Building a Race-Conscious Institution

A Guide for University Leaders Enacting Anti-Racist Organizational Change
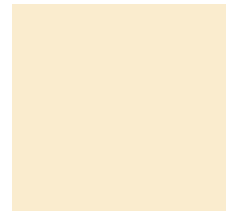
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Table of contents

Appendices

Table of Figures

Preamble

Background and Context
Within the last decade, Universities Canada (UC) has reaffirmed its commitment to advancing Indigenous and equity, diversity, and inclusion (EDI) priorities across the university sector.

Timeline

2015   Universities Canada (UC) released a statement committing to thirteen Indigenous Education Principles and reinforcing the 2015 Truth and Reconciliation Commission (TRC) of Canada Calls to Action.

2017   UC released a statement on EDI, committing to seven Inclusive Excellence Principles and simultaneously launched a five-year EDI Action Plan.

2019   UC surveyed Canadian universities on their EDI progress and published the results in the EDI at Canadian Universities Report on the 2019 National Survey.

The federal government launched the Canada's Antiracism Strategy: Building a Foundation for Change, recognizing the need for a national strategy to address pervasive systemic racism.

2020   The death of George Floyd triggered global movements united in their calls for urgent actions to address structural racism across social institutions, including within the university sector. These events accelerated the work being undertaken.

2021   The United Nations Report on Racism was released to establish national and international imperatives to address antiracism.

The Canadian government passed Bill C-15 – United National Declaration of the Rights of Indigenous Peoples Act.

Post-secondary instutions across Canada signed on to the Scarborough Charter, a set of recommendations for post-secondary institutions to more meaningfully address anti-Black racism and support Black inclusion and excellence.

Purpose and Organization

The purpose of this Guide is three-fold:
- To raise awareness of the EDI change imperative specific to antiracism in the university context;
- To share foundational concepts needed to better understand and address the challenge; and
- To provide tools to inspire and promote deeper learning and more transformative action.

The Guide is organized in three sections:
- **Setting the Context**, which defines important terms, situates racism and antiracism efforts in historical context, references the legal frameworks and standards guiding campus human rights and equity offices and articulates the case for EDI in higher education.
- **Developing Race-Conscious Organizations**, which describes the hallmarks of a race-conscious institution and the ideological barriers to advancing EDI and antiracism.
- **Enacting Antiracist Organizational Change**, which provides a roadmap and resources to support strategic action within postsecondary institutions.

Photo: University of Ottawa

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Setting the Context

1. Setting the Context

1.1 Definition of Terms

i. Equity, Diversity, and Inclusion Defined

Diversity is a composite of several intersecting dimensions of difference across personal attributes, sociocultural group membership, and organizational status and affiliations[1]. In the context of EDI in higher education, institutions are interested in the *compositional diversity* [2] or the "numeric and proportional representation"[3] of people in relation to the internal dimensions.

Inclusion can be described as a sense of belonging to the in-group – arguably the group with the most access to social and political power and with the strongest voice[4]. A sense of inclusion relates to and is a consequence of *interactional diversity* – the extent to which community members effectively engage with different "information and ideas through the interactions that they have with diverse people".[5,6]

Equity may be considered both an approach and a process that introduces proactive interventions to mitigate and remove barriers to equality of opportunity in education and employment and meaningful inclusion in the life and work of the institution.

Figure 1 describes the distinct but interrelated concepts of equity, diversity, and inclusion.

Figure 1. Equity, Diversity, and Inclusion Defined

EQUITY (APPROACH/PROCESS)

An approach that acknowledges the existence of social inequities and a process that introduces proactive measures to remove barriers to equality of opportunity

DIVERSITY (STATE/CONDITION)

The state or condition of a community in relation to its broad "mix" of individuals representing different social identity groups

INCLUSION (FEELING/EXPERIENCE)

The feeling of dignity, belonging, fairness, and engagement experienced by members of different social groups, as a result of active and skillful interaction across differences

ii. Racism Defined and in Historical Context

Racism is defined as

> "a system in which one group of people exercises power over another on the basis of skin colour; an implicit or explicit set of beliefs, erroneous assumptions, and actions based on an ideology of the inherent superiority of one racial group over another, and evident in organizational or institutional structures and programs as well as in individual thought or behavioiur patterns".[7]

Personally-mediated racial discrimination must be distinguished from systemic racial discrimination.

> **Personally-mediated racial discrimination** – sometimes referred to as individual racism – occurs when behaviour of individual members of one group are rooted in personal biases and prejudices and have a differential and adverse effect on individual members of racially minoritized groups.

> **Institutional racism**, a form of systemic racial discrimination, occurs when institutional policies with imbedded biases and prejudices dictate practices that have differential and adverse effects on members of racially minoritized groups.

> **Structural Racism**, or racial oppression, refers to the interlocking nature of institutional systems of racial discrimination at the societal level, where the normative dominant culture perpetuates differential and adverse effects on racially minoritized populations.

There are many forms of racism, including **anti-Indigenous racism**, **anti-Black racism**, and **anti-Asian racism**. As well, **islamophobia** and **antisemitism** are forms of prejudice and discrimination that are based intersecting grounds of race, creed, ethnic origin, place of origin, and ancestry[8].

Canada's foundation was informed by racialist regimes, which have been described as follows:

> Racialism is an ideology with three main pillars: first, that the human species is composed of separate entities called races; second, that race determines the abilities of human groups (races) and that such abilities are inherited along with physical features such as skin colour; and third, that it is legitimate for one 'race' to rule over another because the dominant race always has superior abilities. Each of these pillars has since been discredited scientifically, but together, at the time, they formed the ideological foundations of each state, and they explain how the supplanting societies dispossessed the original owners of their territories. As a consequence, racialist ideas have been embedded in the institutions and practices of government and continue to influence politics in significant ways. [9]

Three racialist foundational race regimes operated in Canada, and underpin historic and present-day systemic anti-Indigenous, anti-Black, and anti-Asian racism: internal **colonialism**; pre-confederation **slavery** turned to post-confederacy **indentured servitude** and **segregation**; and an immigration regime governed by **orientalism** and a "Whites-only nationalism"[10].

Understanding the unique experiences of Black, Indigenous, and racialized communities is important to effectively (re)address historical and contemporary inequities.

iii. Anti-Racism Defined and Contemporary Movements

Critical race/antiracist approaches are concerned with achieving equity by examining social relations of power and transforming institutional structures that (re)produce systemic discrimination.

Antiracism is defined as the "measures and mechanisms designed by the state, institutions, organizations, groups and individuals to counteract racism"[11] and "an active and consistent process of change to eliminate individual, institutional and systemic racism."[12]

"Grassroots" activism and social justice movements have made invaluable contributions to the advancement of EDI and anti-racism advocacy efforts within institutions of higher education.

> The Land Back Movement—which builds on the Idle No More Movement— **is an Indigenous-led movement** that centres Indigenous rights and responsibilities within the land governance decision-making process in Canada to achieve both cultural reconciliation and restoration of healthy ecosystems reliant on the land.

> The Black Lives Matter Movement (BLM) builds on civil rights and Black liberation movements to name and confront police brutality, racial profiling, racial discrimination in the justice system, and broader economic and social inequity experienced by persons of Black/African descent and diaspora.

> Awareness of 2SLGBTQ+ rights and disability justice movements is needed to understand inequities facing sexual orientation and gender identity minoritized groups and peoples with disabilities, as well as how these issues may intersect to create compounding barriers for 'doubly' marginalized groups.

Senior administrators and institutional governing bodies must enhance their capacity to interact with social justice advocates and grassroots community groups across an "ethical space of engagement"[13] – described by Roger Poole as the space that becomes available at the interface between two cultures (Figure 2). A deeper understanding of differing values and intentions and dialogue in this space creates the possibility for productive relations and positive change.

Figure 2. Ethical Space of Engagement [14]

A. Working in the space between two knowledge sytems

B. A space that no one owns, where engagement involves openness and mutual learning

Ethical space
(Roger Poole, 1972)
A.
B.
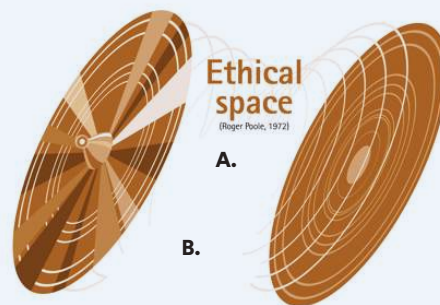
1.2 Legislative Framework for EDI and Antiracist Practice

EDI principles and anti-racist practices in Canadian universities are premised on provisions for equality and protections against discrimination and harassment set out in various federal, provincial, and territorial laws.

Section 15 of the Canadian Charter of Rights and Freedoms describes the provision for the right to equality:

> "Every individual is equal before and under the law and has the right to the equal protection and equal benefit of the law without discrimination and, in particular, without discrimination based on race, national or ethnic origin, colour, religion, sex, age or mental or physical disability."[15]

The purpose of the federal Employment Equity Act is described below:

> "to achieve equality in the workplace so that no person shall be denied employment opportunities or benefits for reasons unrelated to ability and, in the fulfilment of that goal, to correct the conditions of disadvantage in employment experience by women, Aboriginal persons, persons with disabilities and members of visible minorities[1] by giving effect to the principle that employment equity means more than treating persons in the same way but also requires special measures and the accommodation of differences."[16]

The purpose of the Canadian Human Rights Act is

> "to extend the laws in Canada to give effect...to the principle that all individuals should have an opportunity equal with other individuals to make for themselves the lives that they are able and wish to have and to have their needs accommodated, consistent with their duties and obligations as members of society, without being hindered in or prevented from doing so by discriminatory practices based on race, national or ethnic origin, colour, religion, age, sex, sexual orientation, gender identify or expression, marital status, family status, genetic characteristics, disability or conviction for an offence for which a pardon bas been granted or in respect of which a record suspension has been ordered."[17]

Provinces and territories have unique Human Rights Codes (2018).[18]

Within universities, **Human Rights and Equity Offices** play essential roles related to legal and regulatory human rights requirements, as well as campus wide EDI and antiracism education. These Offices, and the institutions in which they operate, are committed to upholding the following:
- providing specialized advising, complaint handling and education;
- promoting natural justice, procedural fairness, confidentiality, and timeliness;
- operating with a level of autonomy and independence within institutions; and
- ensuring adequate resourcing to perform their responsibilities.

In its Report on the 2019 national survey, Universities Canada affirmed the need for "administrative structures and staffing to develop, implement and monitor equity, diversity and inclusion (EDI) strategies, action plans, policies and practices."[19]

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[1] The term racialized is a more contemporary term used in Canada and preferred over "visible minority", which is defined by the government of Canada in the Employment Equity Act as persons, other than Indigenous peoples, who do not identify as Caucasian, European, and/or White in race, ethnicity, origin, and/or colour, regardless of birthplace or citizenship.

1.3 The Case for EDI

The case for diversity is, in fact, a case for *inclusive excellence* – a concept that affirms the essential role of a diversity of peoples and perspectives in harnessing academic creativity, and innovation, and excellence.[20,21,22]

Diversity Benefits. Increasing the diversity of students, scholars, and staff in higher education benefits individual, institutional, and societal goals by:

- improving individual experiences and educational outcomes;
- enhancing institutional performance and academic excellence outputs; and
- increasing social sustainability and other social impacts.[23]

Diversity Barriers. The following historically underrepresented groups in higher education continue to face barriers to access and equal opportunity in education and employment today, due to personally mediated biases and systemic inequities: Indigenous (First Nations, Métis, and Inuit) peoples, persons belonging to racialized communities – particularly persons of Black/African descent, persons with disabilities, and women – particularly in STEM fields.

Diversity Best Practices. Comprehensive, system-wide and iterative strategic interventions targeting personal, structural, and cultural change are essential to achieving transformational results.

Section 1. Take-Aways

The following is a checklist of actionable take-aways from the concepts discussed in Section 1.

☐ Understand the differences between equity, diversity, and inclusion (EDI).

☐ Understand the differences between individual and systemic racism.

☐ Understand the forms of racism and their historical roots and contemporary legacies.

☐ Create spaces to ethically engage with Indigenous, Black, and racialized communities.

☐ Adequately resource and support human rights and equity offices.

☐ Be able to strongly articulate the case for EDI and inclusive excellence.

Below are some suggested tools to help deepen conceptual learning and mobilize actions.

Recommended Reading:
· Henry, F., James, C., Li, P. S., Kobayashi, A. L., Smith, M., Ramos, H., & Enakshi, D. (2017). *The equity myth: Racialization and indigeneity at Canadian universities*. Vancouver, BC: UBC Press.
· Williams, D. A., Berger, J. B., & McClendon, S. A. (2005). *Toward a model of inclusive excellence and change in postsecondary institutions*. Washington, D.C.: Association of American Colleges and Universities. https://aacu.org/sites/default/files/files/mei/williams_et_al.pdf

Resources:
· Dimensions of Diversity[24]
· Social Identity Wheel[25]
· Canadian Race Relations Foundation Glossary[26]
· Canadian Centre for Diversity and Inclusion Resources[27]
· Canadian Human Rights Commission Glossary[28]
· Diversity Gap Canada[29]

Developing Race-conscious Organizations

2. Developing Race-conscious Organizations

2.1 Hallmarks of a Race-Conscious Institution

i. Organizational EDI Change Paradigms

A **race-conscious institution** operates within a dominant worldview that acknowledges the existence of personally mediated race-related biases and systemic inequities imbedded in its structures (policies and written rules) and culture (everyday taken-for-granted practices and unwritten rules). In these organizations the norm is to proactively examine every aspect of organizational functioning to uncover and mitigate, if not remove, race-related biases and barriers.

Figure 3 depicts the hallmarks of three organizational paradigms in higher education: the monocultural organization that either ignores diversity or focuses only superficially on diversity; the multicultural or intercultural organization that focuses on inclusion; and the anti-racist organization that focuses on equity.

Figure 3. Organizational EDI Change Paradigms[30]

Monocultural **Complacent or Compliant**	**Multicultural/Intercultural** **"Colour-Evasive"**	**Anti-Racist** **Conscious**
SUPERFICIAL FOCUS ON DIVERSITY	**FOCUS ON INCLUSION**	**FOCUS ON EQUITY**
1. homogeneous/little diversity 2. no demographic data collection 3. "sensitivity", "tolerance","diversity" 4. ethnocentric 5. diversity symbolic ("virtue signaling") 6. mainly events to celebrate diversity 7. leaders have little or no EDI literacy, agency and allyship	1. Some diversity, apparent gaps and stratification in representation 2. Rudimentary data collection and reporting 3. "respect", "acceptance", "inclusion" 4. some ethno-relativity 5. EDI is an "add-on" - additive 6. primarily individual interventions (personal/interpersonal) 7. leaders have some EDI literacy or fluency, but little or no agency and allyship	1. Diversity at all levels and broad representation 2. robust dissaggregated and intersectional data collection and reporting 3. "safety", "humility", "anti-oppression" 4. ethno-relative and transformative 5. EDI is integrated - integrative 6. individual and systemic interventions (structure/culture) 7. leaders have EDI fluency or proficiency and exercise agency and allyship

ii. Race Consciousness v. Colour-Evasion

Race Consciousness is an ideology that counteracts the concept of 'colour-blindness' or colour evasion – a belief system that one does not or should not 'see' racial differences along with claims that one can be objective and unaffected by racial bias.

Colour evasion is one of ten dominant ideologies and pervasive narratives that are prevalent in Canadian universities.[31] These ten discourses represent "myths, explanations, codes of meaning, and rationalizations that have the effect of establishing, sustaining, and reinforcing"[32] dominant narratives that passively or actively undermine efforts to counteract racism (Figure 4).

Figure 4. Discursive Barriers to Antiracist Organizational Change[33]
Discursive Barrier, Description, and Examples in Speech

Denial: A wilful or negligent lack of recognition of the existence of social inequities. Also manifests as a passive, minimizing, rationalizing, and/or defensive standpoint. (E.g., "I don't see an equity problem."; "In [this discipline] the curriculum, is neutral."; "Equity is bound to be an issue anywhere; it's less of an issue in Canada.")

De-Contextualization: A belief that "incidents of discrimination and bias are isolated and aberrant instances." Also manifests as a focus on individual and interactional aspects of bias rather than systemic (structural and cultural) nature of inequity. (E.g., "That's just that individual's poor behaviour."; "We value mutual respect – that's most important.")

Colour Evasion: A belief that one does/should not "see" sociocultural difference, which overlooks how social inequities matter. (E.g., "I don't see colour"; "Deep down human are all alike."; "I tend to focus on similarities."; "I'm not sure it matters if an administrator is male or female or a particular ethnic background.")

Equal Opportunity: A belief that pure meritocracies exist and that all individuals begin with the same opportunities to determine their own fate. Also manifests as claims of objectivity. (E.g., "We should treat everyone the same."; "I think the lack of diversity has more to do with qualified individuals available for positions within academia.")

Binary Polarization: A dualistic worldview in which people and practices are seen as a series of opposites in competition with each other. Also manifests as negative or "positive" stereotyping and/or "othering" language. (E.g., "Minorities are taking our jobs."; "We've provided them with a resource centre to build community.")

Balkanization: A belief that division and disharmony will be the outcome of attention to human differences. Also manifests as the framing of diversity in terms of conflict and confrontation. (E.g., "Diversity creates conflict."; "Equity is addressed in niche disciplines.")

Tolerance: A worldview that sees difference "as an accepted anomaly or idiosyncrasy that is not necessarily desirable but accommodated." Also manifests as a compliance mindset. (E.g., "We have no choice but to comply with established targets.")

Blaming the Victim: A belief system that says responsibility for inequitable social conditions resides in individual or community deficiencies and/or lack of effort. Also manifests as cultural deficit thinking. (E.g., "Some women don't take the leaves in a way they should."; "Some immigrant populations focus incredibly strongly on promoting the education of their children.")

Tradition: A belief system which perceives that attending to cultural difference erodes the best of human and cultural knowledge, which is thought, in this ideology, to be the domain of Western European traditions. (E.g., "[Western canon] is a staple in academe."; "We have to be careful that with change we don't throw the baby out with the bath water.")

Political Correctness: A belief system that social group equality considerations are overly authoritarian and repressive, undermining various individual freedoms, including freedom of expression. (E.g., "No one can say anything anymore."; "Why is everything about race."; "We can't be everything to everybody.")

iii. The Myth of Meritocracy

The **myth of meritocracy** can be described as the mistaken view that cultural biases and social inequities do not factor into the assessment of individual capabilities (e.g., intellectual aptitudes, academic qualifications, and professional qualities), as well as what constitutes merit in past accomplishments and future potential for excellence in teaching, research, and/or leadership.

Systemic racism is reinforced by implicit and explicit bias and stereotypes about Indigenous and racialized communities. These inaccurate generalizations influence gross misperceptions about personal character, professional qualities, and competence, as well as academic capabilities and intelligence. Representation gaps among students, scholars, and staff in higher education are **not "achievement" gaps but rather "opportunity" gaps**.

While a commitment to the **ideal of meritocracy** should remain a foundational higher educational virtue, in fact, a pure meritocracy does not exist as not all peoples are on an equal 'playing field' when it comes to access and inclusion in the academy.[34]

The concept of inclusive excellence offers a paradigm shift away from the myth of meritocracy and introduces **more expansive and accurate methods of evaluating merit**. It promotes and embraces an equity lens to mitigate, if not remove, barriers to equal opportunity, to better attract, recruit, and support the greatest diversity of talent among prospective students, scholars, and staff.

In November of 2019, the Government of Canada's five major research funding agencies, the Tri-agencies (CIHR, NSERC, and SSHRC), as well as the Canada Foundation for Innovation (CFI) and Genome Canada, signed a Joint Statement endorsing the San Francisco Declaration on Research Assessment (DORA), which affirms a commitment to inclusive excellence in research evaluation.

DORA proposes eighteen recommended practices to improve the ways that research output is evaluated. The recommendations align with three themes:[2]

- The need to eliminate the use of journal-based metrics, such as Journal Impact Factors, in funding, appointment, and promotion considerations;
- The need to assess research on its own merits rather than on the basis of the journal in which the research is published; and
- The need to capitalize on the opportunities provided by online publication (such as relaxing unnecessary limits on the number of words, figures, and references in articles, and exploring new indicators of significance and impact).

2   San Francisco Declaration on Research Assessment. (December 16, 2012). http://sfdora.org/read/

2.2 Qualities of a Race-Conscious Leader

i. Social Positionality and Allyship

Race-conscious organizations are built by race-conscious leaders, who are acutely aware of their social group identities as they relate to the experience of social equity and who readily exercise their agency and allyship to advance EDI.

A **race-conscious individual** explicitly reflects on their ethno-racial identity and group membership, actively examines their personally mediated racial biases, considers their individual experiences with respect to racism, and acknowledges their **social group privilege** – the relative social benefits or advantage conferred due to social group membership.

Although one cannot 'give away' or eliminate privilege, one can leverage their privilege to exercise allyship, among other inclusive and antiracist leadership capacities. For example, leaders who are not members of racially minoritized groups but wish to demonstrate allyship can play a transformative role in personally supporting the development and advancement of Indigenous, Black, and racialized students, scholars, and staff by investing time to act as mentors, coaches, or sponsors.

- A **role model** is someone whose professional or academic qualities or accomplishments are admired and who others wish to emulate.
- A **mentor** is someone who talks with and helps others refine their professional or academic professional aspirations, plans, and goals.
- A **coach** is someone who guides others on specific professional, or academic objectives.
- A **sponsor** is someone who publicly recognizes and recommends others when they are not in the room.

A key component of allyship is embracing the principle of '**nothing about us without us.**' This principle requires that decision-makers meaningfully engage and co-construct policies with the participation of members of the marginalized communities affected by that policy.

ii. Inclusive and Antiracist Leadership Capacities

Scholars suggest that individuals seeking to be more effective in advancing EDI and antiracist organizational change must develop a set of cognitive, affective, and behavioural capacities[35,36] or "mindset, heartset, and skillset."[37] A 2016 Deloitte study uncovered six leadership qualities that foster organizational EDI change: commitment, cognizance, cultural intelligence, curiosity, courage, and collaboration.[38] Figure 5 maps the six inclusive leadership qualities to a set of proposed cognitive, affective, and behavioural capacities needed to effectively advance EDI.

Figure 5. Developmental Affective, Cognitive, and Behavioural Capacities for Antiracist Leadership[39]

HEARTSET
(feeling)
affective
capacities

MINDSET
(thinking)
cognitive
capacities

SKILLSET
(doing)
behavioural
capacities

HEARTSET (feeling) affective capacities

Commitment
- empathy
- compassion

Courage
- bravery
- humility
- allyship
- agency

MINDSET (thinking) cognitive capacities

Cognizance
- self-awareness (bias and privilege)
- awareness of historical & political contexts
- emotional intelligence

Cultural Intelligence
- culture specific & general knowledges
- inter/cross-cultural adaptabilty

Curiosity
- openmindedness
- suspension of judgement
- perspective-taking
- cognitive flexibility
- critical inquiry

SKILLSET (doing) behavioural capacities

Collaboration
- teaming
- empowering
- listening
- commuicating
- conflict resolution

iii. Racial Microaggressions and Intergroup Mistrust

"Seeing" racial biases and systemic inequities is a prerequisite to addressing them. However, leaders and decision-makers who do not have a lived experience of racial marginalization or who have not become acutely race-conscious will not easily recognize these biases and inequities.[40] This unawareness underpins the concept of **modern racism**,[41] which takes the form of unconscious everyday manifestations of prejudice and discrimination.

While most individuals accept that explicit forms of racism are physically and psychically harmful, those who do not have a lived experience of implicit and systemic forms racism must build leadership capacities to more effectively recognize and interrupt microaggressions.

Racial microaggressions are everyday behavioural slights or indignities that communicate hostile, derogatory, or negative messages to those they target, whether they are intentional or not.[42]

Differences between the experiences of persons who are the targets of racial microaggressions and the perceptions of persons who express racial microaggressions can create intergroup mistrust (Figure 6).

Figure 6. Perceptual and Experiential Differences Leading to Intergroup Conflict and Mistrust

For persons who are not racially minoritized, microaggressions are often expressed frequently due to unconscious bias and invisible privilege, and they are often perceived as minimially harmful, leading to perceptions that racially minoritized persons/groups as "hypersensitive".

For racially minoritized persons, microaggressions are recurrent generalizable not random isolated events, and they have cummulate negative psychic impacts, though it is difficult to "prove" the bias underpinning their expression.

2.3 Emotional Intelligence and an Ethics of Care

i. Emotional Response and Resilience

Confronting issues of racial bias, prejudice and inequality is unsettling and discomforting intellectually and emotionally, particularly for leaders who are not racially minoritized. EDI and anti-racism efforts can trigger what Robin DiAngelo has described as a set of **predictable or patterned responses** from white people, which she refers to as **white fragility**.[43] DiAngelo suggests that white fragility is in part due to white peoples' insulation from race-based stress and that it can lead to **behaviour** that is both **actively and passively** resistant – like denial, defensiveness, argumentation, rationalization, disengagement, withdrawal, hostility, minimization, tendency to hyperbole.[44] Underneath these behaviours are a mix of possible **feelings** such as fear, threat, guilt, sadness, and a sense of helplessness.

The range of **feelings described above are often triggered by cognitive dissonance**: a perceived conflict between (1) one's conscious perceptions of their core values and how they make sense of the world, and (2) one's unconsciously held biases and unawareness of hidden inequities in the cultural norms of practice imbedded in worldview due to socialization.[45]

This moment of cognitive dissonance can be catalytic if taken as a clue and cue for leaders to lean into the goals of developing ever-more intellectual and emotional humility – curiosity and empathy. However, leaders who get stuck in these feelings are those who may be unable to separate intention from impact (i.e., they become focused on defending their moral character) or those who may be unwilling to share space and resources (i.e., they become focused on holding on to power and control).

Working through emotions that may surface in response to change will support transformation towards emotional resiliency, also referred to as emotional intelligence. Gardenswartz, Cherbosque, and Rowe describe four areas for development in their Emotional Intelligence and Diversity (EID) Model:[46]

1. **Affirmative introspection** requires self-awareness combined with self-reflection on the individual's values, passions, preferences, and worldview.
2. **Self-governance** means managing emotional reactions to differences among people and to specific situations, so that the behavioural responses the individual chooses create constructive effects rather than self-defeating and destructive results.
3. **Intercultural literacy** refers to continually and nonjudgmentally exploring and understanding others' cultural norms in terms of values, beliefs, and behaviours.
4. **Social architecting** is a deliberate and conscious effort to structure relationships and social environments to increase the likelihood of productive and mutually beneficial relationships.

The EID Model suggests that emotions and emotional intelligence are influential determinants of EDI proficiency and recommends action across individual, team, and organizational domains (Figure 7).

Figure 7. Emotionally Intelligent Actions in Individual, Team and Organizational Domains[47]

Individual Level
Develop the emotional intelligence competencies and skills individuals need to function effectively in a diverse world.

Team Level
Develop the norms and skills needed to create emotionally intelligent teams that are inclusive and embrace diversity.

Organizational Level
Enable teams to use diversity to create synergistic solutions within an engaging and respectful environment.

Identify the principles, norms, and values that need to be developed, implemented, and communicated in order to become a truly inclusive organization with a culture of respect that succeeds in a diverse world.

ii. Trauma and Care

There is a growing body of literature that discusses the effects of racism (microaggressions and macroaggressions) on the psychic health and wellbeing of individuals. Leaders and service providers interested in advancing EDI and antiracism should develop **trauma-informed practices**:

- To recognize the widespread traumatic effects of racism on individuals and communities;
- To acknowledge the impacts on holistic health and wellbeing of the targets of racism;
- To consider the effects of trauma in the design and implementation of policies and in practice;
- To avoid re-traumatizing individuals through racial microaggressions and systemic racism; and
- To support empowerment and self-determination of racially minoritized communities.

An **ethics of care** approach, which centres the human experience and the wellbeing of individuals in relationship, is an important prerequisite to fostering trauma-informed practice and advancing EDI and antiracist change.

An ethics of care framework is complementary to the human rights framework that guides EDI work within higher education.[48,49]

It may be useful not only in facilitating challenging conversations related to racial microaggressions in the classroom but also for navigating increasingly complex campus equality and expression rights-related issues in and outside the classroom.

In other words, while it is essential to pursue the "science" of developing a data-informed and evidence-based strategy to successfully implement antiracist organizational change (which will be discussed in the next section), it is just as, if not more essential, to pursue the "art" of developing relational[50] and transformative[51] leadership practices. These leadership paradigms call for administrators who are considerate, caring, and compassionate, who demonstrate intentionality and integrity, who are inspiring and intellectually stimulating, and who influence others by modeling these and other ethical and empowering practices.

Section 2. Take-Aways

The following is a checklist of actionable take-aways from the concepts discussed in Section 2.

☐ Strive towards the hallmarks of a race-conscious institution to enact antiracist organizational change.

☐ Recognize and interrupt 'colour-evasive' narratives and other discursive barriers to antiracism.

☐ Challenge the myth of meritocracy and support expansive ways of evaluating excellence.

☐ Acknowledge and continually examine racial privilege and positionality.

☐ Exercise allyship including taking on roles as mentors, coaches, and sponsors.

☐ Develop emotional, intellectual, and behavioural capacities for antiracist leadership.

☐ Recognize and validate lived experiences of racial microaggressions.

☐ Develop emotional intelligence and resilience.

☐ Acknowledge the traumatic impacts of racism and exercise an "ethics of care".

Below are some suggested tools to help deepen conceptual learning and mobilize actions.

Recommended Reading:

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· Wing Sue, D. et al. (2007). Microaggressions in Everyday Life. *American Psychologist*, 62(4), 271–286.
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Resources:

· Complete the Power Flower Activity[52]
· Review the Personal Transition Curve[53]
· Assess the University's location on the Continuum on Becoming an Anti-Racist, Multicultural Institution[54]
· Review the Norms and Behaviors to Foster Organizations Operating in the EID Model[55]
· Complete the San'yas: Indigenous Cultural Safety Training Program[56]
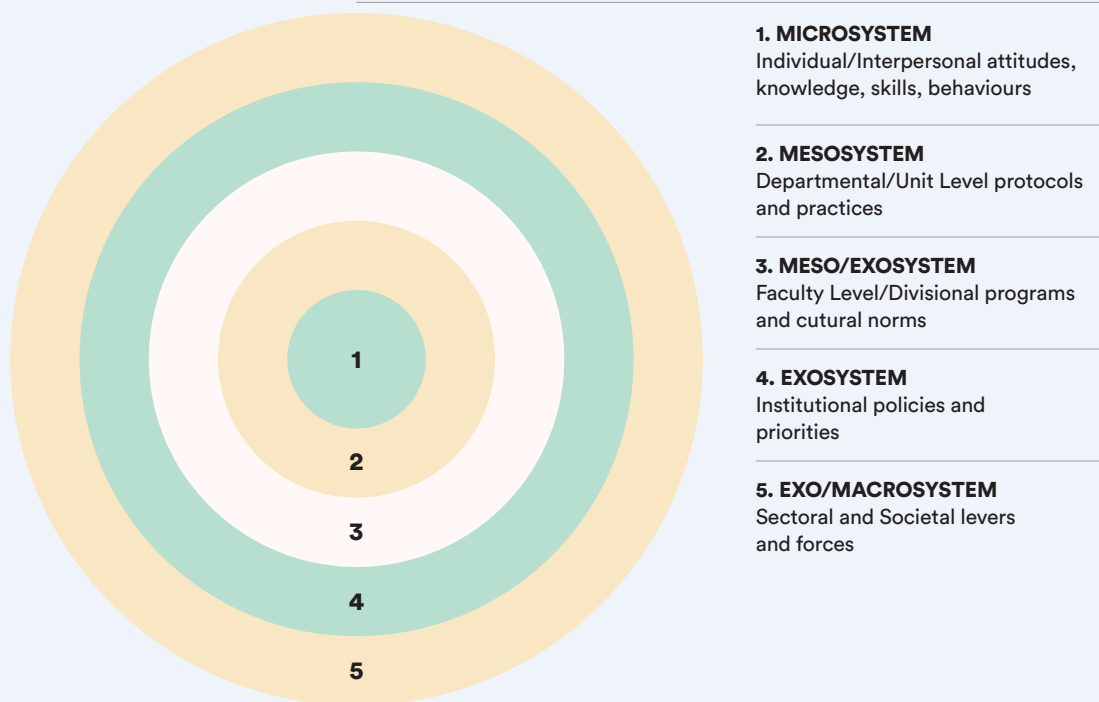
Enacting Anti-Racist Organizational Change

3. Enacting Anti-Racist Organizational Change

3.1 The University as a Social System

The university is a social system that comprises multiple nested micro-, meso-, exo-, macro- systems,[57] necessitating a socio-ecological approach to individual and organizational behaviour change (Figure 8).

Figure 8. Higher Education as a Socioecological System

1. MICROSYSTEM
Individual/Interpersonal attitudes, knowledge, skills, behaviours

2. MESOSYSTEM
Departmental/Unit Level protocols and practices

3. MESO/EXOSYSTEM
Faculty Level/Divisional programs and cutural norms

4. EXOSYSTEM
Institutional policies and priorities

5. EXO/MACROSYSTEM
Sectoral and Societal levers and forces

Systemic racism in higher education prevents Indigenous, Black, and racialized community members from fully accessing, participating in, and contributing to academia, thereby hindering the pursuit of academic, educational, and operational excellence.

Effective strategies must target (1) individual attitudes, knowledge, and skills; (2) interpersonal behaviours; (3) institutional policies, programs, and protocols; and (3) institutional priorities, cultural norms or "unspoken rules" and everyday practices that operate across the entire ecosystem.

Leaders also influence sector and societal levers, which act as enablers or barriers to advancing EDI and antiracism within higher education.
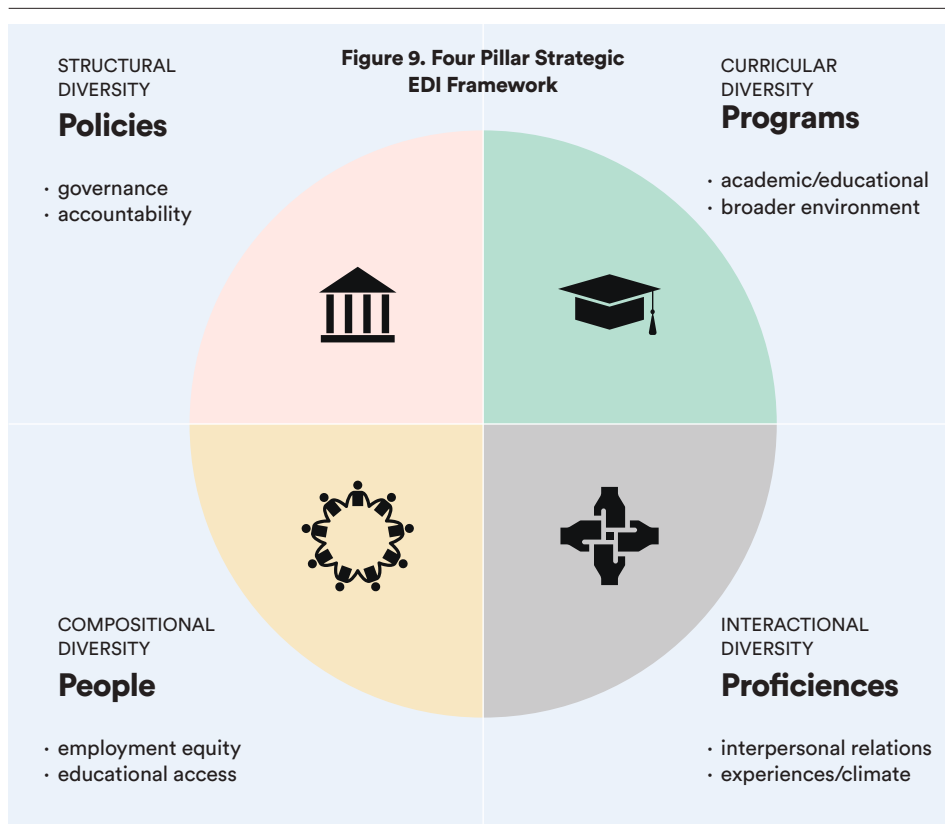
3.2 Strategic Action across the Academic Ecosystem

i. Strategic Framework for EDI and Antiracist Change

Figure 9 depicts an example of a four-pillar framework that anchors strategic priorities to four EDI domains: *compositional, structural, curricular,* and *interactional* that can be applied across the university ecosystem[58,59,60,61].

1. **compositional diversity** maps to **people** (administrators, faculty, staff, students) and strategic priorities in this domain would relate to employment equity and educational access outcomes;
2. **structural diversity** maps to **policies** (protocols, processes, practices) and strategic priorities in this domain would relate to governance and accountability outcomes;
3. **curricular diversity** maps to **programs** (academic, co-curricular, and extra-curricular) and strategic priorities in this domain would relate to teaching/research and broader educational outcomes; and
4. **interactional diversity** maps to **proficiencies** (attitudes, skills, knowledges) and strategic priorities in this domain would relate to interpersonal/group relations and individual experiences/climate outcomes

Figure 9. Four Pillar Strategic EDI Framework

STRUCTURAL DIVERSITY
Policies
· governance
· accountability

CURRICULAR DIVERSITY
Programs
· academic/educational
· broader environment

COMPOSITIONAL DIVERSITY
People
· employment equity
· educational access

INTERACTIONAL DIVERSITY
Proficiences
· interpersonal relations
· experiences/climate

The framework for EDI change can be used to guide a logic model approach for strategic planning, which considers the sequential relationship between inputs (resources), activities, outputs, outcomes, and impacts (goals). See Appendix I – Sample Logic Model Template for an EDI Strategy.

ii. Strategic Planning and Change Management

The **ABCDE Model**[62] for strategic planning provides a guide to planning strategic EDI change efforts in five stages:

A− **Assessment** of the internal and external environmental factors;
B− establishing a **Baseline** for past and current status of the organization for future goal setting;
C− development of the **Components** of a strategy including vision, values, mission and objectives;
D− developing of the specific **Details** of a plan including measures and tactics; and
E− **Evaluating** progress against objectives and the efficacy of implementation.

Below are some considerations when developing an EDI strategy that centres antiracism, mapped to the five stages in the A B C D E Model.

In the **retrospective phases** (assessment and baseline):
· Surface the experiences and perspectives of racially minoritized communities
· Review, contextualize, and build on previous reports and recommendations related to antiracism
· Assess individual, structural, and cultural resources and readiness for transformative change
· Work with key institutional offices to collect and report disaggregated and intersectional data

In the **visioning phase** (components):
· Invite and centre ideas and priorities identified by racially minoritized communities
· Align mission, vision, and values with and across instituitonal strategies
· Establish a framework with broad goals that will articulate the desired impact
· Identify a comprehensive set of objectives to address priorities

In the **actioning phase** (down to specifics):
· Collaborate with and recognize the work of racially minoritized communities
· Use a logic model to identify inputs, outputs, outcomes, and impacts
· Select from a range of output and outcome measures for SMART[3] objectives
· Consider short, medium, and long term initiatives so some effort is always placed on all objectives

In the **accountability phase** (evaluate)
· Establish mechanisms to consult with and receive input from racially minoritized communities
· Identify which measures will be key performance indicators (critical success factors) for reporting
· Establish website for transparent commnication of efforts and regularly report progress
· Enhance current and future efforts as required through continuous improvement processes

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[3] SMART – Specific, Measurable, Assignable, Realistic, Timebound

See Appendix II – Components of a Robust EDI Strategy for the Race Conscious Institution.

iii. Data-Informed Decisions and Evidence-Based Practice

As with any strategic change effort, it is essential to pursue data-informed decision-making and evidence-based practices to successfully advance antiracist organizational change. See Appendix III and IV – Sample EDI Output and Outcome Measures and Sample Disaggregated Race-Based Demographic Questions.

Evaluating the efficacy of interventions is essential to ensure the best deployment of resources. Enakshi Dua and Nael Banerjee identified five largely ineffective mechanisms deployed by universities to address inequities [63] – these are listed below with recommendations to improve their efficacy.

1. **Discrimination and Harassment Policies** are not sufficiently leveraged to address systemic discrimination – their capacity to invoke proactive and responsive climate and systems reviews is underutilized.
2. **Educational Tools** (and particularly workshops) are necessary but insufficient. Their outcomes are variable, in large part because they focus on awareness raising rather than skill-building, they do not attend to or are given the time to employ innovative pedagogy to achieve more meaningful outcomes, and they are individual interventions which do not directly address systemic inequities.
3. **Senior EDI Officers** mandated to address institutional EDI may not be seated at the necessary executive decision-making tables or governing committees, they are often under-resourced to adequately implement a comprehensive and sustainable EDI strategy, and they are challenged to establish a coordinated decentralized network of distributed campus-wide leaders who cooperate within a community of practice.
4. **Equity Plans** are not often anchored to or integrated with institutional strategies, and they often do not have adequate mechanisms to collect robust data to baseline, benchmark, goal set, and report on progress.
5. **Equity Committees**, when established, have tended to experience a lack of role clarity and lines of accountability, and they often do not have direct or meaningful mechanisms to interface with the senior-most administrators.

Organizational change will only be accomplished by ensuring the interventions target inequities where they are operating within the university ecosystem. Addressing individual personally mediated bias, stereotyping, prejudice, and discrimination requires microsystem interventions targeting individual and interpersonal attitudes, knowledge, skills, and behaviour. Addressing systemic discrimination imbedded in institutional structures and the culture requires mesosystem and exosystem interventions targeting organizational priorities, policies, programs, protocols, everyday practices, and cultural norms.

Figure 10. Improving the Efficacy of Individual and Systemic Interventions [64]

EDUCATIONAL TOOLS (WORKSHOPS, RESOURCES)

Content: human rights framework anti-racism, privilege, implicit bias, microaggressions, bystander intervention
Tailored to audience (students, faculty, staff, leaders)

Racism/Racial Oppression Systemic Discrimination

"institutional structures policies, cultural norms"

Racial Discrimination

"differential treatment"

Racial Prejudice

"pre-judgement"

Racial Stereotyping

"set image" (exaggerated/distorted image)

Implicit and Explicit Racial Bias

"preference" (based on values, attitudes, beliefs)

Policy Tools
· Discrimination & Harassment
· Response Protocols
· Systematic Pre/Post-vention

Strategy
· Integrated EDI Planning/ Plans
· Disaggregated Demographic Data
· Metrics/KPI and Reporting

Leadership
· Senior Central Diversity Officer
· Distributed EDI Champions
· Coordinated Decentralization

Governance
· EDI Councils and Committees
· Grassroots and Institutional
· Role Clarity/ Responsibilities

3.3 Leadership, Governance, and Accountability

i. Driving Change and Continuous Improvement

A Conference Board of Canada article entitled "Leadership, governance, and accountability: A pathway to a diverse and inclusive organization" asserted the following:

Successfully integrating change into any organization takes leadership, governance, accountability, and an iterative process of continuous improvement. The change required to build diverse and inclusive organizations is no different.[65]

Figure 11 depicts the continuous improvement cycle needed to successfully advance EDI and antiracist organizational change.

Figure 11. Continuous Improvement Cycle for EDI Organizational Change

Leadership is "the ability to influence, motivate, encourage and enable others to contribute towards the effectiveness and success of an organization."

Governance is "the mechanisms and systems used to ensure that appropriate leaders are involved, and established processes and policies are followed."

Accountability is "the acknowledgement and assumption of responsibility on the part of various leaders for their roles in performance management and process improvement."[66]

ii. Inclusive Governance and Collective Bargaining

Universities employ multiple governance models[67] simultaneously across their complex policy-making networks, though the most prevalent are the traditional bureaucratic and collegial models. The goal of advancing EDI in the academy is often complicated at the interface of these two governance processes.

As the utility of any governance model is limited by the analytical lens or frame of the decision-maker(s),[68] in a race-conscious organization, all institutional governance and decision-making tools and processes should be reviewed using an antiracist analytical lens. See Appendix V – Sample Racial Equity Analysis Tool.

Traditional university governance models have not sufficiently accounted for power differences inherent in racially stratified social and educational institutions. Adopting more transformative governance structures and processes will be crucial to building race-conscious institutions that aspire to become more inclusive, entrepreneurial, and collaborative.[69]

Furthermore, the highly unionized environments within universities add a level of complexity, however, equity and fairness are shared values and interests of the institutional management and the faculty and staff unions. Thus, there is an opportunity to counter fears that employment equity and inclusive excellence principles and practices are incompatible with the myriad of causes and concerns that deeply matter to employees (e.g., wage parity, seniority, permanence, work-loads, academic freedom, etc.). [70]

The following three practices[71] are recommended to facilitate more proactive and productive union-management discussions that relate to various social justice issues:

- Aim for a shared definition of social justice and understanding how it may apply to proposals;
- Use an agreed upon methodology to estimate costs for social justice related proposals; and
- Discuss how to lever the fundamentals of CB to address challenging social justice issues.

Figure 12 depicts a scenario where a university faculty hiring policy meets a departmental appointments bylaw and associate procedures. The case describes how it is possible to reconcile seemingly conflicting university and departmental values and interests, to advance EDI best practices in faculty hiring processes. See Appendix VI, VII, VIII, and IX – Sample Best Practices for Inclusive Excellence in Hiring, Sample Evaluation Criteria for Faculty Positions, Sample Rubric for Assessing Research, Teaching, and Service, and Sample Guidelines for Equitable Faculty Appointment Offer Negotiations.

Figure 12. Case Study: Governing at the Intersection of Equity and Collegiality

Scenario: Faculty Hiring Process

A Department Chair has been leading a faculty search process. They are following the Senate-approved University Policy on Faculty Hiring that includes procedures for implementing EDI best practices through the recruitment, assessment, and selection phases of the search. They are also following the Departmental Bylaw that sets out procedures for involving faculty members of the Department in the appointment of their peers. They present the shortlisted slate of finalists and the ranked order of recommended candidates for appointment to the Faculty Dean. The Dean is concerned that there is no gender or racial diversity among the shortlisted slate. Despite some reticence to revisit the process, the Dean exercised their inclusive leadership skills and change agency to persuade the Chair to pause the search and examine each of the recruitment, assessment, and selection phases to understand how the committee arrived at a slate of finalists that lacked any gender or racial diversity. Among other things identified for remediation, it was determined that this Department uses a "committee of the whole" procedure in all faculty hiring processes, creating the conditions for practices that are at odds with the spirit and aims of employment equity.

Policy Frameworks: University and Department

The **University Policy** dictates that every member of the Departmental search committee, which must include an appropriate proportion of gender and racial diversity, is to participate in the standard in-person 2-hour long implicit bias and equitable recruitment training delivered by the Employment Equity team.

The **Departmental Bylaws** dictate that the "committee of the whole"– every faculty member belonging to the Department – shall be given candidate materials and the opportunity to vote on their preferred candidate.

Principles and Priorities: Bureaucratic and Collegial Model

The evolved *bureaucratic* model underpinning the *institutional* structure and process activates a *delegated* decision-making process to *implement standard operating procedures* (using an EDI analytical lens) that aim to meet *institutional inclusive excellence priorities and employment equity goals*.

The *collegial* model underpinning the *faculty* structure and process uses a participatory (involving departmental faculty members) decision-making process to *engage consensus-building discussions* (among experts in the discipline) that aim to meet *peer constructed academic and professional expectations for expertise within the discipline*.

Dilemma: Formal Equality (Fairness) and Substantive Equality (Equity)
The *participatory committee* of the whole is a *collegial governance process that engages democratic principles* to ensure that every faculty member in the Department is engaged in this form of peer review and can use the same procedure to vote on their candidate of choice. While this *process promotes fairness and transparency within the Department, more can be done to promote equity and confidentiality for the candidates*. If the majority of faculty do not have a lived experience or cognizance of the ways that racialized biases and inequities operate at the individual, structural, and cultural levels, then this process may elevate a dominant view that perpetuates – intentionally or not – the status quo. Furthermore, candidates may not be aware that the entire faculty will know that they are applying for a position, which may be an issue for early, mid or late career faculty moving between schools.

The *delegated search committee* is an *evolved bureaucratic process that engages democratic and social justice principles* to *ensure that every job applicant is fairly and equitably considered, and the process is both transparent and confidential.*

Solution: Determining Actions Based on Shared Purposes
The Department Chair convened a meeting with the committee of the whole, inviting the University EDI Advisor and the Faculty Dean to speak to the dilemma. Through courageous conversations that were led by the Department Chair and supported by the Faculty Dean and the EDI Advisor, the committee of the whole determined to make the following changes to the Bylaw based on a genuine belief in the shared purposes of the Department and University:

- The committee of the whole sees the candidate profiles of those shortlisted by the delegated search committee
- The shortlisted candidates are informed that their materials will be reviewed by the committee of the whole
- The committee of the whole provides feedback but does not vote on or recommended a candidate of choice
- Feedback is collected using a guided evaluation rubric based on the job criteria developed by the search committee
- All faculty members are encouraged to participate in the standard implicit bias and equitable recruitment training

iii. Dedicated and Distributed Leadership

While all senior leaders and members of governing bodies must understand their responsibilities to advance EDI and antiracist organizational change, dedicated antiracism champions throughout the university and senior administrators with a mandate to champion institutional EDI and antiracism will be essential to mobilizing change.

Dedicated senior EDI personnel – or 'chief'/cabinet-level diversity officers (CDOs) must have an adequate sense of personal agency and level of authority to influence pan-institutional change. In the U.S., three models of CDO authorities have been identified across institutions of higher learning: collaborative (40% of institutions), unit-based (31% of institutions), and portfolio divisional (28% of institutions) models.[72]

Figure 13. Chief Diversity Officer: Archetypes of Vertical Authority[73]

Collaborative Officer CDO Model Characteristics

· One-person office with small support staff (secretary, student employee)
· No reporting unit structure/no supervision of lower-rank diversity officers
· Limited budget and narrow span of priorities
· Rarely involved in implementation of diversity initiatives at ground level

Unit-Based CDO Model Characteristics

· Presence of additional staff (e.g., administrative support professionals, program assistant, research assistant) to sponsor diversity initiatives
· Supervision of lower-rank diversity officers
· No reporting unit structures
· High value on building personal relationships on campus
· Direct collaboration with diversity and non-diversity-related units

Portfolio Divisional CDO Model Characteristics

· Most cost-intensive model (staff and resources)
· Direct collaboration with high-ranking administrators
· High value on building personal relationship on campus
· Presence and supervisor of lower-ranking diversity officers
· Direct relationship with reporting units (e.g., multicultural affairs, ethnic and gender studies)

Distributed champions must be adequately compensated through service recognition, stipend, or salary to lead EDI and antiracist priorities for Faculties, Schools, and Departments.

As well, mechanisms to promote "coordinated decentralization" and frequent communication of progress will improve efficiency, synergy, and transparency of dedicated and distributed efforts.

Section 3. Take-Aways

The following is a checklist of actionable take-aways from the concepts discussed in Section 3.

☐ Develop a multi-level pan-institutional EDI and antiracist framework for strategic action.

☐ Establish a framework for EDI change to guide a logic model approach to strategic planning.

☐ Engage a sound strategic planning and change management process.

☐ Engage data-informed decision-making and evidence-based interventions.

☐ Drive change and continuous improvement through leadership, governance, accountability.

☐ Use a racial equity lens to evolve governance structures (policies) and systems (processes).

☐ Enter union negotiations with an aim to concretize otherwise abstract social justice issues.

☐ Support dedicated central leadership and a coordinated network of decentralized champions.

☐ Promote frequent and transparent reporting on progress.

Below are some suggested readings and activities to deepen conceptual learning and mobilize actions.

Recommended Reading:
- Smith, D.G. (2015). *Diversity's promise for higher education: Making it work*, 2nd ed. Baltimore, MD: John Hopkins University Press.
- Creary, S. J. (2008). *Leadership, governance, and accountability: A pathway to a diverse and inclusive organization*. New York, NY: The Conference Board.
- Williams, D. A. and Wade-Golden, K. C. (2013). *Strategic diversity leadership: Activating change and transformation in higher education*. Sterling, VA: Stylus Publishing, LLC. ProQuest EBook Central. https://ebookcentral.proquest.com/lib/mcmu/detail.action?docID=3037606.

Resources:
- Develop an EDI strategy using the ABCDE Strategic Planning Model [74]
- Employ Kotter's 8-Step Change Model [75] through the strategic planning process

Appendices

Appendix I

Sample Logic Model Template for an EDI Strategy

STRATEGIC PILLAR 1 E.G., Compositional diversity	STRATEGIC PILLAR 2	STRATEGIC PILLAR 3	STRATEGIC PILLAR 3
IMPACT/ASPIRATIONAL **Goal 1:** **E.g.,** The campus reflects a community of learners, scholars, practitioners, and leaders that appropriately represents the demographic diversity in local, national, and global populations and particularly achieves parity in the composition of historically and contemporarily underrepresented communities.	IMPACT/ASPIRATIONAL **Goal 2:**	IMPACT/ASPIRATIONAL **Goal 3:**	IMPACT/ASPIRATIONAL **Goal 4:**

Guiding Principles

Principle 1.
E.g., COMMUNITY ENGAGEMENT – e.g., all efforts will centre and amplify the voices and perspectives of marginalized and minoritized communities)

Principle 2.

Principle 3.

Inputs	Objectives: Priority Themes for Strategic Action	Outputs	Outcomes
Funding Staff/Personnel Time Expertise Research Supplies/Equipment **E.g.,** leverage resources (time, expertise) from institutional planning office	1. **E.g.,** Engage an Equity and Anti-Racist Lens to Inform Data-Informed Planning and Evidence-Based Practices across Institutions	Products, deliverables, conditions that are generated from strategic activities **E.g.,** workforce census survey tools to collect disaggregated and intersectional demographic data, and messaging to promote completion	**Short-Long term** Changes in knowledge, awareness, behaviour, and skills as a consequence of strategic activities **E.g.,** workforce census survey response rates greater than 80% across all organizational units and annual reporting of disaggregated and intersectional diversity profile at all employee levels

Appendix II

Components of a Robust EDI Strategy for the Race Conscious Institution

Emerging	have not commenced but may be planning
Developing	have been planning and are in the process of developing
Transforming	have developed and are in the process of implementing

Self-Assessment Checklist: Components of a Robust EDI Strategy for a Race-Conscious Institution	E	D	T
☐ Have you **strongly articulated the case for diversity**, which situates equity, diversity, and inclusion (EDI) efforts as essential to the mission and to achieving excellence?			
☐ Have you established or **designated a senior administrative position** tasked with leading institution-wide efforts to strategically advance EDI and antiracist organizational change?			
☐ Have you engaged **senior leaders and members of governing bodies to develop antiracist leadership and governance capacities**?			
☐ Have you embraced a **data-driven strategic planning, implementation, and evaluation ethos**, which values qualitative and quantitative measures and indicators of progress?			
☐ Have you set **goals and objectives with measurable outputs, outcomes, and impacts** which you regularly monitor and against which you report progress?			
☐ Have you invested in creating robust and user-friendly **central data collection and dissemination systems** for more efficient and effective planning and reporting purposes?			
☐ Have you **delegated central and decentralized accountabilities** for advancing EDI and antiracism to key roles across institutional leadership teams to act as champions?			
☐ Have you established a **model of coordinated decentralization**, whereby central and local EDI champions communicate and collaborate to improve university-wide EDI and antiracism efforts?			
☐ Have you developed **recruitment and retention policies, procedures, and implementation tools** that integrate EDI, antiracism, and inclusive excellence principles and practices?			
☐ Have you engaged **regular climate reviews** to assess the perceptions and experiences of diverse community members, with the ability to disaggregate responses from racialized members?			
☐ Have you engaged in **campus-wide communication and continuous improvement** processes that support iterative planning, implementation, and evaluation activities?			
☐ Have you incorporated mechanisms for **regular consultation with and engagement of communities** most affected by systemic inequities, including racialized community members?			

Appendix III

Sample EDI Output and Outcome Measures

Outputs (Products, Deliverable, Conditions)	Outcomes (Knowledge, Awareness, Behaviour, Skills)	Impacts (Aspirational Goals)
Structural Diversity		
· % of unit EDI plans submitted annually · # and % polices and processes reviewed using EDI analysis · % strategic institutional documents articulating EDI priorities · % senior leaders and members of governing bodies EDI trained · % self-identified EDG among senior leadership · # self-identified EDG on governing bodies · # and engagement of alumni in EDI priorities · President's Office Webpage/ definitions and case · # recognition awards with EDI criteria	· # donors supporting EDI priorities · $ value of donor fund designated to EDI priorities · campus understanding of EDI/ inclusive excellence · # EDI pilot initiatives seeded with soft/one-time funds · # EDI initiatives sustained with hard/base funds · $ value and proportion of funds allocated for EDI priorities · Senior leadership visibility driving inclusive excellence · Extent of EDI analysis in strategic decision-making, policy development, resource allocation	Institutional systems, structures, policies, and processes enable and sustain EDI priorities.
Curricular Diversity		
· EDI benchmarks in Institutional Quality Assurance Program process · # of courses with EDI related Learning Outcomes · % of academic programs integrating EDI in curriculum · % of faculty employing inclusive teaching strategies · % EDG research chairs · % of research chair committees receiving EDI training · # and breadth of interdisciplinary academic and research programs	· Extent of EDI integration in academic programs · Self-reported EDI student learning · top-box or top-2-box* student experience (e.g., National Survey of Student Engagement, Canadian University Survey Consortium, etc.) · Extent of EDI integration in research and scholarship · Extent of interdisciplinarity in teaching and research · # research grants accepted on basis EDI considerations · # research grants rejected on basis of EDI considerations · Self-reported faculty and TA EDI capabilities * "Boxes" refer to a score and the number of people who chose the number score (or box) on a Likert scale. Top-Box or Top-2-Box refer to the number of people choosing the highest or the highest and second highest scores/boxes.	Institutional academic and broader educational programs and practices exemplify inclusive excellence as well as societal impact on a global scale.

Appendix III (cont.)

Outputs (Products, Deliverable, Conditions)	Outcomes (Knowledge, Awareness, Behaviour, Skills)	Impacts (Aspirational Goals)
Interactional Diversity		
· # of training/education opportunities · # of participants in training/education · completion rates of required online training modules: Accessibility for Ontarian with Disabilities Act, Sexual Violence Prevention and Response, Human Rights & Equity, etc. · # of complaints of discrimination, harassment, sexual violence · # of complaints resolved using voluntary resolution · # staff participating in EDI training · % of job descriptions incorporating EDI · # student leaders/groups participating in EDI training	· Positive change in attitudes, knowledge, skills · "top box" report positive climate and intergroup relations · EDI profile/reputation in the public eye · Self-reported staff EDI capabilities · Timeliness of complaint resolution	Campus climate is positive, respectful, and inclusive, and all members feel a sense of dignity and belonging.
Compositional Diversity		
· # & % self-identified EDG job applicants and interviewees · # and % of search committee members EDI trained · # and % EDG Managers, Directors, Chairs, Deans · # and % tenure-track and tenured EDG faculty · % of selection committee members trained · % of tenure and promotion committee members trained · % of research chair committees receiving EDI training · # and breadth of employment equity facilitators · # and % self-identified student applicants and offers · $ and % of financial aid/awards to under-represented students	· Progress closing workforce gaps · Efficacy of search, appointment, and nomination processes · "top-box" employee satisfaction, inclusion, engagement · "top-box" student belonging and flourishing (e.g., National College Health Assessment, etc.) · Census response rates for student and employee self-identification · EDI analysis of admissions policies and processes · Quality of local community partnerships · Student retention, persistence, progression · Underrepresented student enrolment, completion, further study · EDG employees hired, retained, promoted	Campus community reflects local and national demographic diversity, including proportionate representation of groups historically and contemporarily marginalized in higher education.

Appendix IV

Sample Disaggregated Race-Based Demographic Questions

1. Indigenous Identity. The issue of collecting self-identification data is fraught for Indigenous communities for reasons that include concern about institutional misuse of personal information and individual misrepresentation in relation to Indigeneity. The 2013 COU *Aboriginal Self-Identification Project Final Report* should be consulted, along with recommendations from ongoing national dialogue on the issue of Indigenous identity. One salient recommendation for questionnaires is to use the language of "identity" rather than "ancestry" to reflect that the question of self-identification is deeply interested in embodied lived experiences of Indigenous cultures, with Indigenous peoples, and on Indigenous lands, which may have contributed to differen-tial educational access and employment equity, rather than simply ancestral lineage.

Do you identify as Indigenous?
(Proof of Indigenous identity is not required for the purposes of this survey)

☐   No

☐   Yes. Please self-identify:

  ○   First Nations (status/non-status)

  ○   Métis

  ○   Inuit

☐   Prefer to self-identify: _____

☐   Prefer not to answer

2. Racial Identity. The Federal Government's Employment Equity Act uses and defines the term "visible minority" as persons, other than Indigenous peoples, who do not identify as Caucasian, European, and/or White in race, ethnicity, origin, and/or colour, regardless of birthplace or citizenship. The term racialized is more appropriate than and preferred as a replacement to "visible minority", however, it is advisable that a definition is provided for the term racialization.

How do you identify racially and/or ethnically? (check all that apply)

☐ Arab

☐ Black (including African, African-Canadian, African-American, Afro-Caribbean/
West Indian, Afro-Latinx)

☐ Chinese (including Mainland China, Hong Kong, Macau, and Taiwan)

☐ Filipino/a

☐ Indigenous outside of Canada (e.g., Nahualt, Maya, Quechua, Aymara, Mapuche, etc.)

☐ Indo-Caribbean/West-Indian, Indo-African, Indo-Fijian

☐ Japanese

☐ Korean

☐ Latinx (e.g., Brazilian, Chilean, Colombian, Mexican)

☐ North African (Egyptian, Libyan)

☐ Pacific Islanders or Polynesian/Melanesian/Micronesian (e.g., Cook Island Māori, Hawaiian Māʼoli, Fijians, Marquesan, Marshallese, Niuean, Samoans, Tahitian Māʼohi, Tongan, New Zealand Māori)

☐ South Asian (e.g., Bangladeshi, Pakistani, Indian, Sri Lankan, Punjabi)

☐ South East Asian (e.g., Cambodian, Malaysian, Thai, Vietnamese)

☐ West Asian (e.g., Afghani, Armenian, Iranian, Iraqi, Israeli, Jordanian,
Lebanese, Palestinian, Syrian, Yemeni)

☐ White (including European, White-Canadian/American/Australian/South
African)

☐ Multiracial/ethnic (with at least one parent in a non-White group above)

☐ Prefer to self-identify: _____

☐ Prefer not to answer

Do you identify as a member of a racialized group?
(The term racialized is more contemporary team, preferred over the term "visible minority", which is defined by the government of Canada in the Employment Equity Act as persons, other than Indigenous peoples, who do not identify as Caucasian, European, and/or White in race, ethnicity, origin, and/or colour, regardless of birthplace or citizenship.)

☐ No

☐ Yes

☐ Prefer not to answer

Appendix V

Sample Racial Equity Analysis Tool

To promote race-conscious policy and program design, systematically answer the following questions when drafting new or revising existing strategic and governance documents, including policies, procedures, terms of reference, bylaws, protocols, and guidelines for example.

Name of Document:

Drafting/Review Committee Details:

Faculty/School/Unit:

Department/Area:

Name of Lead:

Date:

1. How has the membership of the drafting or review committee been constituted to include (1) individuals who identify as Indigenous, Black, and/or racialized, AND (2) individuals who are equipped with racial equity analysis knowledge and skills.

2. What data has been collected to inform whether and how this policy/document may pose barriers to or have an adverse effect on Indigenous, Black, and/or racialized students, faculty, or staff?

3. What potential barriers and/or adverse effects have been identified in the policy/document, which groups may be disadvantaged, and what features or changes aim to remove barriers, mitigate adverse effects?

4. How has the drafting or review committee consulted AND engaged Indigenous, Black, and racialized community members and/or groups in considering and what advice or direction was provided?

5. How will communication and training on the interpretation and implementation of the policy promote racial equity?

6. What language, images, or messages might reinforce stereotypes and dominant cultural norms, and how will these be assessed and remediated?

7. How has the policy/document been assessed and remediated in terms of accessibility and gender-neutrality/inclusivity?

Appendix VI

Sample Best Practices for Inclusive Excellence in Hiring

The list below includes leading and emergent practices that have been shown to be successful in attracting a broader diversity of qualified applicants and engaging both equitable and meritorious processes to assess and select excellent candidates.

☐ A trained Equity Advisor participates on every Search/Nomination Appointment Committee

☐ Committees are diverse with requisite expertise and a 'critical mass' of EDG representation*

☐ All Committee members complete unconscious bias and relevant equity/antiracism training

☐ Employment Equity gaps are reviewed by the Committee Chair and reviewed by the Committee

☐ The Job Ad signals commitments to accessibility, employment equity, inclusive excellence

☐ A consistent agreed upon reference letter protocol is established and followed

☐ Both broad and targeted outreach strategies are used to recruit diverse talent

☐ All applicants are invited to self-identify by completing an Applicant Diversity Survey

☐ All applicants are asked to submit a Statement of Contributions to EDI and Inclusive Excellence

☐ The evaluation criteria rubric integrates EDI and inclusive excellence contributions

☐ Evaluation decisions are thoroughly deliberated to surface any biases or inequities

☐ The diversity of long/shortlists is monitored to ensure EDG candidates are equitably considered

☐ Interview questions include assessment of EDI and inclusive excellence contributions

☐ Employment Equity gaps are prioritized when multiple finalists are in the 'zone of excellence'**

☐ A Search Summary Report is completed, documenting the process and any challenges

☐ Appointment offers are made considering equitable negotiation principles

☐ Strategies are implemented to support, develop, and retain new hires

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 * Committees should aim for a '**critical mass**' of equity-deserving groups (EDGs) – striving for 50% representation by women and 30% comprising Indigenous, racialized, persons with disabilities, and members of sexual orientation and gender identify minoritized communities.

** The concept of a '**zone of excellence**' is used to encourage "expanded ways to measure excellence", inviting Committee members to consider the totality of a prospective candidate's past accomplishments and promise for future research, teaching, service, leadership, and operational excellence within the context of a range of qualifications identified in an evaluation criteria rubric and that integrate EDI considerations. The zone of excellence framework contemplates that there could be more than one excellent candidate who will be deservingand capable of delivering on the expectations that come with filling the role. This framework stands in contrast to the paradigm that there is necessarily 'one best' candidate, often determined through very narrow and conventional academic conceptualizations of excellence which have been shown to disadvantage members equity-deserving groups (EDGs).

Appendix VII
Sample Evaluation Criteria for Faculty Positions

Category of Qualification	Research (Productivity and Impact)				Teaching (Effectiveness and Innovation)				Service (Citizenship and Collegiality)			Scoring	
Rate the candidate's demonstrated qualifications as well as evidence of potential/ promise for each of the selection criteria which are aligned with the bona fide job requirements: 1 – poor/limited 2 – fair 3 – average 4 – very good 5 - excellent	Research productivity and scholarly impact*	Research collaboration and Interdisciplinarity	Acquisition of research funding	Strategic priorities alignment and enhancement	Attracting and effectively supervising G students	Effectively teach and supervise UG students	Support and mentors a diversity of students	Innovate practice and curriculum design	Foster collaboration and positive climate	Support inclusive excellence priorities	Support community engagement priorities	Rate the candidate's qualification as poor, fair, good, or excellent for each criterion and attributed the corresponding numeric rating. The Committee Chair must engage the Committee membership in a robust discussion to comprehensively examine whether and how personally mediated biases a nd systemic barriers may be factoring into the assessment of candidate qualifications. In other words, the candidates who proceed to the next stage – shortlist or interview – will not simply be selected on the basis of a numeric score and rank order.	
Candidate Name												Comments	Rank
	Rating												

*The Declaration on Research Assessment (DORA) cautions against narrowly fixating on journal impact factors as proxies for demonstrated or potential for excellence.

Appendix VIII

Sample Rubric for Evaluating Excellence in Research, Teaching,
and Service

Criteria	NO No Evidence of potential for or demonstrated:	LO Little or no evidence of potential for or demonstrated:	ME Some evidence of potential for or demonstrated:	HI Considerable evidence of potential for or demonstrated:
Research Productivity and Impact, and Scholarly Achievement				
Research productivity and scholarly impact*	· acceptance of papers and manuscripts for peer-reviewed publication (where applicable) · invitations to present conference papers, university seminars, or exhibitions or performances · critical reviews of published works and/or research creations · innovations in research, scholarship and creative achievements that advance EDI · research and scholarship that address diverse societal issues and needs · artistic expression, cultural production or innovation activity that reflects culturally diverse communities and amplifies the voices of historically underrepresented or absent communities · research that addresses the experiences of EDGs in higher education			
Research collaboration and Interdisciplinarity	· participation or leadership on collaborative and interdisciplinary research programs · engagement in collaborative and interdisciplinary research programs · constitution of and engagement with diverse research teams · work to examine unconscious bias and foster EDI in research programs and teams · interculturally competent mentoring in graduate supervisory and research team settings			
Acquisition of research funding	· approval of research grants · academic awards · ability to acquire and/or renew funding by demonstrating application of EDI principles · ability to collaborate/partner to secure/leverage funding requiring application of EDI principles			
Strategic priorities alignment and enhancement	· alignment with university's current and/or emergent areas of research strength · alignment/ enhancement of Indigenous, Internationalization or Inclusive Excellence priorities · expertise in serving diverse national and regional economic, social and cultural needs · broader program of research concerned with eliminating social disparities (e.g., access to health care, educational advancement, political engagement, social mobility, human rights)			
Teaching Effectiveness and Innovation				
Effectively teach and supervise undergraduate students	· high quality teaching · teaching awards · able to assess students' performances in an equitable and effective manner · supporting and mentoring diverse undergraduate, and particularly underrepresented students · scholarly command of subject · supervising and mentoring diverse graduate students (particularly underrepresented students) · engagements with students that advance diversity and inclusion			

Appendix VIII (cont.)

Criteria	NO No Evidence of potential for or demonstrated:	LO Little or no evidence of potential for or demonstrated:	ME Some evidence of potential for or demonstrated:	HI Considerable evidence of potential for or demonstrated:
Attract and effectively supervise graduate students	· scholarly command of subject · supervising and mentoring diverse graduate students (particularly underrepresented students) · engagements with students that advance diversity and inclusion			
Support and mentors a diversity of students	· willing and able to assist students in understanding the subject · participating in recruitment/retention effort to enhance EDI among students and faculty · experience mentoring students from underrepresented groups in higher education · a record of service aimed at expanding educational access, including building or leading bridge and mentoring programs for undergraduate and graduate students			
Innovate practice and curriculum design	· excellence in teaching practices · adoption of teaching innovations of others · curriculum development and/or evaluation · research on teaching or pedagogy and presentation of scholarship (for teaching track) · leadership in experiential and/or community engaged learning (teaching track) · mentoring of other teachers (for teaching track) · engagement in interdisciplinary and/or intersectional teaching practices · curricular innovation and diversification · engaging with diverse learning communities in and outside of the classroom · experience innovating pedagogy and curriculum to engage a diversity of learners			
Service, Citizenship, and Collaboration				
Foster collaboration and positive climate	· assist at some level in committee work of University · perform assignments diligently and effectively · engagement in service related to professional association · employing effective conflict resolution and coaching skills in interactions with peers and community members · work to examine unconscious bias and foster EDI in the workplace and learning environments · effective facilitation, conflict resolution and coaching skills to manage classroom discussions · contribution to understanding of conditions that enhance accessibility and inclusion			
Support inclusive excellence priorities	· engagement in service related to international activities · work as a change agent/ally to advance inclusive excellence in unit or university · involvement in and/or leadership on formal committee work to advance inclusive excellence			
Support community engagement priorities	· engage in service related to the role of the University in the local community · engagement with diverse communities and contribution to social development goals · mentorship and support of the career development of more junior peers · partnerships in outreach and service that promotes EDI among students			

*In November of 2019, the Government of Canada's five major research funding agencies, the Tri-agencies (CIHR, NSERC, and SSHRC) as well as the Canada Foundation for Innovation (CFI) and Genome Canada, signed a Joint Statement endorsing the San Francisco Declaration on Research Assessment (DORA), which affirms a commitment to inclusive excellence in research evaluation and cautions against narrowly fixating on journal impact factors as proxies for demonstrated or potential for excellence.

Appendix IX

Sample Guidelines for Equitable Faculty Appointment Offer Negotiations

The principles and guidance below represent an initiative undertaken by one member institution to proactively support Deans in their consideration of EDI in offer negotiations.

Principles

This checklist, which is not exhaustive, has been generated to guide Deans in their consideration of issues of accessibility, equity and inclusion as they strive to foster a fair and transparent process for negotiating employment offers to recruit and retain new faculty hires.

Guidance

Deans are encouraged to construct fair offer packages that are appropriately responsive to individualized faculty circumstances, while avoiding creating, reproducing or deepening any new, existing or future inequities across identifiable faculty groups. When negotiating with diverse candidates, consider accessibility, equity and inclusion implications for individuals and groups with respect to:

☐ starting salary[4]

☐ rank and tenure

☐ start date

☐ dual career/spousal/partner appointments or career supports

☐ reimbursement for visits to secure housing

☐ travel and home relocation reimbursement

☐ general benefits (e.g., health, tuition benefits for family)

☐ contract renewal and tenure

☐ retirement and pension

☐ distribution of time for teaching, advising, research, service and administration

☐ course release time

☐ research and teaching assistants

☐ research support (including creative work and lab start-up funds)

☐ travel and discretionary funds

☐ research leaves

☐ administrative support

☐ office and/or lab space, equipment and supplies

☐ mentorship

Equal Pay for Equal Work vs Equal Pay for Work of Equal Value

Equal pay **for equal work** addresses parity of compensation across identifiable groups, across gender or racial identity for example, who do the same work. **Pay Equity** is a federally legislated concept, referring to equal pay **for work of equal value**. Pay equity requires a comparison of female dominated vs male dominated jobs of comparable value, on the basis of the level of skill, effort, responsibility and working conditions involved in doing the work. In 2016, the Canada government reaffirmed its commitment to develop proactive pay equity reform.

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