing collection of training, it is difficult to track who has accessed training, but our estimates are that approximately 100 people have accessed 200 training sessions online.

Challenges encountered during the reporting period:

Developing quality, meaningful, impactful equity, diversity and inclusion training is time consuming. The Equity, Diversity, and Inclusion Office has an ongoing time commitment to the development of training materials. However the Office's production of training materials has been unable to meet the demand for training on campus. UPEI continues to encounter challenges to tracking whether users actually complete training made available online. The Equity, Diversity, and Inclusion Officer was on parental leave in September 2021 – March 2022. Progress slowed while she was away from the Office. A lot of training and information is available through the myUPEI EDI site to ensure it is accessible to everyone on campus. However, many faculty/staff do not use myUPEI at all, and therefore do not look there to find resources. While efforts are being made to drive awareness of the site, building awareness will take time. The EDI Office has built the EDI training for graduate students and graduate supervisors, but has not met our set timeline, due to difficulties with determining the appropriate method for implementation of the requirement.

Next Steps (indicate specific dates/timelines):

Provide tailored equity, diversity, and inclusion training for departments as capacity and need allows. - Ongoing. Require senior administrators to be trained in Gender-based Analysis Plus (GBA+) to ensure they are equipped to consider how processes are experienced by diverse people. - Winter 2023. Make regular EDI training mandatory for Departmental Chairs, Deans, Research Services staff, and Human Resources staff with functions in human resources or employee services. - Winter 2024. Incorporate an EDI component into graduate students training. - Summer 2024. Ensure equity, diversity, and inclusion training is provided to the Board of Governors and Senate. - Spring 2024.

Was funding from the CRCP EDI stipend used for this key objective?

Yes

If the answer to the previous question was 'yes', indicate how much of the funding was spent on this key objective and specifically what the funds were spent on.

If the answer to the previous question was 'yes', indicate how much of the funding was spent on this key objective:

10000

If an amount was entered in the previous question, indicate specifically what the funds were spent on.

The money was used for the salary of the EDI in Employment Systems Advisor who is developing and delivering training. They are in the process of completely redesigning the training for EDI in Faculty Hiring processes.

EDI Stipend Impact Rating

Please rate the extent of the impact the EDI Stipend has had on your institution in meeting this key objective:

Extensive impact (the EDI Stipend had an extensive impact on achieving progress)

Indicate in the table below any leveraged cash or in-kind contributions provided by the institution

Leveraged cash or in-kind contributions from your institution (if applicable):

	Amount \$	Source / Type (cash or in-kind)
1	10000	in kind

Key Objective 5

Brief description of S.M.A.R.T. (specific, measurable, aligned with the wanted outcome, realistic and timely) Key Objective 5:

Ensure that our Chairholders feel equally included, integrated, supported and are retained.

Systemic barriers -

Please provide a high-level description of the systemic barriers (e.g., summarize what the barriers are and how they were identified):

Some FDGs do not experience true inclusion on campus. This was identified through campus wide consultations held with over 400 people. This finding could not be made specific to the CRC program, but is expected to be consistent. Some FDGs are disadvantaged in their access/navigation of many UPEI systems and processes because information is not transparent, and FDGs experience inequality in their access to informal supports to obtain necessary or helpful guidance through those processes. This was identified through campus wide consultations held with over 400 people. The difficulty of determining how to navigate UPEI processes was noted across all identities including those with the most privilege. However, in-person consultations revealed that when prompted, those with privilege reported the most successful method of overcoming this challenge was reliance on informal relationships with administrative staff. Disadvantaged groups were less likely to cite that as a method of overcoming this challenge or reported difficulties in relying on the method.

Corresponding actions undertaken/to be undertaken to address the barriers:

	If you have no action to report, please type 'N/A' in the answer field.	Progress to date
Corresponding action 1	Develop a guide, to direct the University in the hiring process, with established and standardized equitable processes for determining support provided to a Canada Research Chair, to reduce impact of negotiation.	Completed
Corresponding action 2	Release a new Research @ UPEI Start-Up Guide and provide to all new CRCs indicating who can provide guidance and/or support on a range of relevant internal or external information or opportunities.	Completed
Corresponding action 3	Release of the new UPEI Strategic Research Plan (2023 - 2028) Roadmap to Research Excellence, which reflects an equity, diversity, and inclusion lens.	Completed
Corresponding action 4	Across the institution, begin hiring all personnel with the equity, diversity, and inclusion skills relevant to the position.	In progress
Corresponding action 5	Making the process for faculty to pursue accommodations more transparent.	In progress
Corresponding action 6	Reviewing accessibility of campus and making improvements where necessary.	Completed

Data gathered and Indicator(s) - can be both qualitative and quantitative:

Data was gathered by the EDI in Employment Systems Advisor regarding the hiring process, with a focus on input from people from underrepresented groups, to inform the development of hiring processes. Campus accessibility review conducted on campus during this time, by an external partner, collecting information about various accessibility issues on campus, and meeting with various campus partners, with the final report being shared with the EDI Office.

Outcomes and Impacts made during the reporting period:

Created the Canada Research Chair Hiring Guidelines, to guide the negotiations process to reduce impact of systemic discrimination. Developed and implemented a new Letter to Candidates to provide them with more information needed for the process, to ensure equitable access to information. Developed a Negotiation Worksheet to guide the process and reduce systemic discrimination. Developed a CRC Offer Recommendation Form, to reduce systemic discrimination as part of the onboarding process. Released the Research @ UPEI Start-Up Guide with information related to EDI included. UPEI Strategic Research Plan (2023 - 2028) Roadmap to Research Excellence, which reflects an equity, diversity, and inclusion lens. Campus accessibility review completed.

Challenges encountered during the reporting period:

Two of the actions in this category require collaboration with the Human Resources Department. The Department is currently experiencing high volume levels as compared to staff resources. This has made it difficult to work with them on future planning, when they are having difficulty meeting the day-to-day expectations of the Department. They remain committed to EDI, and we will continue to work with them to incorporate best practices.

Next Steps (indicate specific dates/timelines):

Hold an equity, diversity, and inclusion presentation as part of the Chairs and Deans Workshop. - Summer 2023. Ensuring that equity, diversity, and inclusion are part of the development of new and review of existing policies. - Summer 2024. Directly encouraging and supporting all areas of campus to proactively make information available about common practices for meeting diverse needs. - In progress. Encouraging the inclusion of equity, diversity, and inclusion competencies as a factor in all committee composition. - In progress

If the answer to the previous question was 'yes', indicate how much of the funding was spent on this key objective and specifically what the funds were spent on.

Key Objective 6

Corresponding actions undertaken/to be undertaken to address the barriers:

If you have no action to report, please type 'N/A' in the answer field.		Progress to date
Corresponding action 1		Not yet started
Corresponding action 2		Not yet started
Corresponding action 3		Not yet started
Corresponding action 4		Not yet started
Corresponding action 5		Not yet started
Corresponding action 6		Not yet started

If the answer to the previous question was 'yes', indicate how much of the funding was spent on this key objective and specifically what the funds were spent on.

PART B: Challenges and Opportunities

Challenges

Other than what has been outlined in the section above, outline any challenges regarding the implementation of the EDI action plan. If COVID-19 has had an impact on the implementation of the institution's action plan, please outline how below. How has or will the institution address these challenges? (limit: 5100 characters):

The most significant challenge to the implementation of the UPEI CRC EDI Action Plan is simply that these actions take time and staff resourcing. The EDI Office is small, which limits our ability to lead projects. The EDI Officer also spends a considerable amount of time providing advice to others on the implementation of other EDI projects, which while is a valuable and effective use of time, it draws away from the specific projects that are laid out in the CRC EDI Action Plan. So, while good work is being done, it is not always the work that was planned. Most of the remaining work to be completed in the CRC EDI Action Plan requires participation from other faculty and staff on campus outside of the EDI Office. This is difficult to coordinate, as those roles struggle to take on additional projects. While many of our partners are interested in doing this work, they have difficulty finding time for these projects, while their day-to-day immediate departmental needs are pressing. An ongoing challenge is the amount of time it takes to build quality training materials. There is a strong desire in the equity, diversity, and inclusion office to build quality training for the campus community. However, with limited staffing, this is a significant hurdle to build training to respond to the needs on campus. We continue to try to seek out materials from other universities and gain permission to use the content on our campus. We also struggle with the implementation of training, as when training is available, some groups on campus do not access or attend the training available. We have had the highest success in accessing management level staff but have struggled with implementation in other areas. A challenge this reporting year that was unique to UPEI was our situation related to allegations of sexual harassment on campus. As has been reported publicly, and is widely discussed in our campus community, a disclosure involving an allegation of workplace misconduct was brought against the President of UPEI. He resigned in December 2021, and the Board of Governors announced that they had hired law firm Rubin Thomlinson LLP to conduct an independent review of University workplace policies, practices, procedures related to harassment and discrimination, and survey members of the UPEI community regarding these issues. While the review was announced in December 2021 by the end of the reporting period, December 2022, Rubin Thomlinson had not yet completed their report. This had a significant impact on the campus community, many of whom were anxiously awaiting the results. It was also anticipated that their recommendations may impact our planning on equity, diversity, and inclusion initiatives, yet the impact was unknown, so some projects were paused to ensure there would be alignment with the recommendations from that process, but Rubin Thomlinson did not provide a timeline on when their report would be released.

Opportunities

Other than what has been outlined in the section above, outline any opportunities or successes regarding the implementation of the EDI action plan, as well as best practices that have been discovered to date. (limit: 5100 characters):

A significant opportunity was the grant from CRC. This allowed us to recruit and hire an Equity, Diversity, and Inclusion in Employment Systems Advisor. It allowed significant dedicated time towards large projects. We were also able this year to use internal resources to bridge the funding for the salary between the two EDI Stipends. In the previous round of funding, the EDI Stipend only provided the salary level to fund an 8-month term position. This meant that we were only able to offer an 8-month term, with no expectation of renewal. This year we were able to find internal funds to bridge the gap between the two awards. This has meant that we were able to offer a longer contract to the incoming person, with a renewal possibility. This consistency in staffing is important to building efficiency in the office operations. Another opportunity this year was the beginning of an organizational restructuring which brought the Sexual Violence Prevention and Response Office together with the Equity, Diversity, and Inclusion Office. Since the combined staffing is less than 5 people, this allowed for greater collaboration and sharing of expertise between the staff. This has led to deeper incorporation of intersectionality within the Sexual Violence Prevention and Response Office, and a more trauma informed approach to the work of the Equity, Diversity, and Inclusion Office. It has also meant that skills can be utilized across the two offices. A huge achievement this year has been the development of the first progress reporting on the institutional EDI Strategy. Collecting reporting from across the institution has led to a greater understanding of what projects are underway across campus, and the EDI Office is excited to share these successes with the rest of the campus community in 2023. It is hoped that this will also help guide other departments in their efforts to engage with our equity, diversity, and inclusion action plan and strategy. The cooperation of Deans and Directors from across campus made this a significant achievement for the University and highlights the important work that is being done. Another best practice has been the close alignment between the Equity, Diversity, and Inclusion Office and Research Services. The EDI Office has worked hard to collect resources and information most relevant to the EDI issues that researchers face. However, the EDI Office does not have direct communication channels with researchers. The alliance between the work of the two offices, has meant that Research Services is promoting the EDI best practices at the points in research when those resources are most relevant to their work. This alignment between the offices has meant a greater impact on those in our research community. We see this as well with some of our highest engagement being our resources for researchers.

PART C: Reporting on EDI Stipend objectives not accounted for in Part A

Instructions:

- Institutions with EDI Action Plans, use this section to report on EDI Stipend objectives that are not accounted for in Section A.
- Institutions without EDI Action Plans, use this section to report on EDI Stipend objectives.
- If you did not receive an EDI stipend during the reporting year, please leave this section blank.

Objectives associated with your institution's EDI Stipend application

Table C1. Provide information on the objectives associated with your institution's EDI Stipend application, including the funding and timelines, for the reporting period.

EDI Stipend Objective 1

Indicate the S.M.A.R.T. (specific, measurable, aligned with the wanted outcome, realistic and timely) objective(s) towards which this funding has been directed:

Hire an EDI Officer (position is vacant) to assist in implementing changes to address systemic barriers and biases by working to integrate EDI best practices into broader institutional level practices, policies, and traditional processes. EDI Officer will play a key role in embedding EDI principles into key enterprise processes.

Indicator(s): Describe indicators, as presented in the EDI Stipend application, and how they are calculated.

Successful integration of EDI best practices within University HR policies and processes. Increase in equitable and inclusive participation in research (including research teams, students, postdoctoral students, co-investigators, co-applicants, internal and/or external collaborators, and various committees) and the overall workplace.

Progress: Describe results observed, including indicator results, outcomes, impacts. Include timelines (start and end dates).

An Equity, Diversity, and Inclusion in Employment Systems Advisor was hired to complete this work. They have worked closely with the Human Resources Department to integrate best practices in EDI in various HR processes. Significant projects have included drafting accommodations procedures applicable to all faculty and staff; preparing materials for the integration of a project to hire all staff with the EDI competencies relevant to the position; and improving the process for staff to obtain accommodations as part of the recruitment process. These projects are in various stages of development and implementation. It is too early to measure the impact of the process changes at this time.

Outline the total expenditures below:

Total funds of EDI stipend spent on the objective:	17000
Institutional commitment (if applicable):	25000
Total funds spent:	

Indicate in the table below any leveraged cash or in-kind contributions provided by your institution:

	Amount \$	Source / Type (cash or in-kind)
1	25000	in kind

Table C2. EDI Stipend Impact Rating

Please rate the extent of the impact the EDI Stipend has had on your institution in meeting this objective as identified in your application, for the reporting period:

Major impact (the EDI Stipend had a major impact on achieving progress)

Provide a high level summary of how the stipend was used:

An Equity, Diversity, and Inclusion in Employment Systems Advisor was hired who is working to implement EDI best practices across all HR processes and procedures.

Do you have other objectives to add?

Yes

PART C: Reporting on EDI Stipend objectives not accounted for in Part A

Additional Objectives (if applicable)

Table C1. Provide information on the objectives associated with your institution's EDI Stipend application, including the funding and timelines, for the reporting period.

EDI Stipend Objective 2

Indicate the S.M.A.R.T. (specific, measurable, aligned with the wanted outcome, realistic and timely) objective(s) towards which this funding has been directed:

Building on EDI training developed for those involved in CRC recruitment and hiring, UPEI will develop and deliver EDI training for all levels of the organization to develop a better understanding of systemic barriers, their consequences, and how every person has a role in addressing barriers and bias.

Indicator(s): Describe indicators, as presented in the EDI Stipend application, and how they are calculated.

Participation by members of the UPEI Board of Governors and UPEI Senate in training. Number of researchers, faculty, staff, and students (graduate and undergraduate) that participate in training. Participation of research teams and hiring committees. Collection of information to determine areas of campus that would benefit from tailored EDI training.

Progress: Describe results observed, including indicator results, outcomes, impacts. Include timelines (start and end dates).

An Equity, Diversity, and Inclusion in Employment Systems Advisor was hired. A significant project is the complete overhaul of the training for faculty involved in the hiring process. A new platform was obtained to better deliver this training. Research was done to ensure it was developed with an understanding of the needs of the FDG through the process. We are also offering online training through our existing internal platform myUPEI EDI. Through that platform an estimated 100 people accessed 200 training opportunities in the reporting period. An additional 200 people attended in person training related to EDI in the period. Further training is under development, and we continue to collect information related to the areas of campus that would benefit from tailored EDI training.

Outline the total expenditures below:

Total funds of EDI stipend spent on the objective:	5000
Institutional commitment (if applicable):	10000
Total funds spent:	

Indicate in the table below any leveraged cash or in-kind contributions provided by your institution:

	Amount \$	Source / Type (cash or in-kind)
1	10000	in kind

Table C2. EDI Stipend Impact Rating

Please rate the extent of the impact the EDI Stipend has had on your institution in meeting this objective as identified in your application, for the reporting period:

Major impact (the EDI Stipend had a major impact on achieving progress)

Provide a high level summary of how the stipend was used:

An Equity, Diversity, and Inclusion in Employment Systems Advisor was hired who is working to implement EDI training for faculty hiring processes as well as other issues.

EDI Stipend Objective 3

Indicate the S.M.A.R.T. (specific, measurable, aligned with the wanted outcome, realistic and timely) objective(s) towards which this funding has been directed:

Build upon EDI best practices and training implemented for CRC recruitment and hiring to develop a broader ongoing communications strategy which promotes EDI understanding, awareness, and action for all areas of the research and workplace environment.

Indicator(s): Describe indicators, as presented in the EDI Stipend application, and how they are calculated.

Campus awareness of EDI based on communications; number of researchers, faculty, staff and graduate students participate in training sessions based on promotions through communications; surveys post-training sessions. Feedback from individuals from underrepresented groups on participation in research and overall workplace initiatives before and after implementation of communications strategy.

Progress: Describe results observed, including indicator results, outcomes, impacts. Include timelines (start and end dates).

An Equity, Diversity, and Inclusion in Employment Systems Advisor was hired to complete this work alongside the Equity, Diversity, and Inclusion Officer. We have worked to build campus awareness by adding resources regarding EDI on our internal myUPEI EDI site, and continuing to promote this resource across campus. Approximately 250 people have accessed the site to review information in the reporting window. Additionally 200 people attended in person training. We continue to monitor feedback received through evaluation channels. Messages regarding the EDI Office and the resources and services available on campus, have also been sent out in campus wide communications at several points this year.

Outline the total expenditures below:

Total funds of EDI stipend spent on the objective:	8000
Institutional commitment (if applicable):	10000
Total funds spent:	

Indicate in the table below any leveraged cash or in-kind contributions provided by your institution:

	Amount \$	Source / Type (cash or in-kind)
1	10000	in kind

Table C2. EDI Stipend Impact Rating

Please rate the extent of the impact the EDI Stipend has had on your institution in meeting this objective as identified in your application, for the reporting period:

Major impact (the EDI Stipend had a major impact on achieving progress)

Provide a high level summary of how the stipend was used:

An Equity, Diversity, and Inclusion in Employment Systems Advisor was hired who is working to build an internal resource for EDI best practices, resources, and training, and communicating that information with our campus community.

EDI Stipend Objective 4

EDI Stipend Objective 5

EDI Stipend Objective 6

Part D: Engagement with individuals from underrepresented groups

Outline how the institution has engaged with underrepresented groups: e.g., racialized individuals, Indigenous Peoples, persons with disabilities, women, 2SLGBTQIA+ individuals, during the implementation of the action plan (during the reporting period), including how they have been involved in identifying and implementing any course corrections/adjustments, if applicable. For example, how was feedback gathered on whether the measures being implemented are resulting in a more inclusive research environment for chairholders of underrepresented groups? How has intersectionality been considered in developing and implementing the plan (if applicable)? Have new gaps been identified? How will members of underrepresented groups continue to be engaged? (limit: 10 200 characters)

During the reporting window the EDI Office had only two people working in the office. Thus, carrying out community consultations every year is not feasible. We rely on consultation from previous years that we have saved and organized. Although 2022 was not intended to be a significant year for campus wide consultation, the EDI Office consulted with diverse members of the campus community particularly faculty and students who are heavily involved in their communities in the creation of various projects. In 2022, the EDI Office also built collaborative relationships between the University and organizations that serve marginalized communities on PEI. Consultations with these organizations have informed the work conducted towards the CRC EDI Action Plan and future consultations will be carried out in 2023. A commitment to intersectionality remains at the forefront of all the initiatives of the CRC EDI Action Plan.

PART E: Efforts to Address Systemic Barriers More Broadly within the Institution

Briefly outline other EDI initiatives underway at the institution (that are broader than those tied to the CRCP) that are expected to address systemic barriers and foster an equitable, diverse and inclusive research environment. For example, are there projects underway that underscore the importance of EDI to research excellence? Is there additional training being offered to the faculty at large? Are there initiatives to improve the campus climate? Please provide hyperlinks where relevant, using the hyperlink boxes provided below (URLs should include https://). Note that collecting this information from institutions is a requirement of the 2019 Addendum to the 2006 Canadian Human Rights Settlement Agreement and provides context for the work the institution is doing in addressing barriers for the CRCP. (limit: 4080 characters)

<https://www.upei.ca/equity-diversity-and-inclusion>
https://files.upei.ca/edi/upei_edi_strategy.pdf
https://files.upei.ca/edi/upei_edi_progress_report_2023.pdf
https://files.upei.ca/research/research_quick_start_guide.pdf
https://files.upei.ca/research/upei_strategic_research_plan.pdf

The EDI Office at UPEI leads the institution with our work to address systemic barriers and foster an equitable, diverse and inclusive environment. The EDI Office works collaboratively with the VPAR and Research Services office to advance EDI in the research environment. EDI has specifically been built into the Research @ UPEI Start-Up Guide the Strategic Research Plan (2023 – 2028), and a new requirement for annual report that includes progress with respect to UPEI's EDI Strategy. The most significant EDI initiative of UPEI is the UPEI EDI Strategy. This campus wide strategy is a 75-action point plan for how UPEI will move forward with embedding EDI across all aspects of the institution. One of the five focus areas of the EDI Strategy is "Success of Faculty, Researchers, and Staff" and includes a variety of actions that are intended to improve EDI in the research environment. In 2022, the EDI Office led the development of the first progress reporting on the EDI Strategy. While it was not released in the reporting year, we are including a link to the Progress Report. The Progress Report covers the period from January 2021 – June 2022, thus it outlines many significant achievements of the University towards building a more equitable and inclusive campus. There are 226 actions outlined in report, including: • The VP Academic and Research and Research Services Office have incorporated EDI competencies into the governance documents for various of committee structures which were undergoing development or review. For example, a new requirement was added that all committees under the Research Advisory Committee have EDI training recommended. This includes committee members that adjudicate processes for internal and external research grants, fellowships, and scholarship competitions. • The Atlantic Veterinary College began incorporating EDI competencies into graduate student committee structures. • Introduction of a statement to all job advertisements that expresses the University's commitment to equity, diversity, and inclusion. • An increasing number of departments are including specific questions about EDI as part of interview processes. • Creating new positions including: a Nurse Practitioner to focus specifically on faculty, students, and staff who experience ADHD; Advisor to the Vice-President Academic and Research on Indigenous Affairs; a Program Facilitator in Student Affairs with responsibility for incorporating EDI into campus life programming; and a new International Student Advisor who has is a regulated Canadian Immigration Consultant (all are firsts for UPEI). • HR is working to implement EDI best practices into all process. Projects completed in this period included training, increasing gender inclusive language in all forms, letters, and collective agreements, as well as increasing pay transparency. • The Teaching and Learning Centre and Research Services provide information related to EDI to new faculty members. • The myUPEI EDI page now includes a washroom information chart to identify washroom features relevant to various groups. • The EDI Office has developed an internal myUPEI page, "Resources for Researchers" where training is available on demand, and other resources are shared. The Research Services Office works to promote use of the site amongst our researchers. • The Faculty of Sustainable Design Engineering, Robertson Library, and all CRC positions have adopted a practice of requiring an EDI and reconciliation statement as part of the application process for all new faculty positions. • Provided training to managers regarding the incorporation of equity champions into committee structures. • The 4 Seasons Reconciliation Training was launched and offered to all faculty and staff. • All Deans, Chairs, and Managers are regularly invited to training opportunities by both internal and external providers, on topics related to EDI. • An accessibility audit was conducted and indicated improvements are underway. • UPEI became a signatory to the Scarborough Charter.

Hyperlink 1:

<https://www.upei.ca/equity-diversity-and-inclusion>

Hyperlink 2:

https://files.upei.ca/edi/upei_edi_strategy.pdf

Hyperlink 3:

https://files.upei.ca/edi/upei_edi_progress_report_2023.pdf

Hyperlink 4:

https://files.upei.ca/research/research_quick_start_guide.pdf

Hyperlink 5:

https://files.upei.ca/research/upei_strategic_research_plan.pdf

Before submitting your report, please ensure that your responses are complete. You will not be able to edit the information after it is submitted.

This information will be sent to the Tri-agency Institutional Programs Secretariat when you click 'Submit'. You will receive a confirmation email with a copy of your completed form in HTML format once it is submitted.

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