Title: Introducing Perimeter's Strategic EDI Plan

Speakers: Robert Myers, Ana Sofia Barrows

Series: Colloquium

Date: November 09, 2022 - 2:00 PM

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Abstract: Over the last decade, there have been many Perimeter efforts in the realm of EDI, and they have unquestionably enhanced the Institute's culture. Paradoxically, some of these efforts have illuminated areas where we can do more, and there are still others to be addressed.

In Perimeter's short life, we've built a unique institution, with a culture characterized by intellectual fearlessness and excellence. Yet we can do even better. Our culture is connected to our research. We're here to make breakthroughs in our understanding of our universe - and breakthroughs are made by thinking in new ways. We can't afford to leave any great thinkers, or any great ideas, behind.

In 2020, we embarked on a project to develop a coherent, concrete strategic plan to guide Perimeter's efforts in EDI, in partnership with experts at Shift Health and the Laurier Centre for Women in Science. All members of the Perimeter community have been consulted to ensure that the final strategy is reflective of our whole community.

Our actions to date are a step in an intentional and comprehensive effort to make Perimeter an institute where everyone can thrive and find a sense of belonging.

Zoom link: https://pitp.zoom.us/j/93399374837?pwd=QlBTSnluRk84L2x0eE0zYXlGQ0JFZz09

Strategic EDI Plan

November 2022

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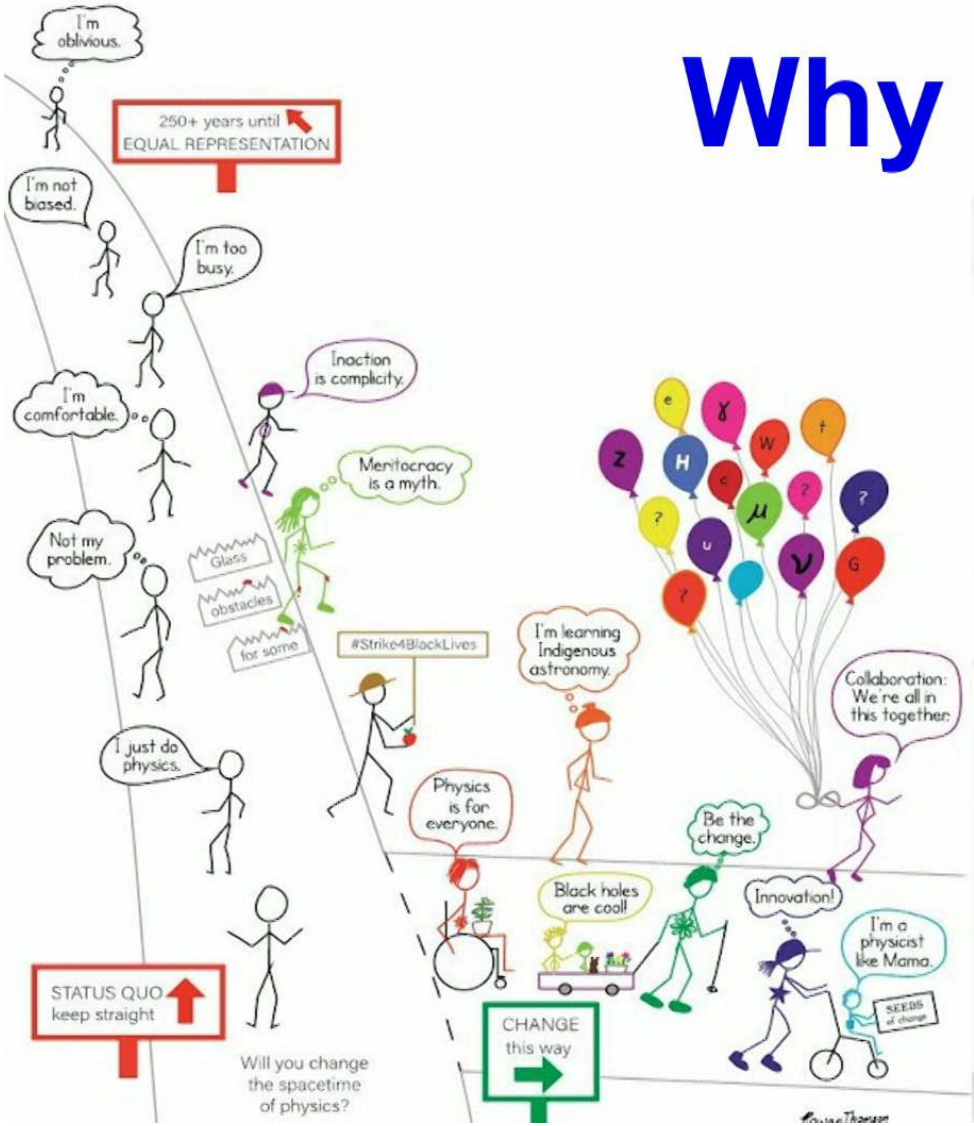
In the spirit of understanding and learning from what has come before, Perimeter respectfully acknowledges that we are located on the traditional territory of the Attawandaron, Anishnaabeg, and Haudenosaunee peoples. Perimeter is situated on the Haldimand Tract, land promised to Six Nations, which includes six miles on each side of the Grand River.

As settlers, we thank all the generations of people who have taken care of this land for thousands of years. We are connected to our collective commitment to make the promise and the challenge of Truth and Reconciliation real in our communities.

IDEA → EDI?

	Definitions
Inclusion	Creating and maintaining environments in which any individual or group can be and feel welcomed, respected, represented, supported, valued and can fully participate.
Diversity	Examining and questioning the makeup of an organization to ensure that the full range of lived experiences and perspectives is represented throughout.
Equity	Ensuring the fair treatment of all members of a community.
Accessibility	Ensuring that everyone along the continuum of human ability and experience can fully participate.

Why EDI?

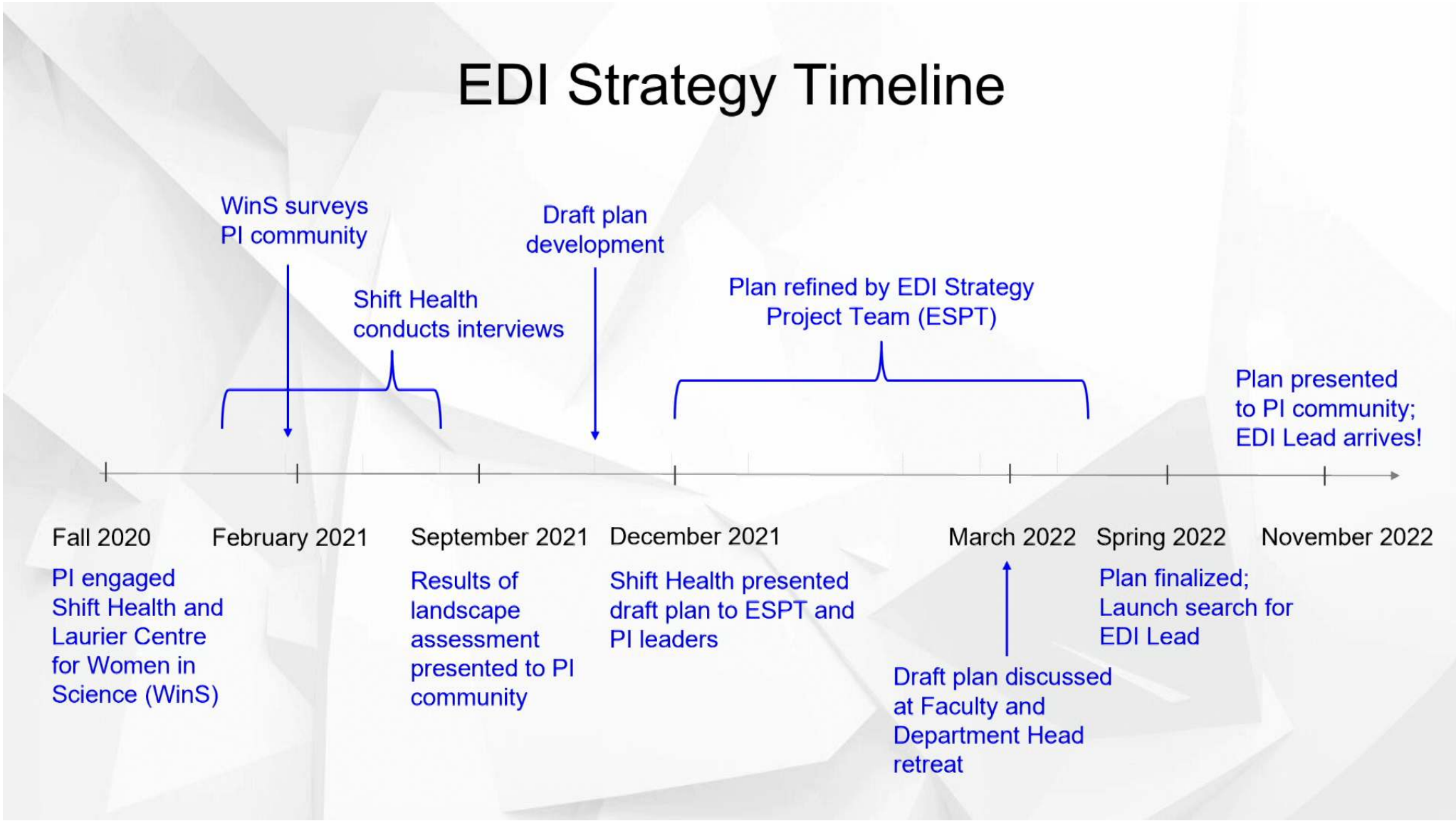


Rowan Thomson
Professor of Physics, CRC Chair, and Assistant Dean (of Equity, Diversity and Inclusion) at Carleton University & Perimeter Alumna

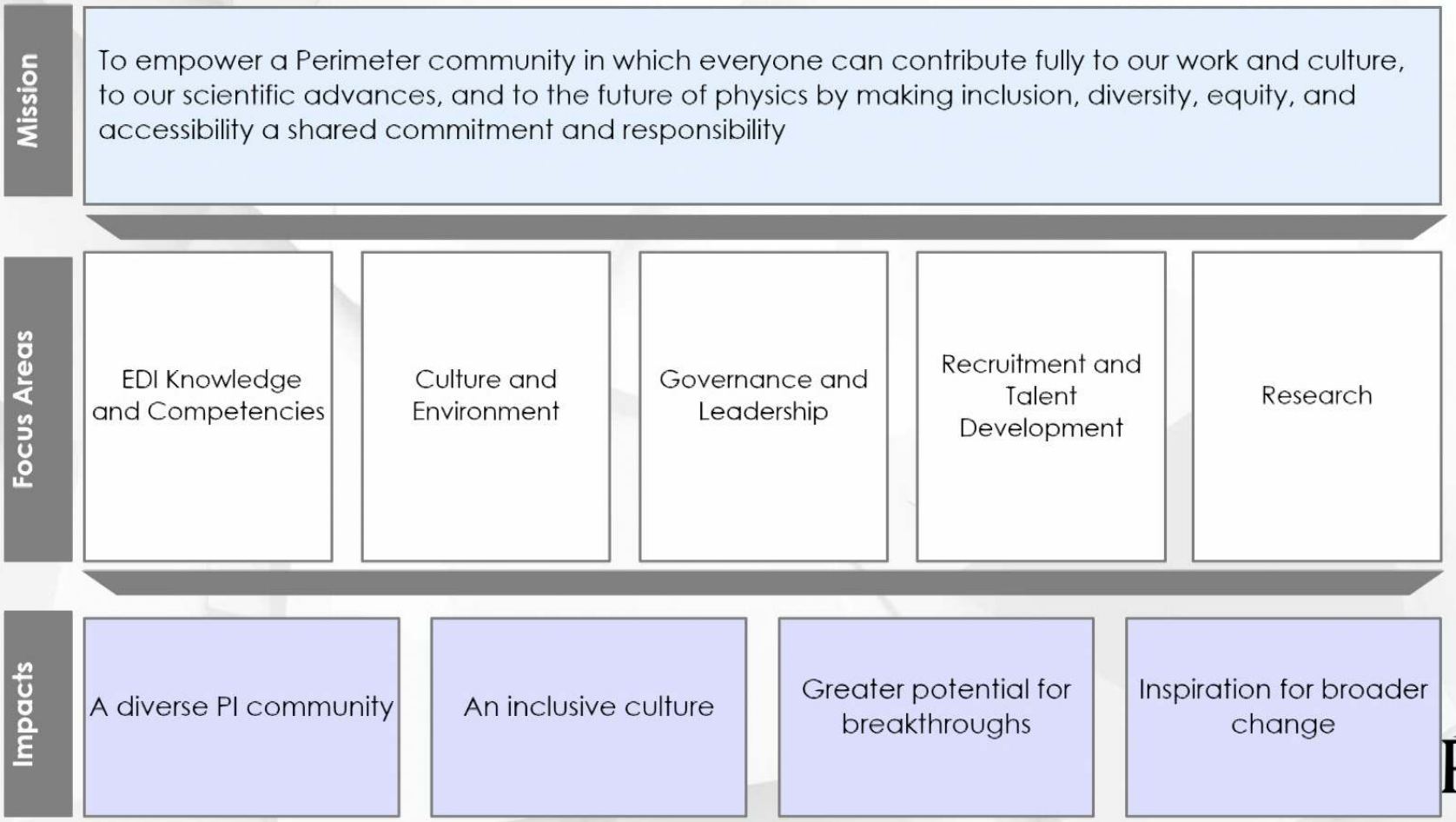
Physics Today article:
https://physicstoday.scitation.org/doi/10.1063/PT.3.4921

Goal: make Perimeter a place where everyone can thrive and find a sense of belonging.

EDI Strategy Timeline



Strategy EDI Plan at a Glance



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Strategic EDI Plan

Focus Areas:

1. **EDI knowledge and competencies** – facilitate continual learning to develop EDI knowledge and skill sets among all members of the PI community
2. **Culture and environment** – foster shared responsibility for EDI among researchers, students, and staff at PI to build a culture where everyone can contribute fully
3. **Governance and leadership** – embed EDI within PI's leadership culture, organizational policies, practices, and decision-making processes
4. **Recruitment and talent development** – attract, support, and retain a diverse pool of students, staff, and researchers
5. **Research** – maximize the potential for scientific breakthroughs based on a foundation of diversity and inclusion

→ Each focus area outlines objectives, key activities, and measures by which we can gauge progress toward the plan's goals.

→ A high-level implementation roadmap accompanies this plan, giving a concrete framework, timelines, and resource allocations for key activities

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Focus Area 1: EDI Knowledge and Competencies

1.1 Context

Building EDI knowledge and competencies across PI's community will create a foundation for shared responsibility and action.

While there is a growing appreciation of the importance of EDI within research-intensive organizations,[8] knowledge, skills, and interest in EDI vary from person to person. Currently, much of the EDI work done at PI is led by dozens of members of the Inclusive PI Platform. However, Platform members are all volunteers with full research, study, and/or administrative workloads. To support ongoing work in EDI, we will add dedicated EDI personnel and resources.

Consultations with PI residents indicated broad interest in strengthening EDI skills and competencies. Strengthening EDI knowledge and competencies will also enable the successful implementation of this strategy. In line with this, a goal for this focus area is to increase understanding of EDI concepts, expectations, and best practices throughout PI. In some instances, this will mean broad-based workshops for the whole community. In others, it will involve specialized training and resources that are appropriate for certain roles and functions (e.g., hiring, student supervision, career management).

PI's culture, and the field of EDI itself, are dynamic. Ongoing learning, assessment, and reflection will help us integrate EDI thoughtfully.

[8] Making Excellence Inclusive; McMaster: Towards Inclusive Excellence; UBC: Inclusive Excellence; UofT: Inspiring Inclusive Excellence

Focus Area 1: EDI Knowledge and Competencies

1.2 Objectives

- Provide appropriate resources for EDI activities and programs
- Build understanding of EDI principles and practices, equipping the PI community to embed EDI effectively in all research, training, and educational outreach activities
- Communicate EDI initiatives and policies effectively
- Collect and analyze data on PI's EDI climate and demographics, and track activities and progress, as well as lessons learned
- Equip the entire Perimeter community, and especially our trainees, with EDI skills that they will take with them as they progress in their careers

Focus Area 1: EDI Knowledge and Competencies

1.3 Key Activities

- Recruit an EDI Lead to support implementation of this strategy, act as the focal point for EDI-related activities, advise leadership, and monitor PI's progress in EDI
- Provide EDI-related training on priority topics (e.g., recruitment, unconscious bias, respectful behaviour) to build competencies, communicate codes of conduct and relevant policies, and address any urgent EDI challenges that emerge
- Ensure that all personnel involved in recruitment and hiring across the Institute (from students to administrative staff to faculty) are up to date with best practices for hiring (see Focus Area 4)
- Design and implement methods to collect and analyze data on PI's EDI climate and demographics
- Conduct a confidential survey of the full PI community every two years to determine issues and barriers relevant to EDI, as well as to measure progress on the strategic plan; the first such survey is projected for 2024
- Develop and implement a communication plan to regularly update the PI community on EDI initiatives, trainings, policies, strategies, and resources
- Ensure that all PI communications are proactive and respectful in representing diversity and fostering an inclusive climate
- Regularly educate the PI community on policies for confidentially reporting harassment or other issues and on resources available to support survivors
- Provide encouragement and resources for researchers to attend EDI-related conferences and workshops (e.g., the National Society of Black Physicists, Indigenous scientific associations); aim

Focus Area 1: EDI Knowledge and Competencies

1.4 Measures of Progress

- Hiring of EDI Lead, who will guide implementation of the elements outlined in this plan and the implementation roadmap
- Comprehensive, two-yearly climate and demographic surveys of PI community (the first is projected for 2024), with results communicated to the PI community and the Board
- Increase in self-reported level of EDI knowledge and skills among PI community members (as measured by EDI surveys)
- Improvement in self-reported sense of belonging among residents from underrepresented groups (as measured by EDI surveys)
- Growth in the EDI-related resources available to PI community members and in the number of individuals accessing these resources
- Inclusion of training, workshops, events, and discussions on EDI-related topics as a regular part of faculty, postdoc, student, and admin life at PI; collection of quantitative and qualitative data on these activities (e.g., numbers of participants, satisfaction with presentations)

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https://perimeterinstitute.ca/equity-diversity-and-inclusion-edi

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Newly Appointed Senior Manager, EDI

Ana Sofia Barrows

- Canadian Certified Inclusion Professional (CCIP) designation, B.Sc. in Medical Physics and currently completing a M.Ed. in Social Justice Education
- 7 years of EDI leadership experience developed through positions held at Toronto Metropolitan University, Rotman School of Business, and Intact Financial, and as an independent consultant.
- Also a part time faculty lecturer and experienced public speaker on EDI topics
- Started November 1, 2022

→ support implementation of EDI strategy, act as focal point for EDI-related activities, advise leadership, and monitor Perimeter's progress in EDI

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Priorities

- **Demographics** - Collect and analyze data on PI's EDI climate and demographic
- **Training** – Develop an EDI training plan on priority topics and source training
- **Recruitment** – Review and revise our recruitment and talent development polices and practices
- **Inclusive PI Platform** – Support the efforts of the working groups and make recommendations to ensure the platform is operating effectively

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Why Get Involved?

"We're here to make breakthroughs in our understanding of our universe – and breakthroughs are made by thinking in new ways. We can't afford to leave any great thinkers, or any great ideas, behind."

Robert Myers, PI Strategic EDI Plan

"In order to achieve world-class research, we must address systemic barriers that limit the full participation of all talented individuals."

Tri-Agency EDI Action Plan for 2018-2025

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Getting Involved

- Join a PI Inclusive Platform Working Group
- Commit to developing EDI skills and participate in training opportunities
- Incorporate EDI principles in all relevant Institute policies, events, programs and initiatives
- Take part in data collection and participate in ongoing surveys

Inclusive PI Platform

- Founded in 2018 as a grassroots volunteer-led effort
- Mission is to identify ways in which life at PI can be more equitable, more inclusive, and all-round better for all.
- The Platform is organized as a network of working groups who meet to learn, discuss, and propose solutions.
- Changing culture starts with honest discussions, having all voices heard, and harnessing the energy and wisdom of multiple viewpoints.
- Platform activities are documented and available to all PI residents at: Dropbox (PI)\Inclusive PI Platform.

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Current Platform Working Groups

- Accessibility
- Anti-racism
- Climate Change
- LGBTQ2A+
- Mental Health
- Parental Policies
- Respectful Environment
- Women in Physics

A million thanks!

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- Survey respondents, interview participants, workshop participants,
  Laurent Friedel, Christina Bouda, Platform members, . . .

A million thanks!

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