



Revised
Saint Mary's University
Canada Research Chairs
Equity, Diversity and Inclusion Action Plan

June 12, 2020

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INTRODUCTION

The Saint Mary's University Action Plan for Equity, Diversity, and Inclusion (EDI) within the Canada Research Chair (CRC) Program is provided here in this document, along with the University's statements regarding our commitment to transparency in pursuit of these EDI goals.

This EDI Action Plan should not be viewed as a static document, but rather one which will be frequently under review and discussion, and then updated as areas of improvement are highlighted and identified. The development and monitoring of this Action Plan nominally falls under the Office of the Vice-President Academic and Research, but has been operationalized by delegation to the Associate Vice-President Research / Dean of Graduate Studies and Research, with extensive expert support being provided by the Saint Mary's University Diversity and Inclusion Advisor within the Human Resources unit.

The Action Plan as presented here is a product of initial consultations with current Canada Research Chairs and other small groups of research faculty, and then most recently much more extensive consultations done as part of our Employment Systems Review (ESR). We have also formed an EDI Advisory Committee who not only participated in the recent consultations, but who will also play an ongoing role in the assessments and updating of this Action Plan.

This document begins with commitment and transparency statements which were included as part of Saint Mary's University's original required public postings in Fall 2017, as part of the launching of the Canada Research Chair EDI initiative. Following those statements, updated details of the EDI Action Plan are outlined, along with relevant supporting documents provided in the Appendices.

SAINT MARY'S UNIVERSITY'S EQUITY, DIVERSITY AND INCLUSION COMMITMENT STATEMENT:

Saint Mary's has a culture of respect that acknowledges diversity and cultural intersection, and that supports civil dialogue. Saint Mary's University is committed to the promotion of a safe and respectful learning and work environment, valuing diversity and encouraging compassion, empathy and respect. Further, Saint Mary's University remains committed to the principles of Employment Equity and promoting a fair and inclusive workplace, free from discriminatory barriers; this commitment to Employment Equity means we seek to achieve equality by eliminating barriers to employment which have existed for certain

groups, particularly Aboriginal people, persons with disabilities, members of visible minorities and women.

Saint Mary's University's Strategic Initiative #2 on *Intercultural Learning* includes a university-wide initiative to promote diversity, both within the student body and employees.

STRATEGY FOR RAISING AWARENESS WITHIN SAINT MARY'S UNIVERSITY OF ITS COMMITMENT TO, AND THE BENEFITS OF, EQUITY, DIVERSITY AND INCLUSION:

Saint Mary's strategy to raise awareness consists of but is not limited to consulting and communicating with the various stakeholders, publishing information on webpages, information sessions, departmental meetings and training.

In addition, Saint Mary's University's commitment to equity, diversity and inclusiveness is detailed through the *Safe and Respectful at Saint Mary's* initiative, including a Declaration of Respect (found here: <http://www.smu.ca/webfiles/DeclarationofRespect.pdf>), which has involved extensive consultations across the university community during its development. Many relevant results, reports, and commitments are posted online here: <http://www.smu.ca/about/safe-and-respectful-smu.html> including reports from the President's Council and the Action Team. The importance of respect, diversity, cultural intersection and civil dialogue are prominently highlighted in the Saint Mary's University Strategic Plan 2017-22, posted online here:

https://president.smu.ca/s/SMU_Strategic-Plan-2017.pdf

Saint Mary's University's specific commitment to Employment Equity – which applies to all areas of hiring across campus, including Canada Research Chairs – is posted online here:

<http://www.smu.ca/about/employment-equity.html>

RECRUITMENT POLICIES AND PROCEDURES, AND TRANSPARENCY SAFEGUARDS

The recruitment process for Canada Research Chairs primarily follows that mandated for all faculty positions in the SMUFU/SMU Collective Agreement, Article 10.1.20 – the Collective Agreement is posted here:

<https://smu.ca/webfiles/SMUFUCASep12018toAugust312021NewAgreementsearchablesigned.pdf>

Some changes from the exact process outlined in Article 10.1.20 are implemented for CRCs, and these changes are requested for approval from the Saint Mary's University Faculty Union prior to initiating a CRC search. These changes are as follows.

- To best ensure an open and transparent recruitment and selection process for CRCs, search committees for a Chair within a particular department will be comprised of all Department members holding appropriate appointments, rather than a committee of three members – this is allowed under Article 10.1.20(d), but will be mandated due to the position being a CRC rather than at the Department's discretion.
- For CRC positions within an interdisciplinary area that could be filled by a researcher associated with more than one Department, the role of Department members in the selection process will be accomplished using a pre-defined/pre-approved list of faculty members associated with the interdisciplinary area/program.
- The Associate Vice-President Research will participate as a non-voting member of the search committee.
- The CRC position will be "supernumerary" and not count toward a Department's normal faculty allotment.
- The advertisement for the position must be approved by Associate Vice-President Research and Vice-President Academic and Research.

As was noted specifically in the Employment Systems Review (ESR) which SMU conducted to provide guidance in informing this EDI Action Plan: "Saint Mary's has recruited among the four designated groups. Candidates from these groups have been encouraged to apply in advertisements [...] and efforts have been made to place advertisements in publications, etc. where they can be seen by under-represented groups." This aspect will be addressed to become normalized as part of our Employment Equity Plan development in direct response to this issue noted in the ESR (more details on the ESR are provided in a section below).

MANAGEMENT OF CHAIR ALLOCATION

At the current time, Saint Mary's University has significant flexibility in assigning Chairs to specific research disciplines. This arises because we have a small number of Chairs (8 in total, as of 2020 – 2 Tier I and 6 Tier II), with 3 of those already designated as Special Chairs (leaving 4 NSERC designated and 3 SSHRC designated). Therefore, this mix coupled with the Corridor of Flexibility allowing up to 5 changes from initial designation, provides essentially maximal freedom to assign research area.

As indicated in the current Saint Mary's University Strategic Research Plan, the assignment of CRCs within SMU is the responsibility of the Vice President Academic and Research (VPAR). The VPAR or his/her delegate(s) – typically the Associate Vice-President Research (AVPR) – will review the allocation of CRCs within the University on a regular basis, and particularly when a CRC is up for renewal, at the end of a term, or when a Chair otherwise becomes vacant.

When a Chair is becoming vacant, the above allocation review will be done in close consultation between the VPAR, the AVPR, and the Deans of SMU's four Faculties (Arts, Science, Business), following a **Call for Proposals** distributed to all faculty. The Call will invite Departments, or groups of inter-disciplinary/cross-departmental faculty members, to propose the vacant Chair be filled in a particular thematic area that is argued to be consistent with, and advance the goals of, the University's Strategic Research Plan; such proposals will have a required section on EDI discussing how the goals of the EDI Action Plan will be addressed and met. The review by the VPAR, together with the AVPR and Deans, of the received proposals, in light of the overall current CRC allocations across campus, will result in a decision of the research theme/area of the new Chair which will advance both the Strategic Research Plan and EDI Action Plan objectives.

RENEWAL CRITERIA

It is the plan, expectation, that all Saint Mary's University CRCs will successfully renew, and complete both terms of their appointment. Mentorship and guidance for research success is provided by the Faculty Dean, the AVPR and VPAR throughout a CRC's appointment, and particularly during their first term. CRCs provide the same Annual Reports of Activities as are required by all SMU faculty members (Article 8.4.13), and feedback is formally provided annually through this. Starting in 2020 with the implementation of this CRC EDI Action Plan, the AVPR will provide specific feedback on CRCs' Annual Reports on aspects related to EDI, and the CRCs' contributions to the promotion of EDI within their research activities. Assistance is provided by the AVPR and the Research Grants Officer in the preparation of CRC renewal packages. To date, all Saint Mary's University Canada Research Chairs have successfully renewed their appointments to a second term.

ADVANCEMENT CRITERIA

The criteria and process for Canada Research Chairs to advance in rank from Assistant to Associate, or Associate to Full, or to achieve Tenure, are the same as for all faculty members at Saint Mary's University. These are outlined in the SMUFU/SMU Collective

Agreement's Article 11.0 on *Renewal, Promotion, and Performance*. Because of the small number of CRCs at SMU, we do not offer an Advancement route from a Tier 2 Chair to a Tier 1 – rather, as indicated above, it is expected that CRCs will renew and complete both terms; following that, the outlined process for filling a vacant Chair spot is initiated.

CRITERIA FOR PHASE-OUTS

At Saint Mary's University, Canada Research Chair positions are not phased-out; rather, the expectation is that all Chair holders will complete both terms of their appointment. After completion of both terms, the process described above in the "Management of Chair Allocation" is initiated to determine what research area a replacement CRC will be held in.

Under circumstances wherein the University loses a Chair position through the Secretariat's regular re-allocation processes, the lost position is managed by not immediately filling the next Chair vacancy that arises through a Chair's completion of two terms. In such cases, the process of determining a replacement Chair is only embarked upon when the next, subsequent, Chair position becomes vacant.

Since CRCs are hired as faculty members under the SMFU/SMU Collective Agreement, upon completion of their Chair position all CRC's retain their faculty position at the same rank and step which they have attained while in the Chair position.

PROCESS FOR DETERMINING LEVEL OF SUPPORT PROVIDED TO CHAIRHOLDERS

The level of support provided to Chairs is and has been, consistent for all CRCs. This is commented upon below in our Comparative Analysis section that reviewed supports provided to all of our Chairs; that section documents all available components of support provided to CRCs, along with providing a discussion comparing these support levels between Chairs.

Given the resource availability at Saint Mary's University, there is only a small amount of flexibility that can be applied when constructing our overall support package for a CRC nomination for a given Tier (I or II), and thus we ensure consistency across research areas, and for all individuals being nominated in that Tier (independent of discipline, rank, or any other individual aspect). The specific terms of the supports supplied for a prospective Chair nomination (e.g. course release to free time for research, funding for equipment or travel or student support, etc.) are done through discussions with the Faculty Dean, the

AVPR, and VPAR, with final approval by the VPAR. The rank and base-salary offered a prospective Chair follow the guidelines mandated by the SMUFU/SMU Collective Agreement (within Article 10.1). While the final approval lies with the VPAR, the proposed terms of support for a nomination must be reviewed with the Faculty Dean, AVPR and VPAR in comparison to those of the existing SMU CRCs, and majority agreement obtained concurring the supports contained in the proposal are equitable with existing CRCs prior to progressing with the final approval.

ENSURING CAREER LEAVES DO NOT DISADVANTAGE CHAIRS OR APPLICANTS

Saint Mary's University and the Saint Mary's University Faculty Union have agreed in their commitment to ensuring that faculty members do not experience discrimination – this aspect is codified in Article 9.0 of the SMUFU/SMU Collective Agreement. Further, Article 19.0 on "Leave" guarantees that faculty who take Leave, for a wide variety of reasons outlined, are not to be disadvantaged due to the Leave, and shall resume their position at the same rank/step they held previously; time taken for Leave therefore is not "counted" in the assessment of performance of a faculty member, or CRC (for the purposes of Annual Reporting, or consideration for tenure, promotion, or Chair renewal). These agreements and understandings which are in place for our existing Chairs and faculty members therefore also apply for the process of reviewing applications for open Canada Research Chair positions during the search phase. Legitimate career interruptions are covered in the Equity Training that is provided to faculty members. Going forward, SMU will ensure the following safeguards are in place:

- Acknowledging within the CRC job postings that as an Institution, we understand the potential impact legitimate career interruptions can have on a candidate's record of research achievement and this will be taken into consideration;
- Encouraging potential candidates to explain within their application the impact that career interruptions have had on their record;
- Allowing potential candidates to submit a full career or extended CV in cases where they have had career interruptions; and
- Sensitizing and instructing selection committees to carefully consider the impact of career interruptions on a potential candidate's record.

EMPLOYMENT SYSTEMS REVIEW

The Employment Systems Review was initiated in the summer of 2019. The University engaged an external consulting firm to conduct the review. The purpose of the review was to analyze how the policies and practices may have negative impacts for the four

designated groups (women, people with disabilities, Indigenous people, and visible minorities). The scope was expanded beyond the Canada Research Chairs to also include faculty recruitment. The primary focus was on the four designated groups per the Employment Equity Legislation: women, Aboriginal peoples, persons with disabilities and members of visible minorities. Documents reviewed included:

- Collective Agreement between Saint Mary's University and the Saint Mary's University Faculty Union – provisions related to hiring and the Positive Actions to Improve the Employment of Women, Persons with Disabilities, Visible Minorities and Aboriginal Peoples.
- Data Analysis of the internal representation data (faculty) for March 31, 2019, and the 2016 Census data
- Previous CRC job postings/advertisements
- Self-Identification Form for Faculty Recruitment
- EE Commitment Statement

Consultations were held with 20 diverse members of the Saint Mary's University community including current Research Chairs, Faculty Members, Senior Administrators and HR leaders. Although the Consultants took the lead in this review, the Associate Vice-President Research and the Diversity and Inclusion Advisor were actively engaged in the process. Efforts were made to ensure there was representation of individuals from the designated groups as well as various genders and gender identities. These consultations took place via individual in-person and telephone interviews, and focus groups. A qualitative approach was taken for this review. These discussions included various EDI issues and also contributed to the environmental scan.

The Employment Systems Review resulted in the identification of barriers as well as recommendations. These recommendations will help inform a series of proactive initiatives that address the processes and procedures by which the Canada Research Chairs and faculty members are recruited and hired.

Key findings included:

- The SMU Full-Time Faculty Collective Agreement clause 10.4. contains specific equity language and some best practices that could positively impact on the recruitment of members of the FDGs. The Collective Agreement references the FDGs per the Employment Equity Legislation, however to be more reflective of diversity in society the language needs to be more inclusive of other genders.

- Saint Mary's has a number of policies in place that support an inclusive environment however there is a noticeable absence of an Employment Equity Policy.
- The current SMU equity commitment statement requires an update for more inclusive language.
- The Collective Agreement suggests suitable locations for advertising faculty positions. SMU should ensure a more targeted approach to advertising positions, especially in departments where under-representation exists.
- It was noted that although SMU is currently meeting the established CRC targets, there is no representation of Indigenous Peoples or persons with disabilities.
- More guidance/supports need to be made available for internal faculty members desiring to apply for an open CRC position, given the complexity of the CRC application process.
- Language used in previous postings for CRC recruitment lacked the inclusion of EDI and could potentially discourage FDGs from applying. Future postings and should reinforce the value of equity, diversity and non-traditional research methodologies.
- There is a need for more vigorous, inclusive data collection and analysis during the recruitment process. Questions arose of the following nature: If we have diverse applicant pools, are these candidates making short lists? If not, why are they being screened out? Are they being screened out at a rate higher than non-designated group members?
- SMU needs to ensure there is consistent use of the self-identification forms provided as part of CRC and faculty recruitment process. It appears that some departments use the form while others opt out.
- There is a need to increase awareness of obligations regarding accommodations related to recruitment. This goes beyond medical accommodations. For example, reasonable accommodations necessary for nursing candidates during a long and rigorous interview process.
- Creation of a standardized checklist for CRC and faculty recruitment is needed to ensure consistency and equitable considerations during the recruitment process.
- Retention rates for designated group members should be analyzed. A faculty exit survey should be developed and would allow for feedback from exiting Chairholders as well as faculty members.
- SMU needs to be more proactive with attracting applications from members of designated groups for CRC, faculty and staff positions.

COMPARATIVE ANALYSIS

A comparative review of all CRCs at Saint Mary's University was undertaken by the Associate VP Research and the Diversity and Inclusion Advisor. The following variables were considered in the review:

- salary
- research/travel grant
- teaching/course release
- administrative support
- mentoring
- office space

While the small numbers of CRCs compared restrict our ability to provide specific numerical values (comparing 7 Tier II CRCs to each other; and 2 Tier I CRCs), the following findings can be reported.

All CRCs receive identical amounts of teaching release. All CRCs are home to departments with a comparatively small number of faculty members (part of the character of Saint Mary's), which allows them all excellent and equitable access to their departmental administrative support person and mentoring from senior faculty colleagues (and their Faculty Dean). Faculty office spaces at Saint Mary's do not have much variation in size across campus, as such all CRCs have comparable office spaces.

The analysis shows there were some variations dependent upon which of the three Saint Mary's University Faculties (Arts, Science, Business) the CRC was a member of when comparing the sum of salaries and provided research/travel grant allowance. The variances in these categories, however, are well understood by the normal practice for hiring faculty members within our three Faculties, with "Faculty" being seen as the driving dependency (Arts, Science or Business) and not correlated to membership in a designated group (e.g. Science researchers establishing an on-campus laboratory routinely receive "start-up" funds to facilitate this need, compared to Arts or Business faculty who do not have this need); thus, these two variables collectively, when compared to non-CRC appointments within Faculty, show good consistency across all CRCs - with the exception of two CRCs (in two different Faculties) that this analysis revealed have a little lower support than required to stay within acceptable variation (within 20% of the mean). Support levels for these two CRCs will be elevated appropriately as a result of this comparative analysis.

In summary, after all the considered variables were reviewed and compared, no significant discrepancies were identified and, importantly, no adverse impact on members of the designated groups was identified.

ENVIRONMENTAL SCAN

The purpose of conducting an environmental scan was to gauge the level of satisfaction with SMU's workplace environment as experienced by Chairholders. Due to the small number of Chairholders, a qualitative approach was taken. The open-ended questions enabled participants to provide feedback on the environment and experiences. The review was initiated with two focus groups led by the Associate Vice President, Research and the Diversity and Inclusion Advisor. Feedback received from Interviews conducted as part of the ESR also contributed to this analysis.

The final stage of the scan included confidential surveys that were provided to the current Chairholders. In total, four of the nine current Chairs returned completed survey, three of whom identified as designated group members. Generally, the Chairholders feel their CRC recruitment process was long, strenuous and at sometimes confusing. However, the process, in their opinion was fair, equitable and transparent. The research environment at Saint Mary's is collegial and respectful. Overall there is a high level of satisfaction among current Chairholders. Those who returned the survey, indicated they are satisfied or fully satisfied with the level of support they receive from SMU.

Other findings/issues arising out of the Environmental Scan interviews included:

- Throughout the consultation process it was evident that many participants felt that providing education, awareness and training events related to EDI were valuable and contributed to changing attitudes and creating an inclusive and respectful campus environment. Most responded they were aware of the Equity training related to recruitment, but that additional offerings need to be provided. Perhaps there needs to be better promotion of additional training, speakers, and events scheduled.
- It was recommended that faculty from the FDGs participate in the consultation process for the next update to the Strategic Research Plan and that the Plan be written with a focus on EDI themes that would attract more diverse applicants.
- Saint Mary's University supports and encourages self-identification and achieves a high response rate from employees, but improvements need to be made to the survey. For example, the gender category needs to be expanded beyond women. By doing so, it will allow for a more robust intersectional analysis.

- Saint Mary's should create opportunities for new chairholders from designated groups to network and meet with other CRC colleagues. In some cases, they could be the only designated group members in their department.
- Discussions identified the need to provide departing faculty and chairholders with exit interviews to identify trends and opportunities for improvements. It was felt that faculty members from equity seeking groups had left the institution and could have provided valuable feedback.
- There is limited financial support for widespread advertising of positions outside free platforms.
- Much more could be done to foster a culture of EDI across campus – a suggestion was that each department could have an EDI committee.
- Ensure supports are in place for chairholder renewal well in advance.
- Ensure gender parity with CRC starting salaries and grades.

EQUITY, DIVERSITY AND INCLUSION OBJECTIVES AND MEASUREMENT STRATEGIES

| CRC Total: 8 | Targets | Numbers | Representation | Gaps |
|---------------------------|---------|---------|----------------|------|
| Visible Minorities | 15.0% | 1 | ** | ** |
| Women | 31.0% | 3 | ** | ** |
| Indigenous Peoples | 1.0% | 0 | ** | ** |
| Persons with Disabilities | 4.0% | 0 | ** | ** |

* Per the CRC Program and in keeping with the Privacy Act, numbers lower than five were removed to protect the privacy of chairholders.

The Action Plan has been informed through the Employment Systems Review, Comparative Analysis and the Environmental Scan.

Objective 1: Strengthen Institutional commitment to Equity, Diversity and Inclusion.

| Actions | Indicators and Metrics | Responsibility | Timeframe |
|--|--|---------------------------------|-----------|
| 1.1 Develop and implement the Saint Mary's University Employment Equity Policy. | Policy is in place | Executive Management Group & HR | 2020 |
| 1.2 Establish the Saint Mary's University Employment Equity and Diversity Steering Committee with composition from various stakeholders on campus. Regular meetings of the Steering Committee | Committee established # of meetings Attendance | Executive Management Group & HR | 2020 |
| 1.3 Develop Saint Mary's University Employment Equity and Diversity Plan. In consultation with stakeholders on campus. | Plan developed with accountabilities. | Executive Management Group & HR | 2021 |
| 1.4 Incorporate EDI themes within the updated Strategic Research Plan. | | AVP, Research | 2020 |
| 1.5 Faculty proposals to host a CRC must include an EDI commitment and these proposals will be given priority. | # of proposals | AVP, Research VPAR Deans | 2021 |

Progress and Next Steps:

1.1, 1.2 and 1.3 (In progress) The development of the Institutional Employment Equity Policy and the establishment of an Employment Equity and Diversity Steering Committee are currently in progress. Once both are in place, the committee will start the development of a plan. To further strengthen the commitment to EDI, Saint Mary's University has signed

the Dimensions Charter and by doing so, commits to upholding the principles of the Charter.

1.4 (In progress) The renewal/update of the SRP (2012-2017) had been delayed, but the timing of update – following on from extensive consultations during 2019 – will ensure a focus on EDI themes is incorporated with the release in the latter half of 2020.

1.5 (next possible opportunity 2021) The next available open Chair search won't begin until 2021, and at that time, this Action will be engaged.

Saint Mary's University is committed to have a diverse and representative workforce at all levels. The Institution is currently meeting its targets for women and members of visible minorities based on the current targets set. Although there is no target/gap for Indigenous Peoples or persons with disabilities, the Institution will make every effort to increase representation of these two groups.

Objective 2: Meet or exceed the Canada Research Chairs equity targets for women, persons with disabilities, members of visible minorities and Indigenous Peoples.

| Actions | Indicators and Metrics | Responsibility | Timeframe |
|--|---|---|-----------|
| 2.1 Ensure CRC job postings will use inclusive language and include statements on: - commitment to equity - career interruptions - accommodations | # of postings written through a diverse lens # of postings reviewed by EDI Advisor | AVP Research HR-EDI Advisor | 2018 |
| 2.2 Ensure targeted outreach/advertising to attract candidates/researchers from the designated groups. | # of non-traditional advertising venues utilized | AVP Research | 2018 |
| 2.3 Require all members of the CRC selection committee participate in Equity training. | 100% participation of all committee members | AVP Research, VPAR HR-EDI Advisor | 2018 |

| | | | |
|--|--|--|------|
| 2.4 Create a CRC Self-Identification Questionnaire and ensure it is implemented as part of the recruitment process. | Survey created Response rate | AVP Research VPAR HR-EDI Advisor | 2019 |
| 2.5 Require CRC selection committee has representation from the designated groups. | # representative committees Diversity of representation | AVP Research VPAR HR-EDI Advisor | 2018 |
| 2.6 Create a guide to assist internal candidates with the nomination and renewal process including timelines and available supports. | Feedback received | AVP Research | 2020 |

Progress and Next Steps:

2.1 (On-going) The next CRC recruitment at SMU is scheduled to begin in the fall 2021. To ensure the job posting has been written through a diverse lens, the job posting will be reviewed by the Diversity and Inclusion Advisor. The Diversity and Inclusion Advisor has also developed a checklist that faculty can use as a guide to ensure best practices have been utilized. The VPARs office also requires search committees to indicate all positive actions they have implemented in conducting their search. This document is submitted as part of the approval process.

2.2 (On-going) Search committees advertise in traditional venues listed in the Collective Agreement such as University Affairs, CAUT, the SMU website and occasionally on Career Beacon. These sources of advertising may not reach a diverse audience therefore departments are encouraged to consider more targeted advertising in an effort to attract a more diverse applicant pool. The Diversity and Inclusion Advisor is often consulted to assist in identifying potential journals and associations.

2.3 (On-going) Training by the Diversity and Inclusion Advisor on EDI, Accommodations and Unconscious Bias is delivered to faculty members and Deans as members of departmental search, appointments, promotion and tenure committees. The sessions also provide for discussion regarding clauses in the collective agreement related to equity and hiring.

2.4 (On-going) A CRC Self-Identification Questionnaire form has been created and will be utilized as part of the upcoming Chair recruitment process. In the past, self-identification has not been included in the recruitment of previous chairs. The form will be utilized as part of the upcoming recruitment. This will enable the Diversity and Inclusion Advisor to

conduct analysis on the representation of designated groups at the various stages in the recruitment process.

2.5 (On-going) As with faculty recruitment, the Collective Agreement requires that at least one member of the search committee be a member of a designated group. The default usually is women however departments are encouraged, when possible, to consider other designated groups and gender identities in an effort to have broader perspectives. Human Resources has created a self-identification form for search committee composition. This form is shared with members of the search committee and then sent to the Diversity and Inclusion Advisor who will then inform the committee chair whether or not the requirement has been met. It should be noted that this process can be challenging as individuals with hidden or invisible disabilities may choose to not disclose.

2.6 (In progress) The development of a recruitment guide is currently underway. It is anticipated to guide applicants through the recruitment process. The guide will be available in time for the next recruitment in the fall of 2021.

Outcome: Saint Mary's University will continue to meet or exceed the targets for women, members of visible minorities, persons with disabilities and Indigenous Peoples.

Objective 3: Ensure sufficient EDI tools and training for all members of CRC and faculty recruitment committees.

| Actions | Indicators and Metrics | Responsibility | Timeframe |
|--|---|---------------------------------|----------------------|
| 3.1 Develop and provide in-house training sessions and materials related to Equity, Diversity and Inclusion. | # of EDI training sessions provided | HR-EDI Advisor VPAR | 2017 and ongoing for |
| 3.2 Promote and encourage completion of the CRC Unconscious Bias Module. | # of depts that request training, # faculty members | AVP Research Human Resources | |
| 3.3 Promote and encourage completion of the Harvard Implicit Association Test. | | | |

| | | | |
|--|--|--|--------------------------------------|
| 3.4 Organize and promote internal EDI events, workshops, training sessions and conferences. | # faculty members who complete unconscious bias training | | everything except checklist is 2020. |
| 3.5 Promote external EDI events, workshops, training sessions and conferences. | # processes that follow EDI checklist | | |
| 3.6 Create and distribute EDI checklist for faculty recruitment. | # internal/external events | | |
| 3.7 Partner with Canadian Centre for Diversity and Inclusion to compliment training and awareness session. | # new faculty/staff sessions | | |
| 3.8 Incorporate EDI session into the orientation sessions for new faculty and staff. | | | |

Progress and Next Steps:

3.1 (On-going) The University continues to develop training and workshops focused on EDI, accommodations, best practices for diversity recruitment and unconscious bias. As a result of the last round of bargaining in 2018, Equity training is mandatory for everyone involved in committees for faculty recruitment as well as those granting appointments, promotion and tenure. Human Resources keeps record of attendance and this participation is verified by the VPAR's office as part of the approval process. To date over 80 faculty members and Administrators have participated in the mandatory training.

3.2 and 3.3 (On-going) Several faculty members have indicated in that they have completed both the CRC Unconscious Bias Training module as well as the Implicit Association Test. Feedback received indicates it was found to be an enlightening experience.

3.4 (On-going) Several events such as the Equity Speakers Series and the Aboriginal Humility Training have been organized on campus to raise awareness of EDI with good attendance from members of the SMU community.

3.5 and 3.7 (On-going) Members of the Saint Mary's community have participated by webinar and in-person training offered by other post-secondary institutions, Canadian Centre for Diversity and Inclusion, Pride at Work Canada as well as other external providers.

3.6 (In progress) The EDI Recruitment checklist is in progress and will be made available to departments upon completion. This as well as the Best Practices for Diversity Recruitment Guide will serve as reference tools for faculty members.

3.8 (On going) The Diversity and Inclusion Advisor continues to be invited to present new faculty members on EDI at Saint Mary's. This is an opportunity for the Diversity and Inclusion Advisor to introduce herself as well talk about some of the services and supports available through that office.

Outcome: Individuals involved in the hiring process will have participated in training and have a great awareness of the importance of Equity and a greater self-awareness of personal bias.

One of Saint Mary's areas of strength is the high response rate to the internal self-identification. The university holds a University wide campaign every three years. The last campaign was held in 2019 and the University response rate was 89%. HR provides questionnaires to all new hires as part of the on boarding process. Employees may update their information at any time utilizing the questionnaire on the HR website. The self-identification questionnaire for faculty recruitment has been used inconsistently as part of the faculty recruitment process. Moving forward every department will be required to utilize this questionnaire. Training has been provided to departmental secretaries on procedures for implementation.

Objective 4: Enhance existing data collection tools and reporting mechanisms to ensure robust availability of data.

| Actions | Indicators and Metrics | Responsibility | Timeframe |
|--|--|----------------|-----------|
| 4.1 Update the SMU internal self-identification questionnaire and the CRC and faculty recruitment self-identification forms to include a broader set of characteristics to allow for intersectional, disaggregated analysis. | New forms utilized Response rate # of self-identifications | HR-EDI Advisor | 2019 |

| | | | |
|---|--|-----------------|------|
| 4.2 Perform analysis of drop-off rates for members of designated groups in CRC and general faculty recruitment processes. | Rate at which designated group members drop off compared to non-designated group members | HR- EDI Advisor | 2020 |
| 4.3 Perform annual workforce analysis exercise to determine EE gaps. | Areas of under-representation/gaps identified | HR- EDI Advisor | 2020 |
| 4.4 Analyze results of exit interviews and share findings appropriate office. | Issues/concerns identified | HR | 2020 |

Progress and Next Steps:

4.1 (Complete) Institutional self-identification questionnaires used for internal employees, faculty and CRC recruitment have been updated to include an expanded visible minority option as well as ability to identify as a gender beyond women. This will allow for intersectional analysis.

4.2 (On-going) The self-identification form for faculty recruitment has been implemented. The Diversity and Inclusion Advisor has started the analysis of various applicant pools and results will be reported to the appropriate Dean/Chair.

4.3 (In progress) Processes have been put in place to enable an Institution-wide workforce analysis exercise to be conducted. The results will be analyzed and with shared with the Executive Management Team and the Saint Mary's Employment Equity and Diversity Steering Committee.

4.4 (Complete) HR has developed an exit survey that will be offered to exiting CRCs and faculty members. Depending on the findings, the results will be shared with the appropriate office and equity issues/concerns will be managed in consultation with HR. HR will conduct the interview starting with the next chairholder who is finishing at the end of 2020.

Outcome: Saint Mary's will have the necessary data to perform analysis and make informed decisions.

Objective 5: Build on existing initiatives to ensure a supportive and inclusive environment for Chairholders.

| Actions | Indicators and Metrics | Responsibility | Timeframe |
|--|--|--------------------------------|-----------|
| 5.1 Implement annual individual in-person meeting with chairholders and Associate Vice-President, Research. | # of meetings Feedback nature of discussions | AVP, Research | 2020 |
| 5.2 Establish a formal mentoring program to support new or junior chairholders. | # of Chairs participating Feedback on usefulness | AVP, Research | 2020 |
| 5.3 Conduct regular review of chairholder supports provided to ensure equitable and ensure members of designated groups not disadvantaged. | Findings of review inequities | AVP, Research EDI Advisor | 2020 |
| 5.4 Create networking opportunities for chairholders to meet colleagues. | # of opportunities and participants | AVP, Research VPAR | 2020 |
| 5.5 Establish a process to notify and support chairholders in advance of their renewal deadline to ensure a flawless process. | | AVP, Research | 2020 |
| 5.6 Conduct exit interview with all chairholders leaving SMU to follow-up on any equity issues identified. | # exit interviews conducted extent of equity issues | AVP Research HR-EDI Advisor | 2019 |

Progress and Next Steps:

5.1 (on-going) With the development of this Action Plan, the scheduling of these annual meetings will begin immediately.

5.2 (In-progress) Mentoring program will be developed during 2020 in consultation with AVPR, VPAR and Deans, and initiated at the beginning of 2021.

5.3 (on-going) At the time of every Renewal or New Chair nomination, this review and comparative analysis of Chairholder supports will be done to ensure equitable supports provided for the nominated Chair.

5.4 (in-progress) As part of what will be reflected in the renewed/updated SRP draft to be completed by the end of 2020, there will be direction for at-least-annual symposia or workshops which will be targeted for each of the identified priority Research Theme areas. Through these, each CRC will see direct engagement with one or more of these annual events, which will be designed to bring SMU researchers within each priority Theme area together.

5.5 (in-progress) AVPR will work with the Research Grants Officer to ensure a timeline of informing and working with Chairholders coming up to renewal is established, and implemented.

5.6 (on-going) First exit interview to be held when next Chairholder finishes terms – which is the end of 2020.

EQUITY, DIVERSITY AND INCLUSION TRAINING

Any individual involved in the processes of CRC recruitment is required to have training related to unconscious bias, equity, diversity and inclusion:

- All individuals involved in the recruitment of CRCs must complete the Equity and Diversity Awareness session provided through Human Resources.
- All individuals involved in the recruitment of CRCs must complete the online Unconscious Bias Training provided through the CRC Secretariat. This will be coordinated through Human Resources.
- Information on external workshops and conferences related to equity, diversity and inclusion will be shared by Human Resources, and the Office of the Vice President, Academic and Research, with faculty, staff and Administration for participation.

The Diversity and Inclusion Advisor maintains records for all faculty who have participated in training sessions. As this training is now mandatory for all faculty recruitment, The Vice-President, Academic and Research, confirms participation as part of the appointment approval process.

PROCESSES AND STRATEGIES FOR COLLECTING AND PROTECTING SELF-IDENTIFICATION DATA

Currently all full and part-time faculty, librarians as well as staff are provided with the self-identification form as part of the on-boarding process. Self-identification for current chairholders is included in the University's primary employment equity data collection. The University holds a

university wide campaign every three years. The 2019 campaign indicate a response rate of 85% for full time faculty. The self-identification form is available on the HR website so that it can be accessed and filled out at any time. This information is then compared to workforce availability percentages using the Employment Equity Data Report. Current Chairholders have been provided the opportunity to self-identify.

As part of the faculty recruitment process including CRCs, applicants are currently sent an electronic version of the Self-Identification Questionnaire that is used for faculty recruitment. Currently there is no consistency with its use. Human Resources is exploring the possibility of an online form which, when submitted, will automatically populate a database. This will be a more efficient process. The Diversity and Inclusion Advisor in Human Resources encourages Deans and Chairs to discuss the questionnaire and promote participation to their Faculties.

The data collected in the self-identification questionnaire is confidential. As such all questionnaires are sent in a sealed envelope or emailed to the attention of the Diversity and Inclusion Advisor in the Human Resources Department. The information is analyzed and reported in summary form, with no individuals identified.

The self-identification Questionnaire related to faculty recruitment is sent by the applicant directly to the Diversity and Inclusion Advisor. This information is stored on encrypted, password protected spreadsheets and only shared if it becomes relevant per Article 10.4.5 of the SMUFU Collective Agreement. When reports are created, all data is aggregated, and any identifying information is removed. When reporting on departments with less that 10 individuals, the information is suppressed.

STRATEGIES TO ENCOURAGE SELF-IDENTIFICATION

Saint Mary's University currently includes the following equity statement on all job postings. It is important to note that this statement is currently under revision and will be updated shortly.

"Saint Mary's University hires on the basis of merit and is committed to the principles of employment equity. Saint Mary's University encourages applications from qualified women, visible minorities, Aboriginal people, and people with disabilities. Preference will be given to Canadian citizens and permanent residents of Canada."

Strategies to encourage self-identification include:

- i. Informing applicants why the information is being collected and that it is confidential,
- ii. Incorporating more equity and diversity language in the job advertisement,
- iii. Inclusion of equity and diversity related criteria; and
- iv. Enhancing recruitment efforts to better target and appeal to applicants from the FDGs.

SELF-IDENTIFICATION QUESTIONNAIRE – see appendices

SUPPORTIVE AND INCLUSIVE WORKPLACE

Saint Mary's university strives to create a supportive workplace for all members of the SMU community. The following examples contribute to an inclusive environment:

- Conflict Resolution and the Prevention and Resolution of Harassment in the Workplace (training and workshops provided)
- Violence in the Workplace: Prevention and Response (training and workshops provided)
- Bystander Training
- Safety Policy (training and workshops provided)
- Safe and Respectful SMU (Declaration of Respect)
- Strategic Priority of Intercultural Learning
- Smudging Protocol
- Land Acknowledgement
- Prayer rooms
- On campus daycare
- SUB plans for pregnancy and parental leave
- All gender washrooms
- Multi-faith chapel
- President's Committee on Racism

MONITORING OF A SUPPORTIVE AND INCLUSIVE ENVIRONMENT

Saint Mary's University continues to seek ways to improve its work environment to ensure it is supportive and inclusive. As with all faculty and staff, Chairholders are encouraged to meet with the Diversity and Inclusion Advisor to discuss any equity-related concerns. The Diversity and Inclusion Advisor keeps record of all concerns and reports them to the Associate Vice-President Research, the Vice-President Academic and Research and the Senior Director, Human Resources.

In the future, Human Resources will conduct exit interviews with all departing chairholders.

RETENTION

Historically, the University has been successful in retaining its Canada Research Chairs. Through the monitoring processes outlined above, necessary support systems will be identified and addressed. The University provides supports to assist Chairholders' transition to a faculty position at the end of their term.

Exit surveys will be conducted for all full-time faculty members, including Chairholders who resign. The exit survey includes questions on related to EDI. The findings are summarized and reported to the HR Senior Director for follow-up as necessary.

CONCERNS/COMPLAINTS

There are a number of mechanisms at SMU to address concerns related to equity and diversity, depending on the issue:

- Concerns related to Research can be addressed to the Associate Vice-President, Research and Dean, Faculty of Graduate Studies and Research.
- Concerns related to equity, diversity, and inclusion can be directed to the Diversity and Inclusion Advisor, Human Resources Department.
- Concerns related to the Policy on Conflict Resolution and the Prevention and Resolution of Harassment and Discrimination are directed to the Conflict Resolution Advisor.

CONTACT INFORMATION

Contact Information for Questions About this CRC EDI Action Plan:

Adam J. Sarty, Ph.D.
Associate Vice-President, Research
Dean, Faculty of Graduate Studies and Research
Saint Mary's University
Atrium Building, Room 210
923 Robie Street
Halifax, NS B3H 3C3
Canada

Contact Information for Questions About Equity, Diversity and Inclusion:

Deborah Brothers-Scott
Diversity and Inclusion Advisor
Saint Mary's University,
129 McNally South
923 Robie Street
Halifax, NS, B3H 3C3
902-496-8265

APPENDIX A:

Saint Mary's University Canada Research Chairs Self-Identification Questionnaire



One University. One World. Yours.

Saint Mary's University Canada Research Chairs Self-Identification Questionnaire

Thank you for your interest in Saint Mary's University.

Saint Mary's encourages applications from all who will contribute to the diversification of the workforce. Specifically, women, Indigenous persons, members of visible minorities and persons with disabilities.

The self-identification survey is voluntary, and the information is separate from your application. All responses to this questionnaire will be held in strict confidence within the Diversity and Inclusion Office. The data collected will be used in aggregate reporting to the Tri-Agency Institutional Programs Secretariat (TIPS). It is important to note that you can self-identify as belonging to more than one group.

If you have any questions or concerns, please contact:

Deborah Brothers-Scott
Diversity and Inclusion Advisor
Human Resources Department
902-496-8265
Email: Deborah.Brothers-Scott@smu.ca



One University. One World. Yours.

Self-Identification Questionnaire

Applicants for Canada Research Chairs Recruitment

Thank you for your interest in a Canada Research Chair position at Saint Mary's University. As part of the recruitment process we ask that you provide us with the following information.

Name: [Click here to enter text.](#)

Date: [Click here to enter text.](#)

Department and Title of position applied for:

[Click here to enter text.](#)

Section 1- Statement of Canadian Status (Required Information)

The University must comply with federal government requirements regarding recruitment of foreign academics and give priority to qualified Canadian Citizens and permanent residents, whether in Canada or abroad.

Are you a Canadian Citizen or permanent resident of Canada and legally entitled to work in Canada for any employer?

Yes

No

Signature: [Click here to enter text.](#)

Section 2- Self-Identification (Voluntary Information)

1. Gender

Select the option that you identify with.

Woman

Man

Gender fluid, non-binary, and/or two spirit

I prefer not to answer

2. Indigenous Identity

Do you identify as Indigenous; that is First Nations (North American Indian), Métis or Inuit.

Yes

No

I prefer not to answer

If "Yes", select the options that you identify with.

First Nations

Métis

Inuit

3. Visible Minorities

Do you identify as a member of a visible minority in Canada?

Note: Visible minority refers to whether a person belongs to a visible minority group as defined by the Employment Equity Act and, if so, the visible minority group to which the person belongs. The Employment Equity Act defines visible minorities as "persons, other than Aboriginal peoples, who are non-Caucasian in race or non-white in colour".

Yes No I prefer not to answer

If "Yes", select the options that you identify with.

- | | |
|-----------------------------------|---|
| <input type="checkbox"/> Arab | <input type="checkbox"/> Korean |
| <input type="checkbox"/> Black | <input type="checkbox"/> Latin American |
| <input type="checkbox"/> Chinese | <input type="checkbox"/> South Asian (e.g., East Indian, Pakistani, Sri Lankan, etc.) |
| <input type="checkbox"/> Filipino | <input type="checkbox"/> Southeast Asian (including Vietnamese, Cambodian, Laotian, Thai, etc.) |
| <input type="checkbox"/> Japanese | <input type="checkbox"/> West Asian (e.g., Iranian, Afghan, etc.) |

4. Disabilities

Do you identify as a person with a disability?

Note: Person with a disability is a person who has a long-term or recurring physical, mental, sensory, psychiatric or learning impairment and:

- Who considers themselves to be disadvantaged in employment by reason of that impairment, or
- Who believes that an employer or potential employer is likely to consider them to be disadvantaged in employment by reason of that impairment; and includes persons whose functional limitations owing to their impairment may have been accommodated in their current job or workplace.

Yes No I prefer not to answer

Thank you for completing this survey.

Please return this form to:
Deborah Brothers-Scott
Diversity and Inclusion Advisor
Saint Mary's University
Deborah.Brothers-Scott@SMU.ca

APPENDIX B:

Workforce Analysis: Full-Time Faculty (March 31, 2019)

Workforce Analysis Full-time Faculty
EEOG 03, NOC 4011 University Professors and Lecturers
March 31, 2019

Response Rate for the Workforce Survey

| | Total # Faculty Members | Total # Responses | Response Rate |
|-----|-------------------------------|----------------------|------------------|
| SMU | 280 | 237 | 85% |

Internal Representation of Full-Time Faculty at Saint Mary's University

| | Internal Representation | | Expected Representation | | GAP # |
|---------------------------------------|-------------------------|------|-------------------------|------|----------|
| | # | % | # | LMA | |
| Total Full-time Faculty (FT) = 280 | | | | | |
| Indigenous Peoples | 1 | .5 | 4 | 1.3 | 3 |
| Persons with Disabilities | 19 | 7.0 | 11 | 3.8 | - |
| Visible Minorities | 50 | 18 | 54 | 19.1 | 4 |
| Women | 119 | 42.5 | 121 | 43.3 | 2 |

NOC 4011 University Professors and Lecturers

Total 81,555: visible minorities 15,540 (19.1%) women 35,300 (43.3%) Indigenous peoples 1,035 (1.3%) persons with disabilities 3,099 (3.8%). Workforce availability estimates for women, Indigenous peoples and members of visible minorities are derived by the Labour Program from statistics collected by Statistics Canada in the 2011 National Household Survey (NHS). Estimates for persons with disabilities are derived by the Labour Program from statistics collected by Statistics Canada in the 2012 Canadian Survey on Disability (CSD).

The availability benchmarks are derived from estimates of workers with relevant recent experience. As a result, the workforces for women, Indigenous peoples and members of visible minorities were derived from the non-student population aged 15 and over who worked sometime within the 17 months previous to the NHS. The labour market workforce of persons with disabilities was derived from the population aged between 15 and 64 who worked any time in 2011 or 2012.

APPENDIX C:

ARTICLE 10.4 FROM SMU/SMUFU COLLECTIVE AGREEMENT

POSITIVE ACTION TO IMPROVE THE EMPLOYMENT OF WOMEN, ABORIGINAL PEOPLES,
VISIBLE MINORITIES, AND PEOPLE WITH DISABILITIES

10.4.1

The parties to this Agreement are committed to the objective of equal opportunities through positive action to improve the employment of women, aboriginal peoples, visible minorities and people with disabilities in the university community.

10.4.2

The Employer will determine, in consultation with each academic unit, whether or not there are serious imbalances in the composition of Employees with respect to the four groups specified in 10.4.1 within the academic unit. Where it has been determined that a serious imbalance exists, reasonable goals shall be established to address the imbalances. The results of these actions shall be reported in writing as outlined in 10.4.8.

10.4.3

Prior to making any appointment, the Employer shall make a positive attempt to recruit women, aboriginal peoples, visible minorities, and people with disabilities as candidates.

10.4.4

The Selection Committees referred to in 10.1.20(d) and 10.2.30 shall include at least one member from one of the groups specified in 10.4.1. Where there are no members of a particular specified group employed in an academic unit, a replacement Employee from one of the specified groups will be selected from a cognate unit.

10.4.5

Evaluation of candidates shall be based solely on the requirements of the prospective job, for Faculty Members as per Article 10.1.20 and for Librarians as per Article 10.2. The candidate who is clearly the best shall be recommended, but when candidates are judged to be equal, the best candidate with respect to the four groups specified in 10.4.1 shall be recommended until the academic unit has met the goals suitable under Article 10.4.2.

10.4.6

In forwarding the recommendation of a specific candidate for appointment to the Dean, the Selection Committee shall include a report outlining its actions with respect to Articles 10.4.1 to 10.4.5.

10.4.7

In reviewing the Selection Committee's recommendation, the Dean, or University Librarian when the appointment is to a librarian position, shall consider the recommendation in the context of the requirements outlined in Articles 10.4.1 to 10.4.5.

10.4.8

The Employer shall report in writing annually to Senate and to the Board of Governors by 1 December, on actions taken to improve the employment of members of the four groups specified in 10.4.1 in the university community, and in particular the development and implementation of the hiring goals required for academic units. Such reports shall also be forwarded to the Union.

10.4.9

Members of the committees referenced in Articles 10.1.20 (d), 10.1.30, 10.2.30, and 11.1.40 shall be required to participate in University-provided equity training before commencing their work.

APPENDIX D:

CRC Environmental Scan – Open-Ended Questions

SMU Canada Research Chairs Consultations

1. What are some of the best practices that you are aware of, or have experienced, related to the promotion of Equity, Diversity and Inclusion (EDI) at SMU?
2. What do you think are some of the barriers to recruiting and retaining diverse faculty at SMU?
3. Can you describe your experience applying for, and being nominated for, your Canada Research Chair at SMU?
4. Do you have any recommendations for improving that application and nomination process?
5. Do you feel SMU has an inclusive environment (i.e. do you feel a sense of belonging)?
6. What do you advise as being necessary to support the success of EDI related to the Canada Research Chair program, and research in general, at SMU?
7. What do you see as some of the challenges to advancing EDI within this research ecosystem at SMU?
8. Do you feel sufficiently supported as a CRC at SMU?
 very satisfied satisfied moderately satisfied dissatisfied

Please elaborate on your response:

9. Is there any additional information that you would like to add to improve the research environment/culture at SMU?

Demographic Information (voluntary) - Please check all appropriate boxes

Do you identify as a man? Yes No I prefer not to answer

Do you identify as a woman? Yes No I prefer not to answer

Do you identify as a Gender fluid, non-binary, and/or two spirit? Yes No I prefer not to answer

Do you identify as a member of a visible minority? Yes No I prefer not to answer

Do you identify as an Indigenous person? Yes No I prefer not to answer

Do you identify as a person with a disability? Yes No I prefer not to answer