CANADA RESEARCH CHAIRS PROGRAM (CRCP) INSTITUTIONAL EQUITY, DIVERSITY AND INCLUSION (EDI) ACTION PLAN AND EDI STIPEND REPORT

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

- o 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.

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<tr><td align="center">INSTRUCTIONS</td></tr>
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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 also 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.

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

CANADA RESEARCH CHAIRS PROGRAM (CRCP) INSTITUTIONAL EQUITY, DIVERSITY AND INCLUSION (EDI) ACTION PLAN AND EDI STIPEND REPORT

Please complete the fields below.

Name of Institution:	University of Prince Edward Island
Contact Name:	Dr. Katherine Gottschall-Pass
Position Title:	Advisor to the President
Institutional Email:	kgottschall@upei.ca
Institutional Telephone Number:	902.566.0597
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**
- No

| 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):	October 1, 2021
Rating given 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

EDI ACTION PLAN KEY OBJECTIVES

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 underrepresented groups (e.g. women, persons with disabilities, Indigenous peoples and racialized minorities 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 (either the one approved by TIPS or the one current under review by TIPS), 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) what actions were undertaken; 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.

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 address the barriers:

- The University of Prince Edward Island Equity, Diversity, and Inclusion Strategy (hereinafter "UPEI EDI Strategy") was endorsed by the University Senate and approved by the Board of Governors in February 2021. This was the first ever equity, diversity, and inclusion action plan covering the entire institution.
- The UPEI Equity, Diversity and Inclusion Strategy was launched to the entire University community, through emails to all faculty, staff, and students.

- The Equity, Diversity, and Inclusion Officer did an interview with CBC News to discuss the new Equity, Diversity, and Inclusion Strategy.
- The UPEI Equity, Diversity, and Inclusion website was revamped with more information about EDI, links to the training and resources available for faculty/staff, and with information about the newly launched UPEI EDI Strategy.
- The myUPEI EDI page has been continuously updated and improved, with a focus on building on-demand training options, and providing resources based on role type (i.e. Resources for Researchers, Resources for Instructors, with plans to expand those categories).
- The EDI Steering Committee was strengthened with the addition of a new member, the Coordinator of the Mawi'omi Indigenous Student Centre was added.
- Hired an Equity, Diversity and Inclusion in Research Advisor.

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

- The internal intranet site for equity, diversity, and inclusion is "myUPEI: Equity Diversity, and Inclusion. The site is accessible to all faculty and staff. In 2021 the site had approximately 250 visitors and 750 site views. On average about twenty unique visitors accessed the page each month.
- EDI Officer regularly receiving requests from administrators for assistance in implementing EDI best practices.
- EDI Steering Committee continued to meet throughout this period. At each meeting, the committee members provide feedback and guidance on the steps that are being taken by the EDI Office, the implementation of the EDI Strategy, and also provide feedback on EDI issues at the institution generally.

Progress and/or Outcomes and Impacts made during the reporting period:

- This period resulted in the first ever institution wide equity, diversity, and inclusion action plan for the University. This was a significant accomplishment. Many people engaged in this project, and it was the culmination of a large amount of work by the many different actors involved with the project.
- The release of the EDI Strategy was widely publicized, and awareness of the EDI Strategy was high on campus.

Challenges encountered during the reporting period:

- After adding the Coordinator of the Mawi'omi Indigenous Student Centre to the EDI Steering Committee, that individual left the University, and although the position was advertised, the position was not refilled by the end of the reporting period.
- The Equity, Diversity, and Inclusion Officer was on parental leave September 2021 – March 2022. Progress slowed while she was away from the Office. The Equity, Diversity, and Inclusion in Research Advisor continued during the first part of her leave. Though the leave was short, at six months, it also meant that the EDI Officer opted to delay triggering initiatives in other parts of campus, as she could not offer support through the implementation period. As the EDI Officer has strong relationships with senior directors, it is anticipated that senior leaders delayed some of their implementation actions until the EDI Officer returned.

Next Steps (indicate specific dates/timelines):

• Continue to add resources and improve myUPEI EDI page.	Ongoing project, no end date planned.

There are no significant next steps with Objective 1. As Objective 1 was intended to build a proper foundation for the EDI program at UPEI. Now that the foundation is complete, UPEI is moving on to address actions items aimed at tackling specific issues at UPEI.

Was funding from the CRCP EDI stipend used for this key objective?
- o **Yes**
- o 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.

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

$500

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

The funds were used to hire an Equity, Diversity, and Inclusion in Research Advisor. A small part of their time was on these action items. Specifically, the EDI in Research Advisor collected additional resources to supplement the myUPEI EDI page, including the Resources for Researchers section.

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

- o Insignificant impact (the institution could attain similar progress towards this objective without the EDI stipend)

- **o Minor impact (the EDI Stipend had minimal impact on achieving progress)**

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

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

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

- o Don't know

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		
2		

Do you have other key objectives to add?
- **Yes**
- No

Note: If you select "Yes" you will be brought to a separate section where you may enter information for up to five additional key objectives and where, at minimum, you will be required to enter information for Key Objective 2 in order for that section to be considered complete. Otherwise, if you select "No", you will not be directed to the section for additional objectives and, therefore, will not have access to Key Objectives 2 through 6, in which case, completing the information for Key Objective 1 will be sufficient.

ADDITIONAL KEY OBJECTIVES FOR PART A IF APPLICABLE

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 address the barriers:

- Equity, Diversity, and Inclusion in Research Advisor began work to embed equity, diversity, and inclusion principles into key processes within UPEIs research enterprise, including the CRC programme.
- The Equity, Diversity, and Inclusion in Research Advisor did an extensive review of the CRC hiring practices. As a result of that review a number of new processes were developed including:
  - Canada Research Chair Hiring Guidelines – This document is required to be reviewed by the responsible Dean prior to negotiations with the selected Candidate, to assist the Deans in following our process in a manner that is equitable and inclusive. It provides advice on inclusive language, mitigating bias, and how negotiation styles can be impacted by systemic factors such as gender and cultural expectations that can lead to systemic discrimination over time. The document links to resources for the Dean to explore that may affect a particular situation (i.e., training on the differences in negotiation styles between men and women, and how to prepare for negotiating with someone who is not Canadian with country specific information). The document also addresses salary negotiations.
  - Changes were made to process for establishing the salary for a CRC. Additional information is provided to Deans about how to avoid systemic discrimination in the application of market differentials. Further, at UPEI we typically follow a defacto 1:1 ratio for establishing step (one year equals one step) but in some situations different arrangements were made. Information about the impact of systemic barriers is now provided to Deans. That information clarifies how protected leaves are to be counted (i.e. maternity/parental, medical) when counting 1:1. Deans also receive information about how relying on rank at previous institutions can lead to systemic discrimination. Further, because research excellence can be used to increase rank, Deans must now rely on the CRC "Guidelines for Assessing the Productivity of Nominees" to ensure research excellence is assessed in an equitable manner. The culmination of this is the requirement for any Dean proposing a step outside of the 1:1 ratio must now provide a written explanation to the VPAR, in line with those principles, and must obtain approval from the VPAR.
  - A change was made to the process for determining start-up funds. There is now an established process which the Dean and candidate must proceed through to consider the appropriate amount.
  - Negotiation Worksheet – this is a new document, which Deans are required to use (and must provide the completed form signed by the Dean and the CRC Nominee to the VPAR). The Negotiation Worksheet is designed to ensure Deans discuss specific issues with each CRC. It requires discussion of: cross appointments, teaching workload, requested rank, salary expectation, market differential, start up funds required, research/lab space requirements, equipment needs, and immigration support. This is designed to ensure that these issues are not overlooked, and their required discussion should ensure they are applied equitably rather than requiring the candidate to raise the issues themselves.
  - Letter to Candidates – This is a new document. It is a template letter, signed by the VPAR and given to the CRC candidate prior to negotiations. This document provides information to the candidate about: specific provisions in the Collective Agreement, the UPEI Faculty Association Standard Information Package for Candidates, the CAUT Handbook for New Faculty: Negotiating Starting Salaries, the process for ensuring equipment needs are met, cross-appointments, how to ensure the research/lab space is appropriate for their needs, startup funding, and immigration support. It is hoped that providing this information to candidates will help level the playing field, to ensure that all candidates have equitable

  access to the resources available.
  - o A new process and templated document were started where Deans are required to provide a copy of Negotiation Worksheet to the candidate in advance of contract negotiations.
  - o A new process was developed for considering space allocation for the candidate, it requires ensuring that they see the research space available to ensure it suits their needs.
- The "Process for Nominating and Accepting a Canada Research Chair" is a critical process document for outlining the process followed at UPEI. We continue to monitor that document to improve the process, and to embed inclusive measures on an ongoing basis. As the document sets out the process to be followed for a number of people involved, effort is made not to change the process mid-cycle. Instead, the Equity, Diversity, and Inclusion Officer and the Manager or Research Services both have a working copy of the document making changes and improvements throughout the year, which will be later compiled and approved before the next hiring cycle begins. During the reporting period the Equity, Diversity, and Inclusion in Research Advisor made a number of proposed changes to this document to incorporate the above noted new forms and processes these changes are slated for consideration at the end of the current hiring cycles.

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.
- We have tracked the applicants identifying as one of the four designated groups in the applicant pools for searches completed in this period. For the first time we have also collected information about sexual orientation.

Progress and/or Outcomes and Impacts made during the reporting period:

- Significant improvements were made to the hiring process. These changes were designed to combat systemic discrimination. The effectiveness of these measures will be difficult to track. As the changes are not about hiring diverse candidates, the changes are primarily aimed at ensuring that FDGs that are hired as CRCs are treated equitably in the onboarding process, and that they are not disadvantaged in comparison to others when it comes to matters such as salary, start up funding, support, space, etc. It was a significant effort to understand how these processes were working in practice and try to put parameters around the process that would protect against systemic discrimination. The redesigned process is much more robust and is expected to counter some of the impacts of systemic discrimination.
- UPEI has now completed all of the actions in this Objective. This marks considerable progress made.
- When analyzing the identification data, that information was compared against the CRC Equity Targets. UPEI is consistently attracting visible minority candidates at a high rate, and which considerably exceed equity targets. The rate of people with disabilities who are applying is similar to the target percentage. UPEI continues to watch with concern that the number of applicants who identify as male is frequently higher than the equity targets. It is difficult to

draw conclusions on the number of Indigenous applicants with such a small data set. However, this will continue to be an area which UPEI watches with concern.

Challenges encountered during the reporting period:

- The Equity, Diversity, and Inclusion Officer was on parental leave in September 2021 – March 2022. The Equity, Diversity, and Inclusion in Research Advisor continued during the first part of her leave. Progress slowed while she was away from the Office.
- It is difficult to draw conclusions from our self-identification data. We are making efforts to analyze the data, but it is difficult to draw meaningful conclusions. It was hoped that over time, with an increasing amount of information, it would be possible to find trends. However, it appears that the variation between the competitions is significant, making trend analysis difficult. While it is difficult to draw conclusions, some believe that in looking at the data that the subject field of the competitions is having a significant impact on the pool we are attracting. Naturally, this speaks to the importance of the selection of the subject field for CRC competitions. However, in some cases, even specifically targeting a specialty within the field that is known for higher representation of one (or more) of the underrepresented groups, has still not led to significant applications from that group. We will continue to watch this data and continue to try to find what lessons can be learned.

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
• Implement changes to the Process for Nominating and Accepting a Canada Research Chair	Summer/Fall 2022

Was funding from the CRCP EDI stipend used for this key objective?
- o **Yes**
- o 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.

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

$6000

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

- The amount was used on the salary for the Equity, Diversity, and Inclusion in Research Advisor. Specifically, they spent time on reviewing, recommending changes to the hiring process, designing the new documents and forms to be used in those documents, and implementing those changes.

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

- Insignificant impact (the institution could attain similar progress towards this objective without the EDI stipend)

- Minor impact (the EDI Stipend had minimal impact on achieving progress)

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

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

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

- Don't know

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		
2		

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 address the barriers:

- Continuing to ensure all members of hiring committees review the Canada Research Chair Unconscious bias training module. Confirmation of completion of training is required from all committee members.
- Continuing to ensure the recruitment and hiring process followed for Canada Research Chairs at UPEI strictly follows the Canada Research Chairs Program's "Requirements for recruiting and nominating Canada Research Chairs."
- Two CRC hiring processes began during the reporting period. This was the first opportunity to implement the process of involving equity champions on the hiring committees. Equity Champions were successfully identified in each hiring committee.
- EDI Officer provided support to equity champions in CRC hiring committees.
- Improved the self-identification form and process for the Canada Research Chair Program to reflect best practices. The revised form has a more encompassing gender identification section, and now collects sexual orientation information for the first time.
- Reconsidered the privacy protections around the self-identification information, remaining focused on the interests of FDGs. This included allowing the applicant some level of control over sharing the self-identification information with the hiring committee.
- Prepared a letter from the Vice President Academic and Research to CRC applicants, explaining the importance of self-identifying.

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

- The Equity, Diversity and Inclusion in Research Advisor met with current CRCs who identify as FDG to collect information about their progression through the recruitment and hiring processes. This allowed that information to be considered as process changes which were being considered.
- Equity Champions identified on each hiring committee.
- Review of the anonymous evaluation form for hiring committee members to assess effectiveness of equity, diversity, and inclusion training materials, and whether they felt able to put principles into practice.

Progress and/or Outcomes and Impacts made during the reporting period:

- UPEI has now completed nearly all of the actions in this Objective. This marks significant progress made.
- This was a period when a number of significant improvements were made to the hiring process. However, as the CRC hiring cycles were not completed in this year it is too early to assess how well those processes are working.

Challenges encountered during the reporting period:

- Two search processes were underway in this period, but neither was completed, so while process documents have been improved, they have not yet been tested to see if they work.
- While UPEI has been working diligently to build equitable processes and ensure there are pathways for FDGs, there has been great frustrations at the individual level, when individual candidates drop out of the process for reasons which often relate to systemic issues faced by those groups, but which are out of control of UPEI. This often relates to the size of Charlottetown, and restrictions this presents for meeting the various needs of the candidate's family. For example, the limitations on the employment opportunities available for spouses, and a childcare shortage. Even with staff working outside of scope to provide assistance with issues, sometimes Prince Edward Island is not able to meet the needs of the whole family, which has meant the diversity in the pools has dropped.

Next Steps (indicate specific dates/timelines):

• Continue to identify an Equity Champions on all Canada Research Chair hiring committees, positioned to provide guidance and ensure equity, diversity and inclusion remains omnipresent through the process. If it is not the Equity, Diversity, and Inclusion Officer, they will have the support of the Equity, Diversity, and Inclusion Officer.	Ongoing
• Equity Champion will provide the institutional EDI Officer, and Vice-President Academic and Research (which is responsible for academic functions and research services), with feedback regarding training needs, identified barriers to applying principles in practice, and recommendations for improvements.	Ongoing

Was funding from the CRCP EDI stipend used for this key objective?
- ○ **Yes**
- ○ 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.

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

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

- The amount was used on the salary for the Equity, Diversity, and Inclusion in Research Advisor. Specifically, they were involved with obtaining feedback from the current CRCs, and provided advice on the self-identification process.

EDI Stipend Impact Rating

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

- o Insignificant impact (the institution could attain similar progress towards this objective without the EDI stipend)

- o Minor impact (the EDI Stipend had minimal impact on achieving progress)

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

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

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

- o Don't know

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		
2		

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 address the barriers:

- Continuing to collect information through formal and informal means to determine areas of campus that would benefit from tailored equity, diversity and inclusion training.
- Introduced a requirement that all committees under the authority of the Research Advisory Committee mandate, are required to complete equity, diversity, and inclusion training (including unconscious bias). This includes committees that adjudicate processes for internal and external research grants, fellowships, and scholarship competitions that require internal review. Individuals must submit proof of completion.
- Developed the online, on-demand, training process to be followed to meet the above noted requirement, which includes an anonymous evaluation.
- Upon request the Equity, Diversity, and Inclusion Officer provided EDI training options to non-CRC hiring committees, and advice about how to infuse EDI principles into the hiring process.
- Introduced "4 Season of Reconciliation" a self-directed online educational learning module prepared by the First Nations University of Canada. The course is available to all faculty and staff, and was communicated to all faculty/staff by campus wide communication and has been promoted through various other channels.
- Continued to expand the myUPEI EDI "Resources for Researchers" page including new training for managing culturally diverse research teams, guidance for assessment of indigenous research, mentoring graduate students, information for incorporating EDI into research projects, among others.
- Significant investment by the University in Teaching Online a website for instructors for plan online course development. This website serves many purposes but includes information about building accessible and inclusive courses.
- Developed 1) EDI training for graduate supervisors, and 2) EDI training for graduate students.
- The myUPEI EDI page "Resources for Researchers" is now being promoted by the Research Services office through materials and by their staff, this has increased awareness of those resources by researchers.

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

- Several in person training sessions were held, particularly on the subject of interrupting harmful behavior.
- The myUPEI EDI site offers a growing collection of training, unfortunately we are unable to determine how many people are completing training at this time. Though the site saw 250 visitors in 2021.

Progress and/or Outcomes and Impacts made during the reporting period:
- The introduction of the EDI training process for all committees under authority of the Research Advisory Committee is a significant expansion of the required equity, diversity, and inclusion training. Prior to this, faculty had become aware that this type of training requirement was necessary for being involved in CRC hiring processes, but it had not expanded beyond those small circles. This expanded requirement was a significant step in normalizing EDI training requirements for various processes throughout the university.

- There is growing desire for equity, diversity, and inclusion training across campus. The number of requests to the EDI Office has been growing.

Challenges encountered during the reporting period:

- Developing quality, meaningful, impactful equity, diversity and inclusion training is time consuming. While the Equity, Diversity, and Inclusion Office has an ongoing time commitment to the development of training materials. The Office's production of training materials has been unable to meet the demand for training on campus.
- The myUPEI EDI is not able to track whether users are actually accessing the training made available through the site. A new platform was explored to better track training, but it presents a significant learning curve for the EDI Office. As the EDI Officer was planning to go off on a parental leave, and the other employee was on a term contract, the investment of time into the new technology was delayed until after the return of the EDI Officer.
- The Equity, Diversity, and Inclusion Officer was on parental leave in September 2021 – March 2022. Progress slowed while she was away from the Office. The Equity, Diversity, and Inclusion in Research Advisor continued during the first part of her leave.
- 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.

Next Steps (indicate specific dates/timelines):

- Review the feedback received trough the evaluation of EDI training.	Summer 2022
- Include equity, diversity, and inclusion training in the Human Resources Management Learning Series.	Spring 2022
- Provide tailored equity, diversity, and inclusion training for departments as capacity and need allows.	Fall 2022
- 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.	Spring 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.	Summer 2022
- Incorporate an EDI component into graduate students training.	Fall 2022
- Ensure equity, diversity, and inclusion training is provided to the Board of Governors and Senate.	Spring 2023

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

o 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.

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

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

- The amount was used on the salary for the Equity, Diversity, and Inclusion in Research Advisor. Specifically, they designed the training for graduate students and graduate supervisors.

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

   o Insignificant impact (the institution could attain similar progress towards this objective without the EDI stipend)

   o Minor impact (the EDI Stipend had minimal impact on achieving progress)

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

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

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

   o Don't know

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		
2		

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 address the barriers:

- Vice-President Academic and Research continued meeting on an ongoing basis (usually monthly) with all Canada Research Chairs, and the senior administrative positions associated with the CRC positions to ensure that Chairs are connected to networks, processes, and are positioned to become fully established within UPEI and to flourish in their roles.
- Released the UPEI EDI Strategy which includes as one of the five focus areas "Success of Faculty, Researchers, and Staff", within that section there are 5 categories of action: "1. Building diversity, and inclusion through equitable practices", "2. Employ best practices in equity, diversity, and inclusion in hiring processes", "3. Supporting faculty/staff for success", "4. Advancing equity, diversity, and inclusion in research", and "5. Bias-free processes". There are a total of twenty-one specific actions within these categories. Work has begun to advance towards these objectives and create a more equitable and inclusive environment for all faculty, researchers, and staff.
- Within this category it was our intention to 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, differentiated by discipline, with ranges for each kind of support, to reduce impact of negotiation. Ultimately it was determined that a document of this nature was not possible. The Equity, Diversity, and Inclusion in Research Advisor spent considerable time meeting with all Deans to assess hiring practices, and determining the resources that were available. Ultimately it was not possible to standardize the supports in any meaningful way. Each hiring was too unique, and the differences between faculties were quite dramatic. Instead, a new process for approaching the negotiation process was established, to take all steps possible to ensure that the process was proceeding without a significant impact

of systemic discrimination. These process updates were more fully explained under objective 1.

- Another action planned in this area was to provide each incoming Canada Research Chair with a resource bank package (tailored by discipline), indicating who can provide guidance and/or support on a range of relevant internal or external information or opportunities. Instead of preparing a document specific to CRCs, the EDI Office capitalized on an existing project that was planned with the Research Services Office. Specifically, the Research Services Office was undertaking significant revisions to the Research @ UPEI Start Up Guide. Therefore, this information was embedded into that document. This will ensure that it is available not only to CRCs but also all new faculty. It is also a more encompassing document that provides relevant information on a wide range of issues related to conducting research at UPEI.
- UPEI Research and Innovation Strategy to be updated to reflect an equity, diversity, and inclusion lens.
- Vice-President Academic and Research continues to work with Deans to encourage participation of Chairs in the Human Resources Management Series.
- The Human Resources Management Series included sessions on interrupting harm, harassment, and managing sick leaves.
- The EDI Officer started providing advice to hiring committees regarding how to hire personnel with the equity, diversity, and inclusion skills relevant to the position.
- Began encouraging all areas of campus to crease inclusive campus spaces.
- Added information about EDI to the New Faculty Orientation Session.
- Began encouraging and supporting all areas of campus to proactively make information available about common practices for meeting diverse needs.
- Began encouraging the inclusion of equity, diversity, and inclusion competencies as a factor in all committee composition.
- Hired a third-party consultant to conduct a review of accessibility of campus. The EDI Officer met with the consultants to provide input on the review. The EDI Officer brought forward information raised in previous consultation processes, to ensure the voices of underrepresented groups was heard in the process, with a particular focus on information related to accessibility that was raised by people who identified as having a disability. The Vice President Academic and Finance and Associate Vice President Facilities Management and Construction are tasked with making improvements where necessary.

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.
- Vice-President Academic and Research has continued the process of reviewing the annual reports provided by all Canada Research Chairholders. The VPAR meets with respective Deans to review the reports and make plans to support the CRCs to address concerns. Particular attention is given to any negative experiences experienced by those who identify as women, visible minorities, persons with disabilities, and/or Indigenous persons.
- Lessons have been learned from the meetings between the Vice-President Academic and Research and each Canada Research Chair, as well as senior administrative positions. The

intention of those meetings was to ensure CRCs are positioned to flourish in their roles. This has identified challenges and opportunities, in which the Vice President Academic and Research (with assistance from Deans and the Manager of Research Services) has been able to take a number of actions to better support the CRCs. Issues identified included challenges with: enabling access to a greater pool of graduate students, and navigating institutional procedures which were creating a hurdle to the administration of research.

Progress and/or Outcomes and Impacts made during the reporting period:

- The release of the UPEI EDI Strategy marked a turning point in the institution progress towards equity. There is now a foundation in place (with the creation of the Equity, Diversity, and Inclusion Office) and a clear path forward.
- Across campus work is being done to advance towards the action items outlined in the UPEI EDI Strategy.
- The EDI Office is working to build EDI into various existing processes across the institution.

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. The Equity, Diversity, and Inclusion in Research Advisor continued during the first part of her leave.
- With the EDI Officer away at the beginning of 2022, no one systematically collected information for campus wide EDI reporting under the UPEI EDI Strategy. That work was delayed until the return of the EDI Officer. Thus, we are behind in our efforts at campus wide reporting. However, this also means that it is likely that further positive steps occurred across campus in 2021 that are not yet known to the Vice President Academic and Research or EDI Office, but which are positively impacting faculty/staff and the CRCs at UPEI.
- While UPEI has made a significant stride forward with the release of the UPEI EDI Strategy, there is now a path forward identified. However, there is an incredible amount of work associated with making progress, and effort is needed across campus. While there is accountability built into the UPEI EDI Strategy, it will take time to make progress.
- The EDI Officer started provided guidance on how to hire personnel across the institution with the EDI competencies. However, it was recognized that resource documents were needed to assist hiring committees with implementing appropriate questions into the interview stage. While a standard approach was designed for faculty positions, a package with questions relevant to a wider range of positions is necessary. The EDI Office has a growing number of projects related to hiring that required research and development of guidance documents and found it difficult to find time to take on this project.

Next Steps (indicate specific dates/timelines):

• Hold an equity, diversity, and inclusion presentation as part of the Chairs and Deans Workshop.	Spring 2022
• Across the institution, begin hiring all personnel with the equity, diversity, and inclusion skills relevant to the position.	Spring 2023

• Making the process for faculty to pursue accommodations more transparent.	Winter 2023
• Ensuring that equity, diversity, and inclusion are part of the development of new and review of existing policies.	Summer 2021

Was funding from the CRCP EDI stipend used for this key objective?
- **Yes**
- 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.

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

$1500

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

The amount was used on the salary for the Equity, Diversity, and Inclusion in Research Advisor. The work in this category was done primarily by the EDI Officer, not funded through the stipend, but the Equity, Diversity, and Inclusion in Research Advisor provided assistance with small projects. Specifically, working with Research Services to embed information CRCs would need into their guidance documents.

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

- Insignificant impact (the institution could attain similar progress towards this objective without the EDI stipend)

- **Minor impact (the EDI Stipend had minimal impact on achieving progress)**

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

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

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

- Don't know

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		
2		

Key Objective 6

Brief description of S.M.A.R.T. (specific, measurable, aligned with the wanted outcome, realistic and timely) Key Objective 6:

NA

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

NA

Corresponding actions undertaken to address the barriers:

NA

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

NA

Progress and/or Outcomes and Impacts made during the reporting period:

NA

Challenges encountered during the reporting period:

NA

Next Steps (indicate specific dates/timelines):

NA

Was funding from the CRCP EDI stipend used for this key objective?
- o   Yes
- o   **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.

NA

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

NA

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

NA

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

- o   Insignificant impact (the institution could attain similar progress towards this objective without the EDI stipend)

- o   Minor impact (the EDI Stipend had minimal impact on achieving progress)

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

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

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

- o   Don't know

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		
2		

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

One of the significant shifts that happened with Covid-19 was a shift to online learning. The University invested in resources to assist faculty with moving to online teaching. Information and resources were provided to faculty to ensure that online courses were done in a way that was equitable and inclusive. There was a real shift in how we think about teaching and learning. However, though information was provided it is not widely known how effective instructors were at building inclusive courses.

One issue that has been both an opportunity and a strength, is that the EDI Officer who is widely known on campus and has respect from senior administrators, is being consulted on a range of projects. This has undoubtably been positive in working towards EDI on campus. The EDI Officer is able to provide guidance on projects as they are happening. This is effective and efficient. It also allows the EDI Officer to have increased impact, as other people are carrying out the work of undertaking the projects, she is not expected to complete the work, but rather advise on the direction. However, there is so much interest in advice from the EDI Officer, that it is difficult for her to find time to take on large scale projects that require dedicated time.

Another challenge has been the amount of time it takes to build quality training materials. The EDI Office has at various points in the past tried to reach out to other university EDI offices to try to request materials they are using. There have been a few instances where that has worked very well, and offices were happy to provide materials. Overall, we have had limited success in leveraging materials prepared by other universities. Many universities have their training offerings only visible to faculty/staff, so we are unable to see what is being offered. Some requests for access to presentations have simply gone unanswered or were potentially forgotten. We will continue efforts in this area, but as a small university it is difficult to meet the demand for training. We welcome suggestions for how to overcome this obstacle, or the sharing of any training materials by the CRC or larger universities with more mature EDI offices.

A significant opportunity was the grant from CRC. This allowed us to recruit and hire an Equity, Diversity, and Inclusion in Research Advisor. It allowed significant dedicated time towards large projects.

One best practice that was discovered was the effectiveness of presenting material to the university community based on role. Specifically, the myUPEI EDI site offers some ability to track what resources users to the site are interacting with. The site was designed to engage visitors in more than one way. One section of the page includes resources divided by topic, i.e. accessibility, cultural differences and anti-racism, sexual and gender diversity, etc. Within those categories users can find additional information and resources to learn about those topics. A separate area of the site was designed to meet the needs of specific users. The first group was researchers, with the creation of a section "Resources for Researchers" where information that is relevant to the needs of that group is collected and divided into categories. Specifically, the categories for that page are: Guiding Principles and Documents, Training, Best Practices, Grant Application, and Other Resources. The brief description of

the resources available also explains the relevance of the resource to the group. For example, the online cultural dexterity training is described as being particularly relevant to faculty who manage diverse research teams. The same cultural dexterity training is in both sections of the site under "Cultural Differences" and under "Resources for Researchers: Training". The site statistics demonstrate that the presentation of material in the role-based site is dramatically more popular. The EDI Office posited that this would be a more effective way to engage with users, as many people do not feel they have a deficit in a topic area but accept and identify with their role. The theory was that people would have difficulty seeing "Cultural Differences" and thinking it was relevant to them, because most people think they are good at working with people from other cultures already, and would not accept they need training. When the same training is presented as relevant to researchers, and researchers review the list of training someone else believes is relevant to them, and the training is described as relevant to someone who has a diverse research team, people are able to identify that and then can do training because they have a diverse group employees, rather than because they specifically have a deficit in their ability to work with other cultures. As this strategy has been effective, the EDI Office will be continuing to expand the role-based information and presenting information in this way.

PART C. REPORTING ON EDI STIPEND OBJECTIVES NOT 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 thibs section to report on EDI Stipend objectives.

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:

Defined process / guide directing all faculty and administrative processes in the CRC selection process, with standardized approaches to support for CRC differentiated by discipline, including the full education package with details on how to address EDI in the process, required to complete by each participant in the process.

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

Detailed and updated reference manuals available.

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

The Equity, Diversity, and Inclusion in Research Advisor revised the process for hiring a CRC. The most substantial changes to the process were about the point when the CRC has been selected by the hiring committee, and the process moves to a negotiation between the candidate and the Dean about actually coming to UPEI. This was identified as an area requiring work, because there was essentially no structure around how it occurred. While the entire process for hiring a CRC is set out in detail, the negotiation stage between the Dean and the candidate, was one bullet point in a document. This stage involves determining the salary, startup funds, space available, relocation supports, and other issues. Previously this was left to each Dean to navigate. While budgets available and some rules in the collective agreement were relevant, in large part this was left to the two individuals involved. Depending on the particular Dean and candidate involved, wide variation in results could be experienced. The new process includes a framework for this process. It is hoped that the framework will minimize the impacts of systemic discrimination. Specific documents include: proposed revisions to the Process for Nominating and Accepting a Canada Research Chair, new Canada Research Chair Hiring Guidelines, a new Negotiation Worksheet, and a new Letter to Candidates (explaining critical information that the candidate should be aware of going into negotiations).

The Equity, Diversity, and Inclusion in Research Advisor began work on this project in February 2021 and completed the project in July 2021. Documents were provided to the Deans involving in current hiring cycles, but those processes had not reached the negotiation with candidate stage by the end of 2021.

The new process has not been fully implemented, so the products have not yet been tested.

Outline the total expenditures below:

Total funds of EDI stipend spent on the objective:	$20,000
Institutional commitment (if applicable):	

Total funds spent: $20,000

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

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

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:

- o   Insignificant impact (the institution could attain similar progress towards this objective without the EDI Stipend)

- o   Minor impact (the EDI Stipend had minimal impact on achieving progress)

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

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

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

- o   Don't know

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

The amount was used on the salary for the Equity, Diversity, and Inclusion in Research Advisor who completed this work.

Do you have other objectives to add?
- o   **Yes**
- o   No

Note: If you select "Yes" you will be brought to a separate section where you may enter information for up to five additional objectives and where, at minimum, you will be required to enter information for Objective 2 in order for that section to be considered complete. Otherwise, if you select "No", you will not be directed to the section for additional objectives and, therefore, will not have access to Objectives 2 through 6, , in which case, completing the information for Objective 1 will be sufficient.

PART C. ADDITIONAL OBJECTIVES

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:

Analysis of data from employment systems review relating to past hiring committees involved or influencing CRC recruitment and retention; to address fact that there are few CRCs at a small university, include recruitment and retention practices of senior faculty, administrators, and staff. Determine the appropriate action items to take forward from employment systems review.

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

Identified actions for changes to hiring and retention practices for CRCs and all faculty / staff hires.

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

In May and June 2021, the Equity, Diversity, and Inclusion in Research Advisor conducted analysis on the relevant information from the previously conducted consultation periods. Recommendations were made to the hiring process for CRCs. Most of those changes were implemented in August 2021. Information related to staff hires more generally was kept by the Equity, Diversity, and Inclusion Office for use in later projects related to review of employment systems at the University more generally.

Outline the total expenditures below:

Total funds of EDI stipend spent on the objective:	$3,000
Institutional commitment (if applicable):	

Total funds spent: $3000

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

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

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:

- o Insignificant impact (the institution could attain similar progress towards this objective without the EDI Stipend)

- o Minor impact (the EDI Stipend had minimal impact on achieving progress)

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

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

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

- o Don't know

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

The amount was used on the salary for the Equity, Diversity, and Inclusion in Research Advisor who completed this work.

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:

Develop a training and communication strategy to connect EDI with research excellence and improve awareness and action regarding systemic barriers.

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

Training and communication materials developed. Feedback from affected people.

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

The Equity, Diversity, and Inclusion in Research Advisor developed two training sessions: Equity, Diversity, and Inclusion for Graduate Students, and Equity, Diversity, and Inclusion for Graduate Supervisors. Both presentations address the relationship between equity, diversity and inclusion and better research outcomes. Work on the project began in February 2021 and ended August 2021. Though the material was designed for those two specific groups, it is intended that portions of the materials will be used in other EDI presentations across the university more generally.

Impact of that work has not yet been measures, as they are scheduled to be used in 2022.

Additional information about the connection between research excellence and EDI was also added to the myUPEI EDI page, specifically the "Resources for Researchers". That page is divided into categories: Guiding Principles and Documents, Training, Best Practices, Grant Application Information, Other Resources, and Suggestions and Feedback.

Outline the total expenditures below:

Total funds of EDI stipend spent on the objective:	$11,000
Institutional commitment (if applicable):	

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		
2		

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:

- o Insignificant impact (the institution could attain similar progress towards this objective without the EDI Stipend)

- o Minor impact (the EDI Stipend had minimal impact on achieving progress)

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

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

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

- o Don't know

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

The amount was used on the salary for the Equity, Diversity, and Inclusion in Research Advisor who completed this work.

EDI Stipend Objective 4

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:

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

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

Outline the total expenditures below:

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

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		
2		

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:

o Insignificant impact (the institution could attain similar progress towards this objective without the EDI Stipend)

o Minor impact (the EDI Stipend had minimal impact on achieving progress)

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

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

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

o Don't know

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

EDI Stipend Objective 5

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:

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

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

Outline the total expenditures below:

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

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		
2		

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:

- o Insignificant impact (the institution could attain similar progress towards this objective without the EDI Stipend)

- o Minor impact (the EDI Stipend had minimal impact on achieving progress)

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

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

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

o   Don't know

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

EDI Stipend Objective 6

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:

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

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

Outline the total expenditures below:

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

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		
2		

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:

- Insignificant impact (the institution could attain similar progress towards this objective without the EDI Stipend)

- Minor impact (the EDI Stipend had minimal impact on achieving progress)

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

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

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

- Don't know

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

PART D. ENGAGEMENT WITH UNDERREPRESENTED GROUPS

Outline how the institution has engaged with underrepresented groups: e.g. racialized minorities, Indigenous peoples, persons with disabilities, women, LGBTQ2+ 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)

The previous reporting period included significant consultation. Two consultation processes and hundreds of people were involved in those processes, which included significant efforts to engage underrepresented groups. That work was previously reported on. This was a period of time when we were carrying forward actions from what was learned through those earlier processes. With limited human resources in the EDI Office, significant efforts at consultation can not occur every year. However, the data from the previous consultation processes has been carried forward.

The qualitative data from the previous consultation periods was previously organized into five themes with approximately 90 subcategories. One version of that document lives as a point in time document, that was used for developing the EDI Strategy. A second version of that document has been carried forward as a living document. From time to time, the EDI Office receives input about issues from members of the university community. In almost all cases this is about a specific issue, very often from a member of an underrepresented group, who is deeply impacted by that issue. While those emails receive responses from the EDI Office, typically they contain detailed information about complex issues at the University. The EDI Office removes any personally identifying information from that correspondence and adds it to the consultation feedback. This allows the EDI Office to maintain a living document of feedback. Then as the EDI Office works on various projects, they are able to return to the data and review the individual voices and concerns. This allows the EDI Office to continue to be informed by the voices of the community, even though they do not have the capacity to consult with the community as part of the individual projects.

Only small-scale consultation with FDGs was specifically undertaken in addition to the previous work. The Equity, Diversity, and Inclusion in Research Advisor met with CRCs who identify as FDGs. This was done to inform the changes that were being made to the hiring processes.

As the EDI in Research Advisor was new to the EDI Office and was undertaking significant changes to the CRC hiring processes, they were directed to review the sections of the consultation document which related to their work.

PART E. OTHER EDI INITIATIVES

Efforts to Address Systemic Barriers More Broadly within the Institution

Briefly outline other EDI initiatives underway at the institution (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 possible. 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)

UPEI EDI Website - https://www.upei.ca/equity-diversity-and-inclusion

CANADA RESEARCH CHAIRS PROGRAM (CRCP) INSTITUTIONAL EQUITY, DIVERSITY AND INCLUSION (EDI) ACTION PLAN AND EDI STIPEND REPORT

UPEI EDI Strategy - https://files.upei.ca/edi/upei_edi_strategy.pdf

The previous reporting period was a time in which we could describe the tone of the year as "foundation building". Now, in 2021, we have shifted, and this is the year when EDI became an established presence at UPEI.

The launch of the UPEI EDI Strategy marked a moment of shift. It was a significant achievement for the University. Prior there was action on EDI, but it was disconnected and siloed. Now, the direction forward is clear. Action items are identified. There is a growing understanding that our commitment does not amount to a one-off event, but rather is about actively infusing our work with EDI at every stage. There have also been moments when people have reckoned with events of the past, and reflected upon the damage that past actions have on the impact of our environment today. There is a deep understanding that moving forward positively, means living EDI every day. The end of 2021 felt like UPEI may be at a precipice, having now acknowledged the importance of EDI and established a presence for how we can move forward. The challenge as we move forward will be seeing if we can take the structure we have built, use the momentum that is present, and find a way to tangibly commit to undertaking the work that is necessary to move the institution forward.

The below is an incomplete list of activities that reflect some of the work in EDI across campus:

- Continued to expand online training available through the myUPEI EDI page. Including new training on interrupting harmful behaviours. A sizable collection of training is now available to instructors for incorporating EDI into teaching (i.e. accommodation processes for students, universal design for learning, online learning, privilege and bias, and decolonization).
- UPEI announced the creation of a brand-new Faculty of Indigenous Knowledge, Education, Research, and Applied Studies.
- Created a new position – Advisor to the Vice President Academic and Research on Indigenous Affairs, and the new person has begun various projects.
- UPEI set a commitment to prepare an indigenization strategy and has identified the path forward for preparing the strategy.
- EDI was actively embedded into quality assurance review processes for all programs.
- The Health Center is providing specialized care to meet the needs of gender-diverse people from the campus community and greater Island community.
- Implemented a new diversity and inclusion statement on all staff and student job ads that is updated and aligned with best practices.
- Library lead a provide wide reading group related to the BIPOC experiences.
- Began adding equity champions, and a requirement to have EDI competencies, as a factor in the creation of various university committees.
- Accessibility Review was conducted by a third-party consultant.
- Became a signatory to the *Scarborough Charter on Anti-Black Racism and Black Inclusion in Canadian Higher Education: Principles, Actions and Accountabilities*
- UPEI EDI Steering Committee meeting on a regular basis.
- A practice of requesting applicants for faculty positions to include an equity, diversity, inclusion and reconciliation statement connected to teaching and research began in the Faculty of Engineering, is gaining popularity amongst hiring committees.
- An increasing number of people are reaching out to the EDI for advice on their job postings to remove systemic barriers unconsciously embedded.
- In December 2021 Rubin Thomlinson LLP were retained to conduct an independent external third-party review of the University's workplace policies and practices with respect to harassment

and discrimination and an investigation of allegations that were brought to the University's attention concerning the former president.

- Celebrated Bell Let's Talk, a week of events about mental health, and Love and Sex Week, a week of events to talk about healthy relationships and dating.
- Managers received training on harassment.
- Became a member of the Atlantic Promise Scholars initiative, aimed at increasing diversity in business schools.

REVIEW

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

○ I would like to go back to the table of content to modify some of my answers.

○ I have reviewed my responses and I am ready to submit my report.

A reminder that institutions are required to post a copy of this report (as submitted) on their public accountability and transparency web pages within 7 working days of the deadline for submitting the report to TIPS.

END

This information will be sent to the Tri-agency Institutional Programs Secretariat when you click 'Submit.'