



Assessing Equity, Diversity and Inclusion in Your Research Setting



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First, this document will help you to understand the close connection between excellence in research and equity, diversity and inclusion (EDI) in research settings. Next, this document will help you to assess and develop a picture of EDI practices at your institution as a whole and in your research setting in particular.) This document is intended mainly for academic policy makers, professors, staff in human resources and research departments, and recruitment committees. For example, for professors, this document will be a useful reference when they are writing funding applications, because at the start of any research project, it is important to plan how to make EDI an integral part of the recruitment process and of the project itself.

Here are the steps that we recommend you follow.

1. **Do a self-assessment:** Assess the way that your institution and your research setting currently manage EDI. This assessment will be divided into three parts: your institution's culture, your own practices, and your team members' situation. This exercise will give you an overall picture of the situation.
2. **Develop an EDI plan for your research setting:** Identify and define a sequence for the objectives, targets and indicators that you want to establish in your research setting so as to make progress toward sustainable changes that will increase EDI. An EDI plan, designed for a research grant, is a tool for improving governance, transparency and monitoring of equity and diversity in the research setting. Such a plan includes steps to achieve rapid progress in increasing the representation of members of the designated groups: women, members of visible minorities, Indigenous people, people with disabilities, and people whose mother tongue is neither English nor French.

Why have an EDI plan?

It has been demonstrated that equity, diversity and inclusion enhance scientific research by fostering creativity and innovation, thus increasing the quality of research and its use by and benefits to society.



Step 1: Self-assessment

For each of the following topics, this section asks questions that will help you to think about and make your own assessment of your institution and your research setting (department, research laboratory, research project, etc.), for yourself and for the team with whom you work there. We suggest that to facilitate this exercise and get a better overview of your situation, you use various colours to highlight the things that are being done well and the things that need improvement.

Your institution's culture

- a) What are the values that represent your institution (university, institute, school)? (See reference 9.)

- b) Are equity, diversity and inclusion (EDI) values that define your institution? If so, has your institution made its staff and/or students aware of its objectives with regard to EDI? If so, can you define them? (See references 7, 10 and 11.)

- c) Do you think that your institution needs to change its culture with regard to EDI? Why?

- d) What effects are your institution's planned EDI measures expected to have on teaching, research and/or work?

- e) Do you think that members of the designated groups are underrepresented at your institution?

- f) Does your institution offer EDI training? (See reference 14.)

g) Has your institution designated a resource person, a committee or an organizational unit to answer people's questions about EDI? (See references 10 and 12.)

h) Does your institution reward EDI initiatives? (See reference 13.)

i) Does your institution have effective policies regarding discrimination and harassment? If so, can you name them? (See reference 6.)

Your own practices

a) Are you aware of and sensitive to EDI issues?

b) Have you taken any training about EDI and/or about unconscious biases (for example, the Canada Research Chairs unconscious bias training module, or the training on the potential benefits and challenges of diversity in higher education and research provided by Professor Eve Langelier)? How would you rate your knowledge of EDI issues: poor, fair, good, or excellent)?

c) How do you define equity, diversity and inclusion? (See reference 8.)

d) What are the potential benefits of EDI in research settings?

e) In your opinion, what is the relationship between EDI and research excellence?

f) How do you define unconscious bias?

g) What steps are you taking currently or have you taken in the past to provide your team members with training about equity, diversity, inclusion and unconscious bias and to sensitize them to these issues?

h) Is there a person on your team who can serve as a resource on EDI issues?

i) What steps are you currently taking during recruitment, selection and staffing of your teams? (See reference 2.)

j) What steps are you taking when writing job offers or project proposals to ensure the recruitment of members of designated groups to work on your team? (See reference 2.)

k) To reach all potential candidates for a position, do you post only those qualifications and skills that are essential for it? (If you don't, someone who is qualified might exclude themselves and not submit an application.)

l) Do you use inclusive, impartial, non-gendered language when writing job offers and project proposals (for example, by changing pronouns to the feminine form)? (See references 1, 3 and 5.)

m) Do you have a note inviting members of designated groups to submit applications?

n) Do you have your job offers and project proposals reviewed by an EDI expert and/or by members of designated groups?

o) Do you have an EDI self-identification questionnaire? If so, are the data from this questionnaire stored so as to protect confidentiality? (See reference 4.)

p) What steps do you take to reach members of designated groups when posting job opportunities? Do you post them in both official languages? Do you post them for at least 30 days?

q) During your last few recruitment exercises, what percentage of high-quality applications did you receive from members of designated groups? In your opinion, was this percentage high enough? If not, had you posted at the right locations? Do your web sites, platforms and networks reach all of the designated groups?

r) How many of the candidates whom you selected for interviews were from designated groups and how many were not?

s) Do you define and weight the selection criteria that you use to evaluate candidates in such a way as to ensure an impartial, consistent, transparent selection process?

t) At interviews, do you try to follow the same procedure for all candidates (for example, ask all of them the same questions in the same order)?

u) How do you perceive members of your work team who step away from their work to meet family obligations?

v) Are skills acquired from experience working in other countries (for example, by candidates who are immigrants to Canada) valued in your hiring process?

w) Among the candidates who are retained after interviews, what percentage are members of designated groups?

x) Have you stated that if candidates are equally qualified, you will give priority to members of designated groups? Or that if members of designated groups are currently underrepresented on your team, priority will be given to members of designated groups who achieve the success threshold?

y) Are your hiring processes fair? If yes, why? If not, why not?

z) What is the composition of your work team (members of various designated groups; mix of early-, mid- and late-career researchers and postdoctoral fellows)?

Your team members' situation

a) Are the members of your team aware of and sensitive to EDI issues?

b) Do you think that the members of your team can define equity, diversity and inclusion?

c) Do you think that the members of your team can define unconscious bias?

d) Have they taken any training about EDI and/or about unconscious bias (for example, the Canada Research Chairs unconscious bias training module, or the training on the potential benefits and challenges of diversity in higher education and research provided by Professor Eve Langelier)? If not, do you intend to provide them with such training?

e) Who are the researchers who will sit on your selection committees?

f) Do they include members of designated groups?

g) How do you orient members of designated groups who are joining your department, team or research laboratory?

h) What steps do you take to enable them to adapt and fit in?

i) Do you conduct any networking activities for them? If so, please describe.

j) Do you give them any mentoring?

k) Do you follow up with them while they are first settling into their jobs? If so, how do your meetings go?

l) Does everyone on your team feel free to participate and to communicate their ideas?

m) To ensure the well-being of your team members, do you ask them about their needs and about any obstacles that they may be experiencing?

n) Are there any people on your team who are members of designated groups and who are experiencing exclusion, self-censorship or pressure to conform?

o) Are roles and work distributed fairly between the sexes? If so, how do you accomplish this? (See references 1, 3 and 5.)

p) Do you make sure that resource-allocation decisions are made in a way that is free of any sexual stereotypes or biases? (See references 1, 3 and 5.)

q) Are any steps taken to facilitate inclusion of people with disabilities (for example, physical adaptations of the workplace)? If so, describe these steps.

If applicable:

a) Do you take EDI into account in your research?

b) Do you take issues of diversity into account in your research? If individuals from various designated groups are excluded, could that have an impact on your research findings?

c) In your research, do you consider people from diverse groups—in other words, women, members of visible minorities, Indigenous people, people with disabilities, and people whose mother tongue is neither English nor French?

d) How do you solicit, recruit and select subjects for your studies?

e) How do you take these variables into account in your data-collection, analysis and interpretation and/or in the dissemination of your results?

f) In your data-collection process, are you fair to all the candidates?

g) Do you consider sex (as a biological variable) and/or gender (as a socio-cultural factor) in your research projects (for example, in your research plan and work methods)? (See references 1, 3 and 5.)

h) If the group “women” or the group “men” (females/males) (from an anatomical standpoint) were excluded, might that have an effect on your research findings? And why? (See references 1, 3 and 5.)

i) If individuals belonging to different genders were excluded, might that have an effect on your research findings? (See references 1, 3 and 5.)

j) When planning conferences and symposiums, do you consider including members of designated groups among the presenters?



Step 2: Equity, Diversity and Inclusion Plan for Your Team

On the basis of the answers that you gave in your self-assessment, **identify the objective(s), target(s) and indicator(s) that you want to establish for your work team** so that it adheres to the principles of equity, diversity and inclusion more closely.

Objective	
Target(s)	
Indicator(s)	

Objective	
Target(s)	
Indicator(s)	

Objective	
Target(s)	
Indicator(s)	

Objective	
Target(s)	
Indicator(s)	

To help your EDI plan succeed, please identify the available resources that may be useful in developing and carrying out a strategy for implementing this plan.



Here are some references that may help you.

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2. Chaires de recherche du Canada (CRC). (2019). *Guide des pratiques exemplaires de recrutement, d'embauche et de maintien en poste visant à favoriser l'équité, la diversité et l'inclusion*. Gouvernement du Canada. Repéré à: http://www.chairs-chaires.gc.ca/program-programme/equity-equite/best_practices-pratiques_examplaires-fra.aspx
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4. Gouvernement du Canada. (2019). *Collecte de renseignements autodéclarés à l'appui de l'équité, de la diversité et de l'inclusion*. Repéré à: http://www.science.gc.ca/eic/site/063.nsf/fra/h_97615.html
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11. Université de Sherbrooke (UdeS). (s.d.). *Orientations*. Repéré à: <https://www.usherbrooke.ca/planification-strategique/orientations/>

12. Université de Sherbrooke (UdeS). (s.d.). *Préoccupations en matière d'équité, de diversité et d'inclusion*. Repéré à: <https://www.usherbrooke.ca/recherche/fr/organisation/equite/equite/>
13. Université de Sherbrooke (UdeS). (s.d.). *Prix inspiration 2020*. Repéré à: <https://www.usherbrooke.ca/personnel/prix-inspiration/categories/>
14. Université de Sherbrooke (UdeS). (s.d.). *Stratégie de sensibilisation et formation*. Repéré à: <https://www.usherbrooke.ca/recherche/fr/organisation/equite/strategie-de-sensibilisation-et-formation/>