



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

Updated 2024

Reporting Period: December 2022 to December 2023

Due: CRCP reviewing reporting process, no report required by CRCP

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PART A: CRCP Institutional EDI Action Plan

Key Objective 1

1.1 Brief description Key Objective 1

Results-based accountability for University of Waterloo's CRC Equity, Diversity, and Inclusion Action Plan (EAP) is supported by a strong framework for identifying, preventing, and removing barriers for Waterloo Chairholders (CRCs, C150s, CERCs), including opportunities for:

- Increasing accountability for EDI in the CRC program, and across Waterloo's campus;
- Improving collection of self-identification data from CRC applicants to better understand the composition of applicant pools and inform outreach activities;
- Assessing the current state of internal CRC practices, processes, and policies (e.g. equity/unconscious bias training, advertising/outreach, recruitment, retention, Chairholder support, and termination) to identify and address barriers to FDGs and 2SLGBTQ+ communities; and
- Introducing and expanding training related to unconscious bias, equity, diversity, and inclusion for those involved in managing Waterloo's Canada Research Chair Program (CRCP).

1.2 Systemic barriers

As discussed in the previous progress report, the barriers addressed in this objective include the need for infrastructure in support of EAP recommendations and in support of Chairholders from under-represented backgrounds; a lack of equity data; barriers in policies and practices; and ensuring that the Office of Research, Institutional Research team supporting the CRC program is supported in their roles with the most up-to-date promising EDI practices.

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

- 1.1 Improved collection of data on current Chairholders.
- 1.2 Drew on IPG funds to expand the Inclusive Research Team.
- 1.3 Expansion of training offerings for Waterloo staff, including the Institutional Research Team supporting the Canada Research Chair program.
- 1.4 Development and launch of the Inclusive Research Resource Hub.
- 1.5 Action taken on PART Recommendation 68 to "Create research awards and additional funding opportunities for Black and Indigenous faculty researchers."
- 1.6 Publication of the Research Data Management Institutional Strategy and Implementation Plan.

Other related actions implemented:

- 1.7 Relaunched the Research Equity, Diversity and Inclusion Council.
- 1.8 Launched training for Waterloo Awards Committee.

1.4 Data gathered and Indicator(s)

Data Gathered:

- The 2023 CRC survey response rate was 63%.
- 10 EDI training sessions were held for the staff in the Office of the Vice-President, Research and International (OVPRI). Combined, attendance at these sessions was 450. Quantitative and qualitative data from the feedback surveys indicate satisfaction with the sessions.
- 190 resources are available on the Inclusive Research Hub to support the Waterloo community including Chairholders in fostering an inclusive research environment.
- Approximately 1,000 views of the Inclusive Research Resource Hub during the reporting period.
- [Director, Indigenous Faculty Relations](#) was hired.
- As outlined in the [Provost's Advisory Committee on Building a Resilient Waterloo](#), an Associate Provost, Campus Support and Accessibility role was announced, and a search is underway.
- The search for an Associate Director, Equity role with a focus on gender equity commenced.
- The Office of Indigenous Relations Strategy was published including a vision for Indigenous Research.

Indicators:

- Increase in capacity to support EDI in the OVPRI.
- Increase in capacity to support CRC EDI activities.
- Specialized supports are available for Indigenous Chairholders.
- Actions have been taken to improve EDI in terms of supports for Chairholders from under-recognized groups, as described below.
- Actions have been taken to improve EDI and decolonization in terms of institutional actions, as described below.
- The CRC survey was conducted, including a comparative review of institutional support and equity climate environment scan, in addition to a needs assessment and demographics distributed to Chairholders.
- Expansion of EDI training sessions for staff in the OVPRI.
- Launch of the Inclusive Research Resource Hub.
- Launch of the Research Data Management Institutional Strategy and Implementation Plan.
- The search for an Inclusive Awards Officer role commenced.

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

Over the course of the reporting period, the University of Waterloo drew on Incremental Project Grant (IPG) funds to continue to build the Inclusive Research team. This team leads EAP implementation, directly supports Chairholders, helps to identify, prevent, and remove barriers, and assists with the implementation of processes developed to manage meeting Waterloo's CRC equity targets. The Inclusive Research team works with other units across the University, allowing us to collectively support EDI implementation and systemic change. Additionally, the University's two cluster hires, one focused on Black researchers and the other Indigenous researchers, was ongoing.

Corresponding Action 1.1: Improved Collection of Data on Current Chairholders

To ensure we are receiving regular anonymous feedback from Chairholders, Waterloo has decided to conduct a CRC survey bi-annually. The survey includes four sections: an equity climate environment scan, a comparative review of institutional support, a needs assessment, and demographics. The purpose of this enhanced data collection is to get a better understanding of CRC experiences at Waterloo, their access to institutional support, what supports they need most, and to check for inequities in any of these areas. Initial findings indicate Chairholders are satisfied overall with their experience at Waterloo however, the findings also indicated where more support is wanted, and this will help shape upcoming offerings.

As well, since the previous reporting, institutional equity data has been released, but collection is ongoing to improve the response rate and ensure that new members of the Waterloo community can have their data included. This data has been and will be used to inform efforts to identify gaps in programs, services, and policies, thereby helping to remove systemic equity and anti-racism barriers that impact UWaterloo community members. Results of the previous survey led to significant changes that have shaped our institution and fostered a stronger community (discussed below). Policies and practices are on a continuous improvement trajectory, but work remains to be done. Two-page summaries of the employee data and student data were released.

Corresponding Action 1.2: Drew on IPG Funds to Expand the Inclusive Research Team

The OVPRI has continued to expand the Inclusive Research team, drawing on IPG funding and the CRC stipend. This team helps to develop and implement inclusive research strategies, support the CRC EAP, and provide oversight of the CRC EAP program delivery. Specialized support for Indigenous Chairholders at Waterloo is available to advance their research programs, including grant application and reporting support, community-building and event logistical support, and identifying and addressing barriers experienced by Indigenous faculty members in the research ecosystem.

The Inclusive Research team has thus been able to undertake significant work with Chairholders, and – in keeping with an ethos of fostering a climate of equitable research excellence – by extension all researchers. A detailed discussion of these activities appears under Objective 3.

Corresponding Action 1.3: Expansion of Training Offerings for Staff Including the Institutional Research Team Supporting the CRCP at Waterloo

The Inclusive Research Team delivers EDI training for the staff in the OVPRI, occasionally bringing in outside expertise. Attendees include the Institutional Research Team supporting the CRCP at Waterloo, and those who interact with Chairholders and other faculty such as research ethics and research finance staff. The Institutional Research Team supporting the CRCP at Waterloo prioritizes attending the events. The intention of the training is to support all staff with the tools to identify and address barriers in the program and the research ecosystem at Waterloo more broadly. The increased capacity of the Inclusive Research Team that occurred over the last and current reporting period has enabled the delivery of 10 trainings (on a monthly basis with a break over the summer months).

Trainings have focused on topics including decolonization; inclusive language and communications; inclusive hiring practices; the role of self-identifiers and pronouns in creating an inclusive culture; approaches to inclusive leadership; queer inclusion as decolonization; inclusive language; power, privilege, and prejudice; and the First Nations Information Governance Centre's OCAP® training. The ongoing provision of these trainings completes PART Recommendation 69, "provide training for staff who support the administration of research, especially for projects with Indigenous, Black, and racialized communities." An ongoing and robust training program to support researchers, including Chairholders, is now established and embedded into the planning of the Inclusive Research Team.

Corresponding Action 1.4: Development and Launch of the Inclusive Research Resource Hub

The Hub is a repository with documents, videos, and links to resources on equity, diversity, inclusion in research practice and design. Some of the topic areas include gender-based analysis; recruitment, hiring, and retention; Indigenous research; and decolonization. Its purpose is to ensure that all Waterloo faculty, students, and staff have equitable access to curated resources that can support them as they build inclusive work environments and practices for their research team, research participants, and research partners.

Corresponding Action: 1.5 Create Research Awards and Additional Funding Opportunities for Black and Indigenous Faculty Researchers (Implementation of PART Recommendation 68)

Of the President's Anti-Racism Task Force (PART) Report's 88 recommendations, 9 of are assigned to the OVPRI. Particularly relevant to Objective 1 is Recommendation 68: "Create research awards and additional funding opportunities for Black and Indigenous faculty researchers (e.g., support for open-access publication fees; recruitment of Highly Qualified Personnel (HQP); mentorship or networking events; fellowships, research awards and other opportunities for research advancing culturally diverse ways of learning and knowing; and community-based research)." To this end, the process of hiring an Inclusive Awards Officer commenced during the reporting period, and the successful candidate will lead activities for Recommendation 68 with the support of the Inclusive Research Team. In addition, bespoke training was created and will be delivered annually to the Waterloo Awards Committee to foster inclusive discussion and practices in decision-making.

Corresponding Action 1.6: Publication of the Research Data Management Institutional Strategy and Implementation Plan

The [Research Data Management Institutional Strategy and Implementation Plan](#) was released during the reporting period. The purpose of this strategy is to support research excellence and create a foundation for building research data management services and tools for all Waterloo researchers including all faculties and units. The strategy recognizes and respects the sovereignty of Indigenous Peoples, Nations, and communities over research data produced by, with, for, and about them. This includes sovereignty over the collection, use, control, access, possession, and sharing of these data, as discussed in the First Nations Information Governance Centre's OCAP® Principles. The strategy is relevant to all research utilizing and producing research data in all forms (including, but not limited to, digital, analogue, paper, and physical materials)—whether funded or unfunded, published or unpublished, open or restricted. The strategy covers all data collection including data collected by staff. As such, this strategy will support ethical management of equity and other data collected at Waterloo.

1.6 Challenges encountered during the reporting period

- There was a lower CRC survey response rate from Chairholders compared to the previous reporting period. There were other similar surveys being conducted by the university at the time, which may have led to survey fatigue. As higher response rates improve the usefulness of data, planning for the 2025 survey will include strategies to improve response rates. Analysis of survey results is ongoing, and high-level learnings will be reported in the next progress report.
- The timings of the training sessions for the OVPRI staff were not accessible for some teams. Accordingly, we began to vary the days and timings of offerings, as well as to move to virtual trainings, wherever appropriate, to enable participation.

1.7 Next Steps

In the Dec 2023-Dec 2024 reporting period, numerous initiatives are underway or will be undertaken:

- The CRC survey data collected during the reporting period will be further analyzed and shared with Chairholders and senior administrators. Findings will be used to inform support offered to Chairholders, particularly those from equity-deserving groups, and EDI actions moving forward. Using the data gathered in the survey, the Inclusive Research Team will create an internal report of recommended actions to address barriers and strive for continuous improvement in alignment with this objective. As discussed above, the review of institutional supports and the environmental scan will continue to be combined into a single bi-annual survey along with the demographics and a needs assessment. The next survey will be administered in fall 2025.
- When detailed survey results are available, CRC data will be cross-referenced with the institution-wide equity survey to assess discrepancies between Chairholders and other faculty members. This analysis will help us understand any additional barriers or contexts as they impact faculty across the University. A better understanding of where the barriers lie will ensure that they are addressed effectively and efficiently.
- The Inclusive Research Team will continue delivering monthly EDI training sessions for office staff, including the Institutional Research Team supporting the CRC program.
- The Inclusive Research Team will continuously update the Inclusive Research Resource Hub to ensure that materials are up to date.
- An Inclusive Awards Officer will be hired to lead the activities for PART Recommendation 68. Once the Officer is hired, the next step is to begin project proposals for new funding and/or award development that meets the needs of the community.
- The [Research Data Management Institutional Strategy](#) implementation projects are underway and will continue throughout the next reporting period. Examples of activities include setting up an Indigenous Data Sovereignty framework and governance structure and reviewing existing research policies, procedures and guidelines for their alignment with Indigenous Data Sovereignty principles.
- The Inclusive Research Team will support the development of the equity action plans for the Canada Excellence Research Chairs by providing resources, consultations, and reviews.

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

As proposed, a Research Equity Advisor – CRC Program was retained with a primary mandate to support the CRC EAP objectives and support EDI principles in the administration of the CRC program. The stipend was used as salary support for the role, which was retained as a two-year contract (with a commitment to continuing investment from the Office of Research), from September 2022 through August 2024, and then

extended to January 2025. The net-new addition of this dedicated resource provides skilled oversight and proactive support to achieving the CRC EAP goals. The results will include a highly efficient EAP workplan with clear accountability focused on achieving and surpassing EAP commitments, while ensuring the CRC environment is based on belonging and inclusive excellence.

Please note that this role has been critical for all key achievements related to the objectives, but we will not repeat this information below.

EDI Stipend Impact Rating: Extensive

Leveraged cash or in-kind contributions from your institution: \$46,000

Key Objective 2

2.1 Brief description of Key Objective 2:

Ensure equitable management of Waterloo's CRC positions through:

- Improving hiring and outreach practices to increase representation from the FDGs in Waterloo's CRC complement.
- Introducing procedural changes to increase transparency and equity in recruitment of Chairholders.
- Introducing measures to ensure that individuals from the FDGs are not disadvantaged in negotiations related to institutional support.

2.2 Systemic barriers

As discussed in the previous progress report, this objective addresses systemic barriers including those to equitable recruitment and equitable negotiation of institutional support.

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

- 2.1 Train faculty and departmental review committees on how to evaluate non-Western based (particularly, Indigenous) research, teaching and service and evaluate bodies of work with an appropriate lens (Implementation of PART Recommendation 21).
- 2.2 Identify research funding sources and allocation practices on current levels of institutional support for research by Indigenous, Black, and racialized scholars, and ensure consistent startup funding offers and disbursements (Implementation of PART Recommendation 64).
- 2.3 Continued use of improved communications practices.
- 2.4 Continued use of equitable negotiation best practices.
- 2.5 Continued use of equitable recruitment best practices.

2.4 Data gathered and Indicator(s)

Data:

- 100% of Selection Committee members and Internal Review Committee (IRC) members completed the Equitable Faculty Recruitment and Selection training.
- 100% of Selection Committees used CRC equitable hiring guidelines and resources to support following equitable advertising, recruitment and selection processes for CRC hiring.

Indicators:

- University of Waterloo did not meet its 2023 CRC EDI targets, specific areas not met include Tier 1 women and gender minorities. Our institution is on track to meet 2029 EDI targets by December 2026.
- SharePoint site to share information about the CRCP equitably with all Chairholders is updated regularly.
- Guidance on equitable recruitment and hiring has been shared with Selection Committees and consultations are available to any committee.

2.5 Outcomes and Impacts made during the reporting period

Corresponding Action: 2.1 Train Faculty and Departmental Review Committees on how to evaluate non-Western based (particularly, Indigenous) research, teaching and service and evaluate bodies of work with an appropriate lens (Implementation of PART Recommendation 21)

The process of assessing training needs and conducting a review of best practices and current literature began during the reporting period.

Corresponding Action: 2.2 Identify research funding sources and allocation practices on current levels of institutional support for research by Indigenous, Black, and racialized scholars, and ensure consistent startup funding offers and disbursements (Implementation of PART Recommendation 64)

During the reporting period, needs were explored and the Research Finance unit in the Office of the Vice-President, Research and International was engaged to begin implementation of this recommendation.

Corresponding Action: 2.3 Continued use of Improved Communications Best Practices

As discussed in the last progress report, the Institutional Research team supporting the CRCP at Waterloo continues to build on its communication best practices, particularly with the ongoing updating of the CRC SharePoint site, which centralizes all instructions and requirements, both for nominees and for CRC Selection Committees.

Corresponding Action: 2.4 Continued use of equitable negotiation best practices

As discussed in the last progress report, Waterloo has established set institutional commitments for Tier 1 and Tier 2 Chairholders. These policies address appointment considerations, Chairholder duties, leave requirements, and financial details. All selection committee chairs and nominees are made aware of these policies and procedures.

Corresponding Action: 2.5 Continued use of equitable recruitment best practices

As reported in the last progress report, Waterloo has adopted new and inclusive hiring processes. Guidance on equitable and inclusive recruitment and hiring is shared with hiring committees.

2.6 Challenges encountered during the reporting period

- Challenges implementing PART Recommendation 21 include determining the most appropriate medium for and approach to the development of the training.
- Challenges implementing PART Recommendation 64 include the significant differences in each Faculty's funding needs and norms, as well as the confidential nature of faculty members' contracts.

2.7 Next Steps (indicate specific dates/timelines)

In the Dec 2023-Dec 2024 reporting period, numerous initiatives are underway or will be undertaken:

- Equitable recruitment guidance and toolkits will continue to be updated as best practices evolve, and inclusive recruitment, selection, hiring, and communication best practices will continue.
- For PART Recommendation 21, the needs assessment will be completed, and the development of the training will begin.
- Work on PART Recommendation 64 will continue, including engagement to better understand the allocation of start-up funds, which will be used to inform recommendations on promising practices to ensure equity among new faculty.
- A review of the current CRC EAP will be undertaken and, if complete, engagement will begin on updating to a new and revised version of a CRC EAP for 2025-2030.

Key Objective 3

3.1 Brief description of Key Objective 3

Support an inclusive work environment for all Waterloo Chairholders, including those from the FDGs and the 2SLGBTQ+ communities, with recognition of intersecting identities by:

- Promoting equity-related education/learning opportunities.
- Developing policies and procedures that are conducive to equity, diversity, and inclusion.
- Providing a more supportive and inclusive workplace for Chairholders overall.

3.2 Systemic barriers

As discussed in previous progress report, the systemic barriers addressed by this objective include the need for further educational opportunities; ongoing policy development and refinement that is EDI-informed; and developing strategies to foster an inclusive environment.

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

- 3.1 Providing educational opportunities for Chairholders, including the launch of the Building Inclusive Research Capacity (BIRC) training program.
- 3.2 Providing CRC networking opportunities and assessing need for expansion.
- 3.3 Launching an inclusive mentorship program pilot, Building Reciprocal and Inclusive Dialogues (BRAID).
- 3.4 Providing 1:1 support for Indigenous Chairholders.
- 3.5 Capacity building to support Indigenous research and researchers (Implementation of PART Recommendations 23, 24 & 25).
- 3.6 Consultations with Black and Indigenous faculty to identify and address barriers in the Waterloo research ecosystem (Implementation of PART Recommendation 63).

3.4 Data gathered and Indicator(s)

Data:

- Training opportunities:
 - Four training sessions for Chairholders were held. Total attendance was 28 Chairholders. Quantitative and qualitative feedback on the training sessions indicate overall satisfaction.
 - The Building Inclusive Research Capacity program launched, which contributed to the 10 training sessions that were held for faculty members (including Chairholders). Total attendance at these training sessions was

- approximately 300. Quantitative and qualitative feedback indicate satisfaction with the sessions.
- One half-day session by external experts on creating inclusive excellence in research through inclusive leadership was offered.
- First Nations Information Governance Centre's "Ownership, Control, Access, and Possession" (OCAP®) was offered twice.
- Networking opportunities:
 - Two networking sessions were held for Chairholders who identify as women and gender minorities.
 - One networking session for Indigenous Chairholders was held.
 - One networking session for all Chairholders was held.
 - Attendance at all networking sessions held during the reporting period was 26.
 - Qualitative feedback and engagement at the networking sessions indicate that attendees were satisfied with the networking sessions. The networking sessions were well-received and meaningful, engaged discussion was held, with feedback in terms of challenges experienced and topics for future meetings.
- Mentorship pilot program:
 - 26% of Chairholders joined the BRAID mentorship program pilot.
 - Qualitative data collected from BRAID participants four months into the pilot program indicate need for more structure and support with mentorship partnerships.

Indicators:

- Implementation of and Chairholder participation in training sessions.
- Chairholder participation in networking sessions.
- Implementation of and Chairholder participation in the BRAID mentorship pilot program.

3.5 Outcomes and Impacts made during the reporting period

The Waterloo Strategic Plan, "Connecting Imagination with Impact" (2020-2025) states that one of its goals is to "Promote and support Indigenous initiatives and a culture of equity, diversity, inclusion, and anti-racism for all." The VPRI Strategic Research Plan, "Our Connected World" (2020-2025) has a stated goal of "Fully implement equity, diversity and inclusivity across the research enterprise." These goals provide the foundation upon which CRC EAP implementation is built. In addition to the actions described above that support an inclusive workplace, over the reporting period, we have focused on providing significant educational opportunities and tailored networking and support opportunities for Chairholders, with a particular focus on equity deserving group members.

Corresponding Action: 3.1 Providing educational opportunities for Chairholders, including the launch of the Building Inclusive Research Capacity training program.

The Waterloo Inclusive research faculty training program, Building Inclusive Research Capacity Program (BIRC), launched during the reporting period. The program, delivered by the Inclusive Research Team, includes webinars and resources to support researchers as they implement inclusive practices into their research and teams. Topics included building inclusive teams, identifying barriers to inclusion, gender-based analysis (GBA+), as well as grant-specific trainings.

Chairholders had access to BIRC as well as to CRC-specific programming. The CRC-specific trainings aligned with those for all faculty, and included time management for researchers, but provided opportunities for Chairholders so that their particular contexts could be addressed. The sessions were fruitful, and the discussions that arose were rich.

Additional trainings were offered by external experts, including a half-day session on creating inclusive excellence in research through inclusive leadership as well as two offerings of the First Nations Information Governance Centre's (FNIGC) "Ownership, Control, Access, and Possession" workshops (OCAP®).

Corresponding Action: 3.2 Providing CRC Networking Opportunities and assessing need for expansion

As discussed in previous progress report, the CRC Women and Gender Minorities' Networking (formerly Women's Networking) sessions have continued to be offered twice per year. These are forums for Chairholders who self-identify as women and gender minorities to get to know each other, discuss challenges and strategies, and to raise concerns with leadership. These meetings prioritized connecting women and gender minority-identified Chairholders as well as providing program updates. These sessions gave attendees an opportunity to flag barriers they were experiencing to the Inclusive Research Team and the Vice-President, Research and International, which staff could work to address, and have led to a stronger sense of community among Chairholders. The Institutional Research team supporting the CRC Program and the Inclusive Research team were also available to answer questions or concerns that Chairholders raised.

A networking opportunity was held for Indigenous Chairholders, which focused on building relationships between Indigenous Chairholders, and the supports offered by the Office of the Vice-President, Research and International. A session for all Chairholders was also held, and it focused on giving Chairholders an opportunity to connect about their research. Regular one-on-one meetings between Chairholders with disabilities and the Vice-President, Research and International took place. The needs assessment in the survey will be used to understand the needs of all Chairholders and may lead to the further expansion or review of CRC networks.

Corresponding Action: 3.3 Launching an inclusive mentorship program pilot, Building Reciprocal and Inclusive Dialogues (BRAID)

The CRC inclusive mentorship program pilot was developed in response to needs identified in the 2021 review of institutional support, which reflects research showing that FDG group members may have a harder time finding mentors than non-FDG counterparts (e.g., Casad et al., 2021). During the reporting period, BRAID was developed with an emphasis on mentorship partnerships that recognize the important knowledge and contributions for both parties in the partnership. The program launched, and participants were matched based on their priorities. The Inclusive Research Team also developed resources to support inclusive mentorship, which were provided to the group. One BRAID-specific networking event and a check-in occurred during the reporting period, with more events scheduled for the next reporting period.

Corresponding Action: 3.4 Providing 1:1 Support for Indigenous Chairholders

One-on-one support continued to be provided for Indigenous Chairholders and is ongoing. This support includes addressing systemic barriers, grant application planning and review, assistance with setting meetings and follow-up tasks related to their research agendas, review of CRC renewal criteria and long-term research planning, and other supports as requested. The Inclusive Research Team also liaised with the Institutional Research Team supporting the CRC Program to provide context on Indigenous perspectives related to Indigenous Research programs carried out as a Chairholder.

Corresponding Action: 3.5 Capacity Building to Support Indigenous Research and Researchers (Implementation of PART recommendations 23, 24, and 25)

PART Recommendation 23 is to “mandate training for all non-Indigenous faculty members, staff, and students engaging in Indigenous research.” During the reporting period, the project was planned and an environmental scan on existing trainings on Indigenous Research was conducted.

PART Recommendation 24 is to “consult with Indigenous community members who have existing relationships with the University (including staff, students, and faculty), to create a policy on conducting research with Indigenous communities and on Indigenous land and waters.” During the reporting period, the project charter was created, an environmental scan of research practices at U15 universities was conducted, and an internal policy scan of the policy development pathway at the University was completed.

PART Recommendation 25 is to “ensure representation of different ways of knowing and being; equity, diversity, inclusion and anti-racism training; and best practices for the Research Ethics Board membership, so it has the capacity to support, assess, and approve ethics requests for research which impacts or involves racialized communities, with particular emphasis on Indigenous communities.” During the reporting period, the process for hiring an Indigenous Research Ethics Manager was initiated.

PART Recommendation 22 (“create a Centre or Institute for Indigenous Research Excellence”) is on hold while institutional policies regarding Centres and Institutes are undergoing review.

Corresponding Action: 3.6 Consultations with Black and Indigenous Faculty to Identify and Address Barriers (Implementation of PART Recommendation 63)

Recommendation 63 of PART is to “undertake a consultation process to learn about and address research barriers and particular needs of Black, Indigenous, and other racialized researchers, including a review of recent research in this field.” During the reporting period, a literature review of barriers experienced by underrecognized faculty in academia was conducted, and the process of hiring and onboarding an external consultant for further engagement began.

3.6 Challenges encountered during the reporting period

While CRC training feedback was positive, it also indicated that Chairholders wanted to prioritize networking opportunities, rather than CRC exclusive training. As a result, Chairholders have been given priority access to Inclusive Research training activities to enable an emphasis on networking events (see next steps section).

In recognition of gender-based discrimination for gender minorities and in alignment with the Tri-Agencies, the former “CRC Women’s Networking group” has been renamed the “Women and Gender Minorities Networking group.”

Initial feedback indicates that some BRAID mentorship program participants would benefit from more structure in the program. This feedback will be incorporated into the evaluation and will be reviewed as part of the broader evaluation of the program.

A challenge in implementing the PART Recommendations is that they require extensive consultations with Black, Indigenous, and other racialized researchers. To reduce the risk of over-burdening researchers, who, studies show, are already asked to do extra service work, we are collaborating across recommendations as much as possible, and working with faculty members to determine their preferred engagement methods.

3.7 Next Steps (indicate specific dates/timelines)

- Pivot from a training plan for Chairholders to networking opportunities, given the feedback provided by Chairholders. Chairholders have been given priority access to training activities to enable an increase in networking events.
- Planning for a two-part workshop dedicated to building an EDI plan in support of grant proposals has commenced. All faculty are encouraged to attend, and there are reserved spots for Chairholders.
- Networking sessions will continue and may expand, pending needs assessment results.

- A networking session with Chairholders with disabilities to discuss what will best meet their needs will be held in the next reporting period.
- Indigenous Chairholders will continue to have access to 1:1 support from the Indigenous Research Team.
- A networking event and webinar on inclusive mentorship for the BRAID mentorship program participants is planned. The program pilot will close in Spring 2024 and evaluation will commence to ensure that it is meeting the needs of Chairholders, particularly those who are members of FDGs. The evaluation will inform decisions on the sustainability of the program.
- For PART Recommendation 23, a survey about Indigenous Research training needs will be developed and launched, and the data will be analyzed.
- For PART Recommendation 24, community consultations will be conducted to better understand Indigenous research policies and guidelines and development of the policy will commence.
- For PART Recommendation 25, the Research Ethics Board Terms of Reference will be reviewed, and training modules will be developed.
- For PART Recommendation 63, an external facilitator will be hired and onboarded to conduct faculty consultations and provide a thematic report.

PART B: Challenges and Opportunities

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

COVID-19 impacted how we worked and connected across teams and with Chairholders at the University of Waterloo. Throughout the reporting period, many formerly face-to-face activities had transitioned to either virtual or hybrid meetings as understood as the newly accepted expectations of doing business. The University of Waterloo continues to encourage best health practices, including good hand hygiene, maintaining a mask-welcome environment, and encouraging individuals to stay home when they feel sick / unwell.

A hate-motivated attack took place on our campus on June 28th, 2023, targeted at gender diverse, 2SLGBTQIA+ individuals and women. In response, the University hosted community forums and developed an approach to [safety and culture on campus](#). This included the [Antagonism and Intimidation in Academia](#) speaker series, with four panels (two during the reporting period) on antagonism towards research topics including gender and race, science and technology, health, and climate change throughout the year. The series will culminate with a conference taking place in June 2024. Waterloo's Gender and Social Justice Program also hosted [The Urgency of Social Justice](#) to foster dialogue on a range of social justice topics including but not limited to anti-racism, anti-colonialism/decolonizing, gender and sexuality, class, and economic inequality. As mentioned above, the Equity, Diversity, Inclusion and Anti-Racism (EDI-R) office is also hiring an Associate Director, Equity with a focus on gender equity. It is expected that recommendations and initiatives will continue to emerge as the discussion continues.

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

As previously reported, given the large size of the University of Waterloo campus, both in terms of physical space and the numbers of researchers, the adoption of hybrid work and better communications platforms has helped to build a community of Chairholders. Chairholders have been offered the option of in-person or virtual interactions with the broader Office of the Vice-President, Research and International. These flexible hybrid opportunities to learn and network allowed more Chairholders to participate in programs, thanks to offering them flexibility both in terms of their own time management as well as their physical location on campus, while also respecting preferences to meet online or in person.

The efforts and successes that have been made in implementing the PART recommendations and the Equity Action Plan are mutually reinforcing. For example, the training that will be developed to fulfil PART Recommendation 21 to ensure that faculty and departmental review committees understand how to evaluate non-Western based (particularly, Indigenous) research, teaching and service, is intended to support all researchers. Chairholders at Waterloo have expressed their desire for the EAP to be catalytic and create opportunities both for Chairholders and for the broader faculty.

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

Instructions:

- **Institutions with EDI Action Plans, use this section to report on EDI Stipend objectives that are not accounted for in Section A.**
- **Institutions without EDI Action Plans, use this section to report on EDI Stipend objectives.**

EDI Stipend Objective 1

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

The main objective of the EDI stipend is to accelerate the completion of the CRC EAP objectives through the hiring of a dedicated Research Equity Advisor – CRC program.

Indicator(s): The performance indicators to monitor success of the EDI Stipend included the following three outstanding objectives of the CRC EAP:

- (1) Completed environmental scan including analysis of data themes and recommended actions, including identified actions and demonstrated progress to address previously identified gaps;
- (2) Updated self-identification data and faculty-specific actions resulting from CRC Review of Institutional Supports, resulting in a more diverse pool of Chairholders and address equitable access to institutional supports; and
- (3) Revised engagement plan with updated resources and web content addressing facts and myths associated with EDI in research, to ensure clear and open communication around research excellence and equity throughout CRC program and the research environment.

Outline the total expenditures below:

Total funds of EDI stipend spent on the objective: 50000

Institutional commitment (if applicable): 46000

Total funds spent: 96000

Table C2. EDI Stipend Impact Rating

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

Extensive

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

Between December 2022 and December 2023, there was a staffing change that required a brief onboarding process. Throughout the reporting period, the Advisor developed a training and networking events plan for Chairholders, providing some of the

deliveries and co-facilitations as well as contributing to internal trainings in the Office of the Vice-President, Research and International. They designed and administered the BRAID mentorship pilot program and began plans for the evaluation of the pilot. The Advisor designed and administered the updated 2023 CRC survey. They supported other faculty more broadly by supporting grant writing and reviews, 1:1 consultations with faculty looking to embed EDI into their labs and research, and hosting trainings for OVPRI staff who interact with researchers at Waterloo.

Given the importance of this position, we note that this funding had an “extensive” impact as it is essential in allowing us to complete the outstanding objectives of the CRC EAP at an accelerated speed, and in preparing to plan and engage on an updated EAP 2025-2030. We anticipate that it will have an “extensive” impact in the next reporting period.

Part D: Engagement with individuals from underrepresented groups

Outline how the institution has engaged with underrepresented groups: e.g., racialized individuals, Indigenous Peoples, persons with disabilities, women, 2SLGBTQ+ 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 University of Waterloo consistently and proactively solicits feedback from Chairholders, as well as those who work closely with Chairholders, to develop and evaluate our programming, and in 2023 we conducted a survey of all Chairholders that included demographic information so that we could be sure to address feedback from under-represented Chairholders.

Training sessions were developed as a direct response to Chairholder feedback received during networking sessions and through survey free form responses. Specialized supports also allow the Inclusive Research team to engage in ongoing conversations with Indigenous Chairholders about any barriers they experience and work to collaboratively develop solutions or remove barriers with them.

As discussed in the previous report, several mechanisms to facilitate CRC engagement were implemented:

- The data collected in the 2023 CRC survey preliminary findings were disaggregated by FDG. The CRC survey findings will be analyzed with an intersectional lens where possible, accounting for variation in sample sizes. The preliminary findings highlighted some of the needs of FDGs which will be addressed in future CRC programming developed in the next reporting period.
- The BRAID pilot included feedback mechanisms.
- Networking sessions, particularly the Women and Gender Minority Networking meetings, continued to allow for direct contact between Chairholders, the Inclusive Research team, and the Vice-President, Research and International. In the reporting period, a networking session for all Chairholders, Indigenous Chairholders, and 1:1 meetings between Chairholders with disabilities and the Vice-President, Research and International were held. During the reporting period, these networking sessions have resulted in barriers being identified by Chairholders and actions taken by the Vice-President, Research and International with the support of the Inclusive Research Team. These sessions will continue, and the 2023 CRC survey includes a needs assessment that will support reviewing and improving networking opportunities to best suit CRC

needs. This will assist the Inclusive Research Team in identifying and addressing barriers faced by Chairholders.

- The Research Equity, Diversity, and Inclusion (REDI) Council continues to ensure that we have administrative and faculty-level feedback from all Faculties on current and future EAP activities. It will continue to provide this key feedback in the next reporting period.

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

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

Waterloo engaged in numerous significant EDI initiatives during the reporting period:

- A [Commitment Polishing Ceremony](#) was held, in which Vivek Goel, President and Vice-Chancellor, renewed the university's commitment to "addressing our colonial legacy, and fostering a more inclusive and just future."
- The University introduced a [tuition waver](#) for incoming and current Waterloo students who are members of the Mississaugas of the Credit First Nation or Six Nations of the Grand River.
- [Equity data collection](#) is ongoing will be used to inform efforts to identify gaps in programs, services, and policies, thereby helping remove systemic equity and anti-racism barriers that impact UWaterloo community members. Results of the previous survey led to significant changes that have shaped our institution and fostered a stronger community.
- After the June 28th hate-motivated attack on our campus, the University took several actions, including,
 - hosting community forums and developing an approach to [safety and culture on campus](#);
 - developing the [Antagonism and Intimidation in Academia Speaker Series](#) to create dialogues around antagonistic responses to academic research and pedagogy. These events were jointly organized by the Faculty of Arts and the Office of the Vice-President, Research & International; and
 - the Gender and Social Justice Program hosted [The Urgency of Social Justice](#) to foster dialogue on a range of social justice topics including to anti-racism, anti-colonialism/decolonizing, gender and sexuality, and class and economic inequality.
- The [Inclusive Washrooms Project](#), in which all buildings will have a gender-neutral washroom with signs about what is in the washroom (e.g., urinals, stalls), launched.
- The [Menstrual Equity Pilot](#), which provides free menstrual hygiene products in bathrooms across campus, launched.

- The [Sankofa Pathways to University Program](#) launched. The program provides Black Youth aged 17-25 the opportunity to participate in a free-of-cost university class titled “Taking B(l)ack History,” focused on Blackness, Black history, and Black futures. Over a seven-week period, students were able to participate in a full campus experience. Students were able to earn a transferable university half-credit upon successful completion of the course.
- The [progress report on the President's Anti-Racism Taskforce](#) was updated. 66 of the 88 recommendations are in progress, and 29 are completed. One example of a Recommendation that is complete and ongoing is Recommendation 69: Provide training for staff who support the administration of research, especially for projects with Black, Indigenous, and other racialized communities.
- Waterloo invited numerous internal and external experts to discuss EDI topics including Indigenous perspectives on disability and gender equity:
 - [Disability Decolonized](#) Keynote speaker Dr. Rheanna Robinson drew on her lived experience as a Métis woman with a disability, her work as a disability advocate, and her research as an Indigenous scholar at the University of Northern British Columbia.
 - The [Gender Equity Series](#) was launched. The series is intended to highlight some significant personal, interpersonal, and systemic barriers to gender equity across Waterloo's campus and to explain some of the harms of gender inequity when it arises.
- The [Office of Indigenous Relations Strategic Plan 2023-2028](#) was published. Some objectives include designating seats on the Senate and Board of Governors for Indigenous Peoples, increasing representation of Indigenous students, faculty, and staff, supporting Indigenous researchers and research, providing accessible and appropriate supports and services for Indigenous Peoples on campus, and strengthening relationships with local Indigenous communities.
- A centralized contact for reporting instances of hate was implemented.
- [Waterloo's Black and Indigenous Excellence Faculty Cluster Hire Initiative](#) was developed to help address the systemic underrepresentation of Indigenous and Black faculty. The Black Excellence Cluster Hire Initiative component has retained 15 professors and has now closed. The Indigenous Excellence Cluster Hire Initiative is ongoing. Activities to facilitate community building and support at Waterloo include onboarding activities, start-up funding, and a community tour and speaker series, among others. These cluster hires help to build a critical mass of underrepresented scholars, fostering a more equitable environment in which Chairholders can undertake their work.
- The [Waterloo Provost's Program for Black and Indigenous Postdoctoral Scholars](#) is ongoing and will contribute to the reduction of barriers for Black and Indigenous scholars in a supportive environment that fosters inclusivity, a sense of belonging, and a culture of engagement. The program will offer opportunities to develop mentorship skills and provide networking opportunities while supporting and contributing to a richer, more diverse pipeline of scholars within

the broader academic community. The program will also provide economic support to (i) ensure that Black and Indigenous individuals have access to resources that facilitate their involvement in research; and (ii) create a more robust program where scholars and society will benefit from equitable participation, knowledge, and perspective of Black and Indigenous individuals.

- University of Waterloo has launched a new [process to verify Indigenous membership/citizenship](#) to confirm eligibility for designated Indigenous staff, faculty and student opportunities at Waterloo. All self-identified Indigenous students are always welcome to take advantage of programs or services at The Waterloo Indigenous Student Centre (WISC). The verification process is intended to ensure that Indigenous specific programs, awards and positions that provide material benefits are made available to students with verifiable documentation or evidence of a relationship to an Indigenous community. False claims of Indigenous identity can inflict real harms on current and prospective Indigenous students and employees, and the University generally.

New Roles

- As outlined in the [Provost's Advisory Committee on Building a Resilient Waterloo](#), an Associate Provost, Campus Support and Accessibility role was announced, and a search is underway.
- Appointment of Dr. John Lewis in the newly created role of [Director, Indigenous Faculty Relations](#).

References

Casad, B. J., Franks, J. E., Garasky, C. E., Kittleman, M. M., Roesler, A. C., Hall, D. Y., & Petzel, Z. W. (2021). Gender inequality in academia: Problems and solutions for women faculty in STEM. *Journal of neuroscience research*, 99(1), 13-23.
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