



**University of Prince Edward Island
Canada Research Chairs
Equity, Diversity, and Inclusion Action Plan
- Addendum**

Updated: March 2024



We acknowledge that the University of Prince Edward Island
is located on the traditional, unceded territory of the Mi'kmaq People.

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ADDENDUM

This addendum to the UPEI CRC EDI Action Plan, dated March 2024, includes "Updates to Institutional Canada Research Chairs EDI Action Plan". The addendum incorporates key elements of the "UPEI Action Plan on Cultural Renewal: Building Trust, Safety, and Inclusion on our Campus" that was drafted (and endorsed by UPEI Senate, March 2024) in response to the University Review report submitted by Rubin Thomlinson (in June 2023). The August 2023 version of the UPEI CRC EDI Action Plan was audited by CRCP and thus will remain active for version control purposes.

Updates to Institutional Canada Research Chairs EDI Action Plan

University of Prince Edward Island

March 21, 2024

Background

UPEI's [Canada 7 Research Chairs Equity, Diversity, and Inclusion Action Plan](#) is designed to address systematic and institutional barriers experienced by women, visible minorities, persons with disabilities, and/or Indigenous persons. It ensures equity, diversity, and inclusion (EDI) is embedded in the recruiting and hiring of a CRC. The action plan aims to ensure that UPEI's chairholders feel equally included, integrated, supported and retained.

This action plan was first developed in 2019. A consultation process, employment systems review, and environmental scan were completed at that time. In 2020, UPEI worked collaboratively with CRC through a Phase 2 Review Process and made substantial improvements to the plan in response to the guidance of an external panel of experts. Then in 2021, UPEI released an institution wide [Equity, Diversity and Inclusion Strategy](#). The Strategy is intended to guide UPEI in identifying and removing barriers, encouraging participation, and working towards an inclusive campus culture.

The CRC EDI Action Plan was then revised again in 2021 to include information from UPEI's institutional EDI Strategy, and to continue to make improvements. In 2021, UPEI went through a Phase 3 Review Process with CRC, and made additional improvements to the CRC EDI Action Plan, in response to the external panel of experts' feedback. This period between 2019 – 2021 was the development and review phase of the Action Plan, which led to a final set of goals and actions, agreed to by both CRC and UPEI.

The Phase 3 rating – Spring 2021 – was officially rated as “Satisfies” in June 2021 by CRC (ref: https://www.chairs-chaires.gc.ca/program-programme/equity-equite/results_of_formal_review-resultats_de_l_evaluation_officielle-eng.aspx). Since ending that process, in respect of the peer-review process, no further substantive changes to the CRC EDI Action Plan have been made. In 2022, and again in August 2023, minor revisions of the CRC EDI Action Plan were made to update only the sections on the chair allocations, equity targets, and progress on UPEI's actions. The “December 2022 Equity Target Deadline” was reviewed by CRC and no restrictions were placed on UPEI (ref: <https://www.chairs-chaires.gc.ca/program-programme/equity-equite/consequences-eng.aspx><https://www.chairs-chaires.gc.ca/program-programme/equity-equite/consequences-eng.aspx>). UPEI is currently meeting the December 2022 chair allocations targets.

UPEI has been working diligently on its progress towards the 5 objectives, and 53 actions outlined in its CRC EDI Action Plan. To date, UPEI has completed nearly 80% of that work, and the remaining action items are now all in progress. The University is anticipating

a significant revision of its CRC EDI Action Plan, which will incorporate ongoing consultation work being conducted by the EDI Office and elsewhere on campus. As part of that significant revision, UPEI will be considering the best way to encompass the Action Plan in response to the University Review conducted by Rubin Thomlinson (details below). It will also reflect upon expected guidance from the Canada Research Chairs program regarding the next phase in institutional EDI action plans.

Institutional Commitment

UPEI is committed to the core values of equity, diversity, and inclusion across the campus community. It has an Equity, Diversity, and Inclusion Steering Committee co-chaired by the Vice-President, Academic and Research, and the Vice-President, People and Culture. The committee's work identifies and develops opportunities to implement EDI measures, programs, activities, and initiatives at the University.

UPEI also has a Joint Equity Committee comprised of members from the UPEI Faculty Association and the UPEI administration. The committee considers and recommends policies and procedures for equity-related matters. The committee ensures that training occurs on any such equity-related policies, procedures, and practices, e.g. selection committees, tenure and promotion committees, and during research adjudication at UPEI. The CRCs at UPEI benefit from outcomes of this institutional committee and its work. CRCs at UPEI fall under the Faculty Collective Agreement and are protected under Article A-7 which addresses Non-Discrimination.

Rubin Thomlinson (RT) Report

In December 2021, Rubin Thomlinson LLP was retained by the University to conduct an independent third-party investigation of an allegation concerning the former president and a review of the University's workplace policies and practices with respect to harassment and discrimination. UPEI released Rubin Thomlinson's report, called the [University of Prince Edward Island Review](#) (UPEI Review), in June 2023.

As described in the UPEI Review, members of the UPEI community have been deeply impacted by discrimination, harassment, and sexual violence, among other problems outlined in the review. The University is committed to providing resources and supports to faculty, staff, and students, who have been and continue to be affected.

UPEI is further committed to addressing the recommendations in the UPEI Review report. An [Action Plan Advisory Group](#) was promptly formed to provide input and guidance from multiple stakeholder perspectives. The consultation heard the challenges in UPEI's working and learning environments, as well as suggestions to address these challenges.

A preliminary draft of the [UPEI Action Plan](#) reflects the candid input and feedback gathered through the consultations over a six-month period. These consultations included input from more than 350 campus members through two townhalls and 16 listening sessions, more than 650 hours of collective work by the community representatives within the Action Plan Advisory Group, and numerous discussions with various UPEI partners.

Following the release of the draft UPEI Action Plan, the entire campus community was again invited to participate in a [community consultation](#) on the preliminary draft. This process included an open anonymous survey sent to all members of the campus community. The Interim President also led numerous meetings to gain feedback from campus community members.

The most recent version of the draft UPEI Action Plan was also shared with UPEI's governing bodies: the University Senate (endorsed March 15, 2024) and the UPEI Board of Governors, including its new Campus Culture Committee. Based on the review and discussions of the draft plan, UPEI will work to finalize the UPEI Action Plan for Board approval at a special meeting on March 27, 2024.

Support of Canada Research Chairs at UPEI

UPEI is committed to providing a quality environment for research and support of Canada Research Chairs and their teams, particularly given the issues that were found in UPEI's work culture in the Rubin Tomlinson report, and its findings regarding the health of the work environment at UPEI.

The UPEI Action Plan addresses concerns regarding the health of the University's work and study environment and its ability to adequately support CRCs and their teams. For example, Goal 4 will "put in place new policies and processes that focus on preventing and addressing discrimination, harm, and violence at UPEI". This includes several specific issues, supporting actions, responsible individuals, and timelines for action that include, but are not limited to:

- Action 4.1 Develop an EDI and Human Rights Department at UPEI
 - 4.1.1 Create New Department of Equity, Diversity, Inclusion and Human Rights
 - 4.1.2 Increase staff capacity in EDI, human rights, and sexual violence prevention
 - 4.1.3 Administer Harassment and Discrimination Policy
 - 4.1.4 Develop and deliver training
 - 4.1.5 Leverage feedback and data to inform decision making

- Action 4.3 Create a Harassment and Discrimination Policy for all members of the UPEI community
 - 4.3.1 Replace the Fair Treatment Policy

- Action 4.4 Finalize and Implement UPEI’s Revised Sexual Violence Policy
 - 4.4.1 Finalize revisions to the Sexual Violence Policy
 - 4.4.2 Implement the new Sexual Violence Policy
 - 4.4.3 Communicate the policy in plain language to campus President
 - 4.4.4. Implement mandatory sexual violence training for all campus members
 - 4.4.5 Collect statistical information

- Action 4.5 Establish Clear Feedback, Disclosure, and Reporting Mechanisms for Campus Members
 - 4.5.1 Establish anonymous and confidential feedback channels
 - 4.5.2 Respond respectfully to those who report issues

A 26-day strike by faculty members occurred at UPEI in March/April, 2023. In the spirit of repairing relationships, the University and UPEI Faculty Association have both contributed on the Action Plan Advisory Group toward the development of the UPEI Action Plan. Unions representing unionized faculty and staff at UPEI each had the opportunity to appoint a member on the Action Plan Advisory Group. The plan identifies processes of consultation with the Faculty Association, for example in 4.1.4 and 4.4.4, where the “President will consult with unions on an approach for implementation of the mandatory sexual violence prevention and training for union members.”

Recommendations and actions related to strengthening of leadership were included in the UPEI Action Plan. “Those in leadership roles at the University receive leadership training,

including”:

- respectfully managing professional relationships including teams;
- how to build and maintain a positive working and educational culture; and
- developing emotional intelligence.

The UPEI Action Plan identified 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. This further cooperation with the Faculty Association comes in terms of leadership training.

Actions Completed and Underway in Response to the RT Report

At the time of writing this document, UPEI is fervently working towards the release of the UPEI Action Plan and much of the Action Plan work is currently underway. Several actions were taken in the immediate aftermath of the release of the RT Report to help support the campus community. Those included:

- An apology was made to UPEI campus members through campus communications, media interviews, and in-person by the interim President and the Board Chair.
- 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.
- As an interim immediate measure, UPEI created 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.
- More information on how to make disclosures and reports of harassment or sexual violence, including those regarding senior leaders, was shared with campus members.
- Townhalls were held to hear from the campus community.

UPEI is committed to a comprehensive and deeply consultative process to develop and implement the Action Plan in response to the recommendations in the University Review. The actions taken to date include:

- 16 campus listening sessions were held by the interim President to hear from the campus community.
- 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. Each union appointed one member to the committee. The University used an external facilitator to consult with the 21-member Advisory Group to gather feedback and provide guidance to help inform actions. Throughout the process, information on the progress of the Advisory Group was shared with campus.
- 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 the response to the UPEI Review recommendations within the Action Plan.
- The Action Plan contains a public statement committing to the accountability provisions in the plan, which include all aspects of the UPEI Review recommendations, as well as additional components developed through feedback provided by the Action Plan Advisory Group and through campus listening sessions.
- The Action Plan contains an explicit apology, acknowledging harms, and a commitment to action that is signed by the Board Chair and interim President.
- The draft Action Plan was shared publicly on UPEI's website, and an invitation for feedback was sent broadly. Feedback mechanisms were set up to collect anonymous feedback from the community.
- Feedback from the community and various internal and external stakeholders was taken into consideration in the finalization of the Action Plan.

UPEI has also recognized that an important component of the response to the University Review is to increase its capacity, through both additional staffing and building capacity of our existing faculty, staff, and students. A number of measures have already been taken which include:

- Restructuring Security Services. A new Manager of Security Services has been hired, and the process of hiring additional staff for the unit has begun.
- A new position was created and hired for a Manager of Student Culture and Community Standards.

- UPEI has begun the process of hiring additional staff to support the new Equity, Diversity, Inclusion and Human Rights Department.
- UPEI created and hired a new administrative assistant position to support the Department of Equity, Diversity, Inclusion and Human Rights.
- A new leadership position, the Director of EDI and Human Rights, was created to provide oversight and leadership to the Department.
- UPEI has created new positions for: (1) sexual violence prevention and response coordination to supplement response capacity and improve prevention and response activities; (2) equity, diversity, and inclusion training and education; and (3) sexual violence prevention and education.
- UPEI has invested in new a partnership with the Canadian Centre for Diversity and Inclusion, a comprehensive EDI training partner. This allows all faculty, staff, and students to have access to a wide range of online training materials, and other resources regarding EDI.
- The University made an online sexual violence course available to all faculty, staff, and students.
- UPEI made an online sexual violence course mandatory for all incoming students

While the University is committed to all of the future work in response to the RT Report by the Action Plan, several immediate steps have already been taken to make improvements. Those include:

- UPEI is in the process of hiring a new University President through a transparent, consultative process that emphasizes due diligence in respect to vetting candidates. There has been regular communication and updates about the selection process to the campus community. The need to champion work on culture improvements (as outlined in the UPEI Review) was built into the job description. The following components were included in the selection criteria for the next President: commitment to equity, diversity, and inclusion; deep understanding of workplace fairness and harassment; track record of success in implementation of projects to advance EDI in meaningful ways; commitment to reconciliation and Indigenization; organizational change experience and desire to champion change; ethics, transparency, and integrity. A detailed job description was posted on the UPEI website for full transparency. Furthermore, the campus community was provided with robust consultation and feedback opportunities on the next President, which included public publications by shortlisted candidates. The campus community was provided opportunities to give anonymous feedback on shortlisted candidates. As part of the process, the hiring committee required shortlisted candidates to provide

a response to the UPEI Review recommendations and required shortlisted candidates to provide a response with respect to the draft Action Plan.

- UPEI has initiated an external review of the Board of Governors governance, and has committed to make changes in board procedures resulting from the review recommendations.
- The Board of Governors created a new Campus Culture Committee to oversee the implementation of the Action Plan. This committee has been formed and begun meeting.
- UPEI leadership began an enhanced level of consultation with the campus community and remains committed to continuing this work on an ongoing basis.
- UPEI initiated a new and transparent method for the recruitment of new Board members, including the use of a newly developed skills matrix to ensure a robust representation of skills, expertise, experience, and demographics, with a focus on increasing diversity and capacity on EDI.

Managing Chair Allocations

As discussed previously, the University is committed to transparency and accountability in its management of CRC allocations. UPEI follows the [Requirements for Recruiting and Nominating Canada Research Chairs](#). The selection of priority areas for Canada Research Chair position theme and research disciplines is the responsibility of a committee consisting of the Vice-President, Academic and Research, the Associate Vice-President Research, Deans from each Faculty, and the University Librarian. The committee reviews the areas proposed by Faculties to identify the best fit(s) with institutional priorities, the [UPEI Strategic Research Plan](#), and most importantly, equity and diversity targets, and the diversity expectations of potential applicant pool.

The recommendations are reviewed by University Senior Management, who authorizes the decision to proceed with a search after they have considered the equity and diversity targets and gaps. The Vice-President, Academic and Research, as Chair of the Application Review Committee (ARC), is responsible for ensuring that the CRC requirements are met throughout the process. The hiring process is conducted in accordance with the [Faculty Association #1 Collective Agreement](#), including the Letter of Understanding #2, Re: Canada Research Chairs, as well as all other applicable [University policies](#).

A Committee is then established, and the recruitment process may begin following the Canada Research Chair nomination program details and UPEI requirements. The Committee is expected to have representation from the area of expertise required, be multi-disciplinary in nature, and also have representation from various genders and/or cultures. The Committee must include an Equity Champion, and must also include at least one individual from one of the four designated groups (women, Indigenous peoples, persons with disabilities, and members of visible minorities). All committee members must complete the required equity, diversity, and inclusion training. The committee must also meet with UPEI's Equity, Diversity, and Inclusion Officer to discuss program requirements and expectations throughout the process.

The Committee will consider the requirement from CRC for UPEI to meet and/or sustain the current equity and diversity targets. They also consider locations for sharing advertisements or practices which could expand the pool to more women, persons with disabilities, Indigenous persons, visible minorities, and other disadvantaged groups. The Equity, Diversity, and Inclusion Officer also reviews the ad to ensure compliance with program requirements and provide advice relating to EDI. The committee makes recommendations on optimizing the institution's chair allocations using the corridor of flexibility provided by the CRC Secretariat. Decisions on selection are made by the Application Review Committee with approval of the University's senior management.

The Application Review Committee works with the Vice-President, Academic and Research, to determine financial and institutional contributions. UPEI has developed CRC Hiring Guidelines to direct the University through the hiring process, with established and standardized equitable processes for determining the support provided to a Canada Research Chair, to reduce the impact of negotiation by individual chairholders. For the last two CRCs at UPEI, the CRC Hiring Guidelines, Negotiation Worksheet, and Offer Recommendation Form were used, as committed to, in the EDI Action Plan.

UPEI will also provide new Canada Research Chairs with a resources bank package indicating who can provide guidance and/or support on a range of relevant internal or external information or opportunities. This will help ensure that there is no disadvantage to access resources when they start their position.