UNIVERSITY OF CALGARY

Office of the Vice-President (Research)
Office of Equity, Diversity and Inclusion

CANADA RESEARCH CHAIR PROGRAM
Equity, Diversity and Inclusion Action Plan and Stipend Report

December 2023

Territorial Land Acknowledgement

The University of Calgary, located in the heart of Southern Alberta, both acknowledges and pays tribute to the traditional territories of the peoples of Treaty 7, which include the Blackfoot Confederacy (comprised of the Siksika, the Piikani, and the Kainai First Nations), the Tsuut'ina First Nation, and the Stoney Nakoda (including Chiniki, Bearspaw, and Goodstoney First Nations). The City of Calgary is also home to the Métis Nation of Alberta (Districts 5 and 6).

The University of Calgary is situated on land Northwest of where the Bow River meets the Elbow River, a site traditionally known as Moh'kins'tsis to the Blackfoot, Wîchîspa to the Stoney Nakoda, and Guts'ists'i to the Tsuut'ina. On this land and in this place, we strive to learn together, walk together, and grow together "in a good way."

"Our laws come from the land, and our practices of granting rights and privileges is a process we were born with, that ties us to this land."

Piikani Elder Dr. Reg Crowshoe, Hon. LLD'01, Cultural Advisor at UCalgary

University of Calgary Canada Research Chairs Program:
Equity Diversity and Inclusion (EDI) and Stipend Report (2022-2023)

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 (June 30, 2022) 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.

Name of Institution: University of Calgary

Contact Name: Dr. Malinda Smith

Position Title: Vice-Provost, Associate Vice-President Research (Equity, Diversity and Inclusion)

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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.

Indicate what your institution's key EDI objectives are (up to six) as outlined in the most recent version of your action plan, as well as the systemic barriers/challenges identified that these objectives must address. Please note that objectives should be S.M.A.R.T. and include a measurement strategy. List the corresponding actions and indicators (as indicated in your institutional EDI action plan) for each objective, and outline: a) what progress has been made during the reporting period; b) the main actions were undertaken (up to six) and how they have progressed; c) the data gathered; and d) indicators used to assess the outcomes and impacts of the actions. Please note that indicators can be both quantitative and qualitative and should be specific. Outline next steps and use the contextual information box to provide

The University of Calgary is strengthening its commitment to equity, diversity, inclusion, and accessibility. This commitment is evident in intentional actions to meet and exceed priorities laid out in the stated objectives.

1.2.1 Processes
Objective: Our institutional framework for chair allocations, recruitment and nominations will embed equity, diversity, inclusion, and accessibility considerations at all stages of the process, and will be based on best practices for inclusive awards, prizes, and honours.

Systemic barriers: Research and experience have highlighted the ways in which standard academic selection and recognition practices reinforce patterns of bias and discrimination that limit opportunities for members of equity-deserving groups, including but not limited to women, Indigenous peoples, persons with disabilities, and visible/racialized minority persons.

Actions:

- 1.2.1.1 Since 2017, an equity recruitment plan has been required for each CRC search: These plans are now specific to the given discipline, set applicant pool targets based on available talent, designate an EDI champion, and draw on equity gap data analysis to close current equity gaps. It will be prepared by the given Faculty with guidance from an EDI team from the VPRO, Human Resources and the Office of Equity, Diversity and Inclusion (OEDI): the Institutional CRC EDI Advisor, the EDI Advisor in Research Services Office and the Vice Provost and Associate Vice President Research (EDI). An institutional sub-committee chaired by our AVP Research EDI with the Equity Officer or designate will review each plan, taking into account the research assessment, evidence, and perspectives from each of the FDGs, and will make recommendations for implementation.

- 1.2.1.2 In mid-2018, HR developed a CRC equity recruitment toolkit and in 2021-2022 the VPRO and OEDI developed the EDI in Research Plan. In addition to Equitable and Inclusive Hiring training and unconscious bias mitigation sessions, search committees will be provided online resources, tip sheets and information sessions for CRCP recommended best practices. These include proactive talent identification and recruitment strategies for FDGs, establishing evaluation criteria and assessment grids, and assessing circumstances that could affect productivity such as career interruptions. This toolkit will be reviewed and updated at minimum on an annual basis.

- 1.2.1.3 As of December 2017, the Research Services Office, VPR Office and the OEDI have worked together to ensure ongoing compliance with CRCP requirements for all new nominations by compiling and reviewing evidence demonstrating equity recruitment conducted prior to nomination submission. An institutional sub-committee chaired by our Equity Officer or designate and including perspectives from each of the FDGs will review each recruitment package.

- 1.2.1.4 Review of EDI best practices: Beginning in 2017, the Office of Diversity, Equity and Protected Disclosure—now the Office of EDI—will conduct an annual review of current literature, policies and internal data to inform refinements to our institutional CRC EDI framework. This will include revisions, as appropriate, of our self-identification processes to address each equity deserving group, including disaggregated data.

Data gathered and indicators: Equity recruitment indicators for applicant pool diversity and candidate selections are reflective of the targets established in equity recruitment plans for each.

Outcomes and impacts made during the reporting period:

- **CRC Equity Recruitment Plan:** As noted in previous reports, every CRC allocation request submitted by a faculty must be accompanied by an equity recruitment plan. The RSO EDI Advisor conducts a review and provides a summary report to the Vice Provost and AVPR-EDI, which they discuss together before issuing a ranking by consensus and offering detailed feedback on each plan to recognize strengths and outline opportunities for future recruitments. These evaluation and feedback documents are also reviewed by the Vice President (Research) in the allocation decision process. Once a faculty is allocated a chair, the recruitment plan is shared with the HR specialist in Talent Management supporting the search for implementation.

- **CRC Equity Recruitment Toolkit: I**n 2018, the University developed a toolkit for those involved in the recruitment and selection of CRC positions. While focused on the CRCP, this annually updated toolkit weaves equitable and inclusive practice across all aspects of recruitment, and touches on legislative requirements, institutional policies, and practices, as well as the CRCP's recommended equity, diversity, and inclusion practices. Each CRC committee is provided wrap-around and continuous support from a coordinated team of specialists from the Offices of EDI, Research and HR, beginning with Equitable and Inclusive Hiring training jointly facilitated by specialists from OEDI and HR all the way through to detailed feedback from the Vice Provost and AVPR-EDI on each recruitment. Academic selection committees also have access to resources throughout the selection process, including applicant pool diversity reports, tips sheets, and information on CRC targets and recruitment requirements. If needed, the HR specialist consults with the EDI Advisor in the Research Services Office to jointly form recommendations and strategies based on best practices and responsively assist committees to implement best practices at each stage of recruitment.

- **CRC Recruitment Process Summary:** The process by which CRC recruitments are evaluated has gained added rigour and accountability. A required formal summary of each CRC Recruitment Process was implemented in 2020 and has undergone significant revisions with the goals of augmenting integrity of process and transparent, accountable process documentation. Under the direction of the Vice Provost and AVPR-EDI, updates to the form now elicit detailed information regarding diversity in committee composition; role of the EDI champion; Equitable and Inclusive Hiring training and guidance provided; steps taken to identify and actively recruit members of the FDGs; evaluation of traditional and non-traditional impact metrics using Declaration Of Research Assessment (DORA) principles; comparative information regarding chairholder supports offered; and a CRC recruitment process compliance form signed by all committee members. An EDI Advisor reviews these forms for each search and provides a report to the AVPR-EDI. Together they discuss, solicit further detail from hiring committees where needed, and assign a final evaluation noting compliance with CRC requirements, and offering feedback and ideas for the implementation of best practices in future recruitments. The new mid-point attestation form is only sent to the Secretariat when all aspects of the recruitment are deemed by the Vice Provost and AVPR-EDI to meet CRC requirements. Finally, a robust reporting and evaluation process has also facilitated an improved feedback loop through which hiring units are continually receiving documented

feedback from the EDI Advisor and Vice Provost and AVPR-EDI to inform improvements to practices with each subsequent recruitment process. The information gained through this review process also informs a broader education loop by which exemplary practices in recruitment and areas for improvement alike can be introduced in earlier stages of committee education.

- **Reviews of EDI best practices:** A cross-unit institutional CRC-EDI Working Group convenes monthly to discuss current and emerging best practices as they inform various aspects of program implementation and faculty and candidate support. While the group's initial mandate and direction come from the VPR and the Vice Provost and AVPR-EDI, this group deepened and diversified its expertise by formally including the OEDI's Senior Education Specialist, whose EDI expertise and involvement in CRC Selection Committee training greatly enriches the Working Group. The linkages across HR, Research Services and the OEDI at the operational level greatly enhance the sharing of EDI promising practices across educational, administrative, and operational aspects of the institutional CRCP.

- **Challenges:** Challenges are noted in Part B as they were common to all actions.

- **Next steps:** Various current institutional initiatives and roles support the continued identification and dissemination of promising practices to embed EDI in excellence across the research ecosystem. Increased capacity building in this regard is enabled through the self-assessment activities of the Dimensions pilot program, and culminated in the UCalgary being recognized with a Construction Award in 2023; the partnership across EDI leads realized through the Faculty EDI (FEDI) Committee, which is overseen by the Vice Provost and AVPR EDI; the Plan for EDI in Research and Teaching Awards (adopted as an institutional plan in summer 2022) and its inclusive consultation process; and continued work by the CRC-EDI Working Group to improve training, resources, and evaluation around all aspect of the institutional CRC program. As well, in 2022 the UCalgary launched the Presidential Task Force on EDIA with a Working Group on EDI in Research, which will help to consolidate these initiatives.

Was funding from the CRC EDI Stipend used for this key objective?
No

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

If an amount was entered in the previous question, indicate specifically what the fund were spent on:
N/A

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

1.2.2 Support Systems
Objective: Positive support structures and services will be made available to all chair holders.

Systemic barriers: A lack of networks, sponsors, and mentors, and increased service workload (e.g. "ivory tower of service work" and "equity tax") often assigned to underrepresented members of equity-deserving groups pose additional barriers to some chairholders and the overall chair program success.

Actions:

- 1.2.2.1 CRC onboarding: By fall 2019, all new chair holders will be advised by the new CRC Equity Advisor, working with the Vice Provost and AVP Research (EDI) and Human Resources, about EDI and accessibility initiatives, networking and development opportunities, events and leadership programs available to them and of the process for protected disclosure. The CRC Equity Advisor will also work with each chair holder on a case-by-case basis, in coordination with Human Resources and the home Faculty, to develop necessary accommodations including specialized resource allocation for persons with disabilities.

- 1.2.2.2 Mentoring: Faculties are required to submit mentorship plans with each new candidate nomination, committing to expectations for, and facilitation of, career progression and successful chair renewal. Additionally, a new central mentoring framework was developed in 2019/20 specifically for CRCs with voluntary participation. The model is flexible, with one-to-one, group and network dimensions and will address the unique pressures and expectations for our CRCs. Rather than a one-size-fits-all approach, we are prioritizing a novel Equitable Pathways approach first initiated by the OEDI that focuses on the quantitative and qualitative data and lived experiences of members of each of the FDGs as well as LGBTQ2S+ persons. All new CRCs will have the opportunity to develop a personalized program tailored to their needs and aspirations.

- 1.2.2.3 Administrative support: In response to chair holder needs, investment of more than $500k (annual) is allocated to our central Integrated Service Centre to provide enhanced services related to university HR, finance and research systems support. Through a new USER Task Force CRC focus group starting in 2019/20 (Appendix A10), chair holder consultation will ensure the most effective definition and delivery of such services.

- 1.2.2.4 System safeguards: Administrators associated with chair holder development and career progression will be made aware of systemic inequities as well as unconscious biases, gender-based analysis (+), intersectionality, and potential adverse impacts of these on decision making; they will be advised on appropriate safeguards to ensure members of FDGs are not disadvantaged in negotiations for institutional support.

- 1.2.2.5 EDI Surveys: Regular confidential self-ID surveys of chair holders will continue to identify any ongoing barriers for the FDGs, inform the need for new actions, and track progress in sustaining a healthy environment for the FDGs. As well, the University's new EDI Data Operating Standard developed by OEDI and Legal will further build confidence in EDI data collection, analysis and reporting

Data gathered and indicators: Chair holder access to institutional resources and development opportunities, as noted by responses to the annual chair holder survey, as well as ongoing interviews with faculty leadership and focus groups.

Outcomes and impacts made during the reporting period:

- **CRC Onboarding:** While our commitment remains strong, individualized coaching for new chair holders on networking, development opportunities, and leadership programs has not yet been implemented due to the pandemic and staffing challenges but will be initiated in 2024 (see challenges below). Processes for the development and coordinated communication of campus-wide EDI and accessibility initiatives, networks and support structures are in development through the new Office of EDI and the Dimensions Pilot Project. All new CRCs are invited to attend the bi-annual new academic orientation. Because the majority of newly hired academic staff (including chairholders) were working remotely in 2022-2023, these sessions were still offered in hybrid form.

- **Mentoring:** Details of faculty-level mentoring plans and commitments are submitted as part of candidate review and recruitment process documentation, which is reviewed by an EDI Advisor and Vice Provost and AVPR-EDI and kept on file with RSO. To confirm adequate mentorship support for nominees, hiring units may be requested to submit greater detail regarding the mentorship plan. The central institutional mentoring framework has not yet been established but will be revisited in 2024.

- **Administrative support:** While chairs continue to receive assistance from the Integrated Service Centre and the Office of Research Services' chair specialists, more detailed information regarding adequate administrative and other supports was gathered through a chairholder survey administered in March 2023, and additional data will be gathered through subsequent chairholder focus groups. The Recruitment Process Summary Form, which captures all available supports offered to candidates at the recruitment stage, was revised to solicit added detail from faculties regarding equitable access to administrative support and clear justifications where supports offered differ among chairs.

- **System safeguards:** All communication from Research Services and the VPRO to faculty administrators related to CRC recruitment, career development and progression continues to champion the mitigation of barriers and biases as central to institutional culture and accountability. The University's Vice Provost and AVPR-EDI joined the SUPPORT Chairs committee in 2021, bringing further EDI expertise and leadership to the review of CRC allocations, nominations, and renewals. Due to the persisting challenges of COVID-19 through 2022-2023, most EDI literacy and learning remains offered in a virtual format. The Offices of Equity, Diversity and Inclusion, HR Research Services broadened the focus of the bias mitigation and academic training offered to each CRC academic selection committee to focus on equitable and inclusive hiring. This training is now available for all academic hiring committees. As part of the onboarding process, all staff in the Office of the Vice President (Research) attend the Office of EDI's Basics of EDI training and the Office of Indigenous Engagement's Beginning the Journey Towards Reconciliation training. A significant number of Research Services administrators have also completed the Canadian Association of Research Administrators' EDI Certificate and OCAP or Indigenous Relations Training Program education. Additionally, feedback from the EDI Advisor and Vice Provost and AVPR-EDI to faculties on each recruitment process often includes specific guidance to strengthen knowledge and implementation of best practices in all aspects of recruitment and support, particularly in aspects of start-up supports (mentorship, research

stipends, access to equipment and infrastructure, etc.) that proactively address known barriers to members of the FDGs.

- **Surveys and focus groups:** In acknowledgment of the challenges related to COVID-19 which include concerns related to time and remote relationship-building for effective consultations, as well as survey fatigue and anticipated low response rates, the annual chairholder survey was delayed to March 2023, with data to be available in fall 2023. As intended, this survey will be routinized for data collection every two years, with demographic information collected in alignment with CRC's data to ensure proper benchmarking. Both quantitative and qualitative data were collected within that survey, which followed from seven pilot interviews with chairholders completed by the EDI Advisor in fall 2021. The interview protocol and all data and administrative steps underwent review by the institution's EDI Data Collection Working Group (a joint group comprising offices of the Vice Provosts EDI, Indigenous, Planning and Resource Allocation, University Registrar, Human Resources, Research and FOIP) to ensure compliance with the highest standards of data governance, including privacy and confidentiality. The CRC-EDI Stipend was used to hire a consultant who will carry out our further qualitative data gathering and analysis.

- **Challenges:** Challenges are noted in Part B as they were common to all actions.

- **Next steps:** Several current undertakings will inform next steps with respect to approach to CRC onboarding, communication of system safeguards and climate surveys or focus groups. A portion of our CRC EDI stipend will be used to support an external EDI consultant that will undertake data collection and analysis to better understand the persistence of systemic barriers and issues faced by chairholders. All aspects of this data collection, analysis and recommendations will comport with the highest standards of data management and governance, and with the utmost respect for chairholder privacy and confidentiality

Was funding from the CRC EDI Stipend used for this key objective?
No

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

If an amount was entered in the previous question, indicate specifically what the fund were spent on:
N/A

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

1.2.3 Achieving Equity Targets
Objective: We will meet or exceed institutional equity targets and goals by the deadlines.
Systemic barriers: The lack of diversity in the academic workforce and lack of equitable pathways for success for members of equity-deserving groups is reflected in, and amplified by, the lack of diversity in CRCs.

Actions:
- 1.2.3.1 Appointment of three Indigenous chairs: To support our institutional Indigenous Strategy, three CRCs have been allocated to Indigenous research areas for priority hiring of Indigenous candidates.

- 1.2.3.2 Internal retention: Three CIHR CRCs have been allocated for appointment of internal women chair holders.

- 1.2.3.3 Equity recruitment practices will be enforced for all CRC hiring committees: A more rigorous equity framework is expected to increase the representation of members from the four FDGs groups – women, Indigenous peoples, persons with disabilities, and visible/racialized persons and LGBTQ2S+ persons.

- 1.2.3.4 Where necessary, proactive measures such as prioritizing the hiring of members of FDGs will be implemented to close diversity gaps until targets are achieved.

- 1.2.3.5 If necessary, options will be pursued to create additional chair allocations (using flex moves or other options) for prioritized allocation and hiring of FDGs to achieve targets.

Data gathered and indicators: Representation of the FDGs in our CRC allocations

Outcomes and impacts made during the reporting period:

- 2022 equity targets for all four of the FDGs (women and gender equity-seeking groups, racialized individuals, persons with disabilities, and Indigenous peoples) were met or exceeded.

- Prioritized hiring of members of the FDGs has been implemented to close gaps as part of our equity targets.

- Equity recruitment practices have been undertaken for all CRC hiring committees and the increasingly rigorous equity framework continues to increase the representation of members of all of the FDGs among applicant pools and chairholders. Please see progress areas in Section 1.2.1. and Section B Opportunities for more details regarding the use of best practices in equitable and inclusive recruitment, and the availability of institutional data to facilitate data-informed and accountable recruitment.

- **Challenges**: Challenges are noted in Part B as they were common to all actions

- **Next steps:** Through continuous improvement of our proactive talent identification, and inclusive recruitment and nomination practices, we will meet or exceed the CRC equity targets set for 2025, 2027 and 2029.

Was funding from the CRC EDI Stipend used for this key objective?
No

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

If an amount was entered in the previous question, indicate specifically what the fund were spent on:
N/A

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

Part B - Challenges and Opportunities

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)

Opportunities

- In August 2020, Dr. Malinda Smith joined the University of Calgary as the inaugural Vice-Provost (Equity, Diversity and Inclusion), launching the new Office of EDI. In 2021 the Vice-Provost EDI was cross appointed as the Associate Vice-President Research (EDI), bringing significant leadership and supporting synergies across institutional areas and activities of EDI action. Eleven of the fourteen faculties at the University of Calgary have established EDI leads, all of whom participate in the University's Faculty Equity, Diversity and Inclusion (FEDI) Committee, chaired by Dr. Smith. As one of 17 selected institutions participating in the Dimensions Pilot, the University conducted a comprehensive environmental scan, expanded data collection, and comprehensive self-assessments through its Parallel Paths and Equitable Pathways working groups for each FDG and LGBTQ2S+, in addition to working groups for EDI Data and the Language of EDI, respectively. The in-depth and comprehensive self-assessments in each area directly inform improvements to our CRC EDI Institutional Action plan and our institutional commitment to intersectional, equitably designed, and responsive actions that recognize the specificity of barriers faced by each equity-deserving group.

- The Office of Equity, Diversity and Inclusion has developed an in-depth inclusive hiring workshop which will be available to all academic hiring committees, including CRC selection committees delivered in partnership with HR. CRC's best practices for EDI in recruitment, hiring and retention are regularly referenced and mobilized in other hiring settings such as the Canada Excellence Research Chairs (CERC) selection process, and in the development of EDI action plans by research teams competing in Tri-Council funding competitions.

Challenges:

Staffing: Given the focus on EDI in all aspects of research activity, demands for specialized advice and resources remain extremely high and continue to grow. Initial delays in staffing and turnover slowed progress in several areas, however with a new EDI Advisor now in place, this role has proven valuable for supporting the implementation of the CRC EDI action plan as well as for supporting EDI literacy and capacity building in the context of other Tri-Council funding opportunities. While there remain a small number of EDI specialist positions across the University, Faculties and central units alike are strategically adding staff with EDI expertise. We are focused on increasing alignment and exchange across units over the next year to enable coordinated delivery of training and other supports to members of the campus community.

COVID-19: As in 2021-2022, challenges related to the pandemic persisted in the university environment. Challenges ranging from team-building and stakeholder engagement in remote work settings, to staff health and well-being, uneven caregiving responsibilities, and other factors contributed to the delay in establishing focus groups and individual consultations. These actions were incorporated into the goals of the 2022-2023 EDI stipend.

Coordination of initiatives: As highlighted in earlier sections of this report, UCalgary has implemented several impactful EDI initiatives in recent years, particularly since the appointment of our inaugural Vice-Provost and AVPR EDI in August 2020. Through Dimensions and other initiatives, UCalgary has undergone significant institutional self-reflection, which clarified the need for coordinated cross-campus EDIA efforts and, ultimately, an overarching evidence-based EDIA strategy. This self-reflection led to the establishment of the Presidential Task Force on Equity, Diversity, Inclusion and Accessibility (PTF-EDIA), which has the central goal of co-constituting an inspiring, strong, evidence-based EDIA strategy for UCalgary. This coordinated approach has, in some cases, necessitated a temporary slowdown of progress on some programming, in anticipation of the guidance that will be generated from the PTF-EDIA. While overall, this approach will have a significantly positive impact on the research ecosystem at UCalgary, in the short term, this coordinated approach has had an impact on the speed with which individual initiatives can progress.

Part C - Reporting on EDI Stipend objectives not accounted for in Section A

Initiative 1) Data Collection (e.g. self-identification form development)

Objective: This proposed chairholder engagement will be through a survey to collect quantitative data (completed), a qualitative analysis of open-ended questions; semi-structured, qualitative interviews during the summer 2022 months with current chairholders with the goal of understanding their experiences and informing the development of the 2023/4 institutional CRC-EDI Action Plan. Preliminary interviews in 2021 with a small group of chairholders in 2021 indicated the need for routinized interview opportunities to better understand the granular experiences of CRCs. Going forward, our methodological approach to this initiative will include consultation with the institution's official EDI Data Group (chaired by the Vice Provost and Associate Vice-President Research-EDI; https://www.ucalgary.ca/equity-diversity-inclusion/data-and-reports/edi-data-group) to ensure rigour in practices of administration, data management, stewardship and privacy. Funds will contribute to the salary costs for an EDI data specialist leading this initiative.

Performance indicators: Short term: completed consultations and preparation for methodology, data management, administration; completed, transcribed interview dataset of consenting chairholders. Long term: completed analysis and report to inform action plan.

Progress: Quantitative data collection was conducted in spring 2023 via a survey. The survey design and methodology were carefully developed by the Academic Director (EDI Data) in the OEDI with oversight from our institutional CRC Equity Officer, with the work being undertaken through a collaboration between OEDI and the Office of Institutional Analysis (OIA). Full analysis of the data has been delayed, in part because portions of it overlap with the scope of both our Dimensions self-assessment and our Presidential Task Force on EDIA. Efforts are being made to ensure that further data collection and

qualitative interviews do not duplicate the work being done through these other initiatives. Staffing issues and medical leaves have compounded this delay.

Total funds of EDI stipend spent on the objective:
$20,000

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

Provide a high-level summary of how the EDI Stipend was used:
OEDI and OIA developed a survey tool to gather chairholder feedback on chairholder self identification (voluntary) as well as chairholder impressions of inclusion at UCalgary. The survey included questions about the workplace environment, research and administrative supports, teaching loads, career repercussions for parental and medical leaves, and other inclusion-related metrics.

Initiative 2) Implementation of a Project in CRCP EDI Action Plan

Objective: We intend to update our institutional CRC-EDI Action Plan by summer 2024, including with findings from the PTF EDIA WG on EDI in Research. The objectives and outcomes of this EDI action plan will be directly informed by and responsive to the barriers and issues elucidated by Initiative 1. The updated plan will also recognize the significantly evolved institutional EDI infrastructure and formalize the ways in which those communities, processes, frameworks, and emerging practices are coordinated to systematically address barriers in our recruitment processes. This action plan will establish new or revised actions in support of meeting or exceeding the 2029 institutional equity targets, by establishing or deepening promising practices in equity, diversity and inclusion with and for chairholders that translate into aspects of institutional action for EDI in the research ecosystem. Funds will contribute to the salary costs for an EDI Specialist leading this initiative.

Performance indicators: Short term: comprehensive review of current institutional CRC-EDI Action plan to identify outdated or inaccurate information; develop inventory of maps to communicate processes, coordinated actions, etc. Long term: draw on developed content and recommendations from report in initiative 1 to draft a new CRC-EDI Action Plan; complete engagement and consultation process with internal stakeholders; finalize new institutional CRC-EDI Action Plan.

Progress: Like initiative 1, this initiative has overlap (both in terms of scope and activities) with both the PTF-EDIA and the Dimensions Pilot. Between July and December 2022, PTF-EDIA then led by the Vice Provost and AVP Research EDI went through institutional governance and consultation with various EDIA stakeholders, including the Board of Governors, General Faculties Council (GFC), GFC Executive, Executive Leadership Team (ELT), Vice-President Research-Ops (VPR-Ops), the Provost Team, Faculty EDI Leads (FEDI) and the EDI Network. PTF-EDIA was established after months of consultations and input following UCalgary's governance processes. The progress of this initiative was directly impacted by the progress of the previous initiative, as it relies on EDI data generated by initiative 1. Through Dimensions the VPRO and OEDI collaborated with UCalgary's 14 faculties and cross-campus support services to develop and implement frameworks, policies, and initiatives that foster an institutional culture of engagement, excellence, innovation, and accountability in advancing equity, diversity, inclusion, and accessibility

(EDIA). This included developing and disseminating institutional EDI and diversity data reports for university leaders and the broader campus community.

$30,000

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

Provide a high-level summary of how the EDI Stipend was used:
This initiative has advanced through work completed through Dimensions and the foundational work on the PTF-EDIA. This included gathering both qualitative and quantitative data about the research ecosystem at UCalgary, which informed both the formation of the PTF-EDIA and the university's broader strategic direction. The institutional processes, standards, resources, and knowledge developed through the Dimensions EDI pilot and PTF-EDIA Task Force and Working Groups will inform the development of the next version of our CRC EDI Action Plan.

Part D - Engagement with individuals from 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 Dimensions EDI Executive and Steering Committees at the university were integral throughout the reporting period to incorporating EDI into the research ecosystem. These committees are composed of members of every faculty and relevant units related to research, HR, and student or staff support across campus. These committees were diversely constituted to include members of equity-deserving groups (including women, visible/racialized minority persons, Indigenous Peoples, persons with disabilities, and LGBTQ2S+ persons), with additional attention to other dimensions of diversity including age, career stage, staff group, disciplinary differences, perspectival differences, and more.

- The Dimensions Equitable Pathways working groups, each comprising diversity across identities, roles, career stages, disciplines, are engaged in significant work toward identifying the data, gaps, resources, and supports needed for members of all equity-deserving groups within the University's research ecosystem. A further pathway has been established to understand barriers faced by equity-deserving groups (within and beyond CRCs) by engaging with chairholders through focus group discussions, examining the themes and findings identified by the Equitable Pathways Working Groups.

- UCalgary completed our Dimensions self-assessment in fall 2022 and successfully applied for a "Construction" level recognition (which was awarded outside the reporting period.) Through this process, UCalgary's EDI data team produced the most comprehensive disaggregated data ever collected and analyzed at the University of Calgary. The working groups mapped the experiences of members of each historically underrepresented group within the research ecosystem and the university more broadly and identified a number of specific barriers and obstacles to full participation of Indigenous Peoples, LGBTQ2S+, persons with disabilities, visible/racialized persons, and women and nonbinary persons.

- UCalgary's Dimensions Action Plan will ladder up into the Presidential Task Force on Equity, Diversity, Inclusion and Accessibility (PTF-EDIA): co-constituting an inspiring, strong, evidence-based EDIA strategy, with the aim of advancing and embedding the university's commitment to a more equitable, diverse, inclusive and accessible campus community. As noted previously, between July and December 2022, PTF-EDIA went through institutional governance and consultation with various EDIA stakeholders, including the Board of Governors, General Faculties Council (GFC), GFC Executive, Executive Leadership Team (ELT), Vice-President Research-Ops (VPR-Ops), the Provost Team, Faculty EDI Leads (FEDI) and the EDI Network. While it is outside the current reporting period, PTF-EDIA was established in early 2023 after months of consultations and input following UCalgary's governance processes. The plan builds upon ongoing EDI and Indigenous engagement initiatives and strategies, including **ii' taa'poh'to'p**, the **Research and Teaching Awards Equity, Diversity, and Inclusion Plan**, the **Inclusive Excellence Cluster Hiring Initiative**, and the **EDI Dashboard** and **EDI Data Hub**, among others.

Part E - Efforts to Address Systemic Barriers More Broadly within the Institution

Briefly outline other EDI initiatives underway at the institution (that are broader than those tied to the CRCP) that are expected to address systemic barriers and foster an equitable, diverse and inclusive research environment. For example, are there projects underway that underscore the importance of EDI to research excellence? Is there additional training being offered to the faculty at large? Are there initiatives to improve the campus climate? Please provide hyperlinks where 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)

- Dr. Malinda Smith joined the University of Calgary in 2020 as the inaugural Vice-Provost (Equity, Diversity and Inclusion) and Associate Vice-President Research (EDI), launching the new Office of EDI (OEDI), bringing centralized expertise through specialized staff, Academic Director, and Equitable and Inclusive Intern roles.

- The OEDI, in partnership with the Office of Institutional Analysis, has prioritized the collection and availability of high-quality dis-aggregated data to demonstrate persisting gaps in FDG representation in student, staff, postdoctoral scholars and faculty populations, and to inform policies and initiatives to address barriers and gaps. In addition to Equity, Diversity and Inclusion (EDI) dashboard (and additional EDI infographics) launched in March 2021, this partnership has also yielded the EDI Data Hub. This resource directly equips many units to implement data-

informed planning and the establishment of recruitment pool targets for CRC, CERC and other academic hiring processes.

- The OEDI also hosted the first-of-its-kind [NextGen EDI Data Symposium](#) in April 2022, which assembled national and international experts in EDI data in a 2-day virtual Symposium. Materials from the inclusive and accessibly designed event remain available to the University and broader community.

- In October 2021, University of Calgary launched the [Equity, Diversity and Inclusion in Research and Teaching Awards Pilot Plan](#), jointly developed by the Offices of Vice-President Research, and the Vice Provosts EDI and Teaching and Learning. This was approved as an institutional plan in summer 2022. The Plan embeds EDI into the identification and nomination of candidates for external research and teaching excellence awards and is currently in use by faculties who are also providing feedback to inform ongoing improvements and development of the plan by the drafting committee.

- With leadership from the OEDI, the Office of Research Services EDI Advisor has developed a number of EDI guides, workshops, and tips sheets to support researchers and research teams in the development of impactful EDI and accessible action plans for tri-council and other funding competitions. All research analysts and officers supporting competitions with EDI requirements (e.g. SBGA+ or intersectional research design, addressing systemic barriers and EDI in mentorship and training) are also provided increased support and coaching to review and advise researchers in effectively meeting such requirements.

- In 2022, the University of Calgary joined other Canadian institutions as a signatory to the *Scarborough Charter on anti-Black racism and Black Inclusion in Higher Education: Principles, Actions, and Accountabilities*. The ratification of this charter affirms the University of Calgary's commitment to accountable action to address anti-Black racism.

- Led by the OEDI, several new and continuing initiatives have amplified the increasing expertise within and beyond the University of Calgary. These include the University's annual Equity, Diversity and Inclusion Awards; Courageous Conversations series; EDI Week; International Womens' Day Break the Bias event, in addition to sustained programming on foundational EDI and substantive topics. In 2022, the OEDI team created dedicated web pages for [Black History Month](#), [Asian Heritage Month](#), [International Womens' Day](#), [Anti-Black racism](#), and an [LGBTQ2S+ Guide](#). The Offices of EDI and Research Services also offer programming on EDI in research, including sessions on addressing EDI requirements in specific competitions (e.g. Discovery Grant, CFI Innovation Fund) and implementing EDI Action plans in research design and practice more generally.

- The University's Taylor Institute for Teaching and Learning has also deepened and broadened its *[EDI Workshop Series](#)* offerings to support the integration of equity, diversity, inclusion, accessibility, and decolonization in teaching and learning.