Toward a New Normal

Equity, Diversity and Inclusion as Integral to Research and Innovation Excellence: Models for Success

Outcomes from Gender Summit 11 North America
Montreal
November 6–8, 2017

Gender Summit® 11
2017
North America
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Prepared in collaboration with the Natural Sciences
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The goal of NSERC, the Fonds de recherche du Québec, Portia Ltd. and other co-organizers of Gender Summit 11 North America (GS11NA) in publicizing the Gender Summit 11 Declaration and this report is to encourage commitment to progress and engagement in implementing equity, diversity, and inclusion actions. As concrete outputs of GS11NA, these documents are designed as tools to promote the objectives of building better science knowledge and better research and innovation practice, and to influence research-related policy design and implementation.

For more information about the Gender Summits, visit www.gender-summit.com.

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Recommended citation:

Hosts

Co-organizers

Patronage

Gender Summit 11 Declaration

Taking action to increase research excellence through equity, diversity and inclusion

Gender Summit 11 highlighted the following action items, which individuals, managers, departments, faculties, organizations, corporations and others involved in research and innovation are encouraged to act on:

A. Promote institutional systemic change:

- Adopt internationally recognized evidence-based standards, policies and practices for equity, diversity and inclusion in research institutions and businesses or departments and laboratories thereof;

- Develop an equity, diversity and inclusion systemic change plan for your unit, laboratory, department, faculty, board, community, business or organization based on readily available extensive research and best practices – involve many voices;

- Allocate resources to your systemic change plan;

- Increase the diversity of those in organizational leadership positions and roles with the goal of equitable representation and inclusion – reflect your community;

- Monitor and report to your unit, laboratory, department, faculty, board, community or organization on progress made.

B. Strengthen research and innovation communities by implementing concrete steps:

- Provide equity, diversity and inclusion best practices training and increase awareness of your community and allies;

- Identify and remove barriers and intentionally enhance inclusion – diversity improves results;

- Implement measures such that the full pool of talented researchers can equitably access and benefit from research positions, career advancement, apprenticeships, research and training funding, awards, mentoring, opportunities, research facilities, etc., and prioritize retention;

- Take steps to ensure that research leadership roles are occupied by top researchers and innovators in all their diversity;

- Collect, analyze and publish data on under-represented group participation levels;

- Recognize that the evaluation of research and researcher excellence as currently understood and practised is not equitable; implement evidence-based changes;

- Clarify and convey the value of interdisciplinary approaches, collaboration and different types of knowledge.

C. Increase the social relevance and impact of research and innovation

- Require research focus, design, analysis, interpretation, dissemination and implementation of innovations to integrate consideration of the diversity and inclusion of individuals and communities impacted at all stages and levels;

- Recognize that relevance and/or impact of research and innovation is different for different populations and contexts;

- Recognize and apply broader understandings of research excellence.

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1. Introduction: Acting on the Extensive Body of Evidence Available

Gender Summit 11 North America (GS11NA) demonstrated and validated the need for increasingly focused and effective equity, diversity and inclusion (EDI) initiatives for change. The drive for EDI in research and innovation is not new, untested or undefended; it is evidence-based and it is underway. A broad range of individuals, organizations, universities, industries, businesses and other bodies are already taking concerted action and changing established research cultures and systems in many parts of the world.

The cutting-edge input from presenters and participants captured here provides direction for effective and successful EDI strategies.[1] This report is presented as a catalyst to inspire and inform increasingly substantial and systemic initiatives. It describes precedent-setting changes that have been made and sets high standards and expectations for new or expanded EDI actions to lead to systemic change. These precedents and plans establish a new normal that will resist the tendency to revert to old norms when social pressure and momentum to address EDI issues is reduced.

The goals of GS11NA were focused on practical solutions, success stories and lessons learned to help identify promising practices — a concise orientation to EDI initiatives in current research and innovation contexts — and initiatives for change — concrete examples of actions undertaken in a variety of contexts. Contributors were invited to respond to this focus. Selected initiatives for change presented at GS11NA are included in the endnotes as resources to support the momentum for moving toward a new normal.

This report provides confirmation of the current climate for change and an overview of some initiatives already underway in Canada, the United States and beyond. It is intended as a resource for maintaining and building on the momentum for change for the Gender Summit community and other advocates for EDI in research and innovation.

The whole landscape of research, innovation and business is implicated in responding to the need for change on the premise that we are not leveraging our most important resource, which is human capital. Taking concrete action that mimics, adapts and builds on knowledge of successful initiatives elsewhere can enhance performance in laboratories, education, academia, postsecondary institutions, industry, business, government, and funding agencies. These changes can only be accomplished through the equitable and inclusive involvement, commitment and accountability of leaders, EDI experts, researchers, educators and other collaborators representing a diversity of perspectives, knowledge, understandings and experience.

"GS11NA has allowed us to lift above the canopy of trees to see the whole landscape. It is like an accelerator/ fast lane for some of us to see what works. It helps us to understand others' experiences and solutions, to adapt and apply them to our own culture and context so that we can get to the goal faster."

— Bryan Gaensler, Professor, Dunlap Institute for Astronomy and Astrophysics, University of Toronto

2. Background: Gender Summits and the Need for an Evolving Understanding of EDI

GS11NA was the 11th Summit of its kind, and the first to be held in Canada. The event was co-hosted by the Natural Sciences and Engineering Research Council (NSERC), the Fonds de recherche du Québec and Portia Ltd. UK in Montreal and attracted over 675 participants.

Gender Summits are platforms for dialogue, and their evolving focus reflects global advancements in our collective understanding of changes needed to embrace and integrate EDI principles to advance research while broadening its relevance and ensuring applications of findings are equitable. Participants examine new practices and research showing when, why and how EDI considerations impact outcomes. Summits provide a mechanism for linking individuals and communities from different regions of the world and various sectors to engage in joint and transformative actions targeting shared needs.

As noted by Dr. Elizabeth Pollitzer, Co-founder and Director of Portia Ltd. UK, the focus on "plurality" at GS11NA was a step toward closer connections between research endeavours and societal changes and expectations. Plenary panels brought to the fore perspectives of LGBTQ2, Indigenous, youth, disabled, and racialized communities as well as issues specific to industry, the academy, government and funding agencies. All participants in GS11NA contributed to the development of concepts, strategies and actions that are key to moving EDI forward as essential components of what constitutes excellence in research and innovation.

3. Institutional Systemic Change: The Role of Progressive Leadership

*"...if we want diversity and inclusion to happen, we need leadership.
You need to set goals and show leadership. You have to have an objective,
state it clearly and enforce it. The key is enforcement. It is a struggle every day,
but it's important to stay the course on that objective. Otherwise, the old habits
creep in and the system wins and then we are back to square one."*

— Yves Desjardins-Siciliano, President and CEO, Via Rail Canada

*"It is vital to build a community of change makers and embed EDI in the DNA of
the organization, to attract the best students and people and funding."*

— Tracey Scarlett, Dean, JR Shaw School of Business, Northern Alberta Institute of Technology

*"The burden of EDI work should fall on those with power and privilege,
not the under-represented groups."*

— Imogen R. Coe, Dean, Faculty of Science, Ryerson University

Leaders who set the tone for embedding EDI measures and practices in their organizations and governing bodies are essential and establish the climate needed to reap the benefits of EDI, such as improved governance, increased economic performance and more innovation.[2] They understand that the culture, values and processes of the organization need to change in parallel with changes in outmoded individual behaviour. By recognizing the benefits and impacts of integrating EDI principles, leaders can build an ecosystem within the organization where internationally recognized, evidence-based and inclusive values and practices are embraced. From there, they can reach outside their organizations to build collaboration and common purpose with partners.

Progressive leaders prepare their organizations to include and benefit from diverse talent. They engage EDI change agents and provide them with resources. They understand that accountability and consequences are key in effecting behavioural change, and that EDI initiatives challenge discriminatory relationships of power and privilege. Progressive leaders require an effective internal change plan that reflects evidence-based strategies and is under constant review. Plans and programs must be data-driven with regard to the organization's current state and should contain regularly adjusted targets, goals and objectives.

Change management starts with self-reflection, by an individual, a division and/or an institution. Data gaps can be identified and targets set, along with proposed mechanisms for achieving set goals and methods for course correction and self-analysis along the way. Targets are a way to foster quality in research by setting goals for the intentional inclusion of previously under-represented groups (including women, visible minorities, Indigenous peoples, people with diverse gender identities and people with disabilities). Public statements from leadership along with transparent plans, policies and actions are central factors for achievement of EDI objectives. Leaders set the tone and must convey that, while bad practices disadvantage certain groups, good practices advantage everyone. They manage the challenges that are inevitable with organizational change – anxiety, hostility, increased microaggressions, etc. They set the tone for people to be able to bring their whole self to work or school, reducing fear of discrimination.

Concrete actions presented: Tools for leaders and their designated EDI experts

- Challenge governance and evaluation from an EDI perspective to increase fairness and decrease discrimination. Adopt a charter for EDI-sensitive research governance and evaluation[3] and develop a framework of actions for implementation[4, 5]

- Use models/best practices for systemic change, dedicate personnel and budgetary resources, adapt and customize the models (such as Athena Scientific Women's Academic Network [Athena SWAN] UNESCO STEM and Gender Advancement project [SAGA] and STEM Equity Achievement Change [SEA Change]) to ensure fit with institutional culture.[6]

- Create and implement a transparent and deliberate action plan with clear expectations — a plan that is suited to the organization and its culture. Give management responsibility, power and resources to implement the action plan.[7]
  - Set targets with respect to under-represented groups.[8]
  - Set timelines for review and adjustment of action plans; use incentives and rewards such as linking funding to reaching and maintaining targets.[9]
  - Monitor outcomes and evaluate actions as steps to success.[10]

- Corporations take responsibility and concrete actions to be role models of EDI.[11]

- Provide equity and anti-bias training to all, with specific training for hiring committees.[12]

- Use creative solutions, such as cognitive integration of sex and gender into clinical practice guidelines in physician education.[13]

- Sign on to an EDI spirit of inclusion letter as was done at General Electric Canada.[14]

- Establish objectives and follow principles to advance EDI.[15, 16]

- Ask questions that measure the impact of policies in education and research, such as the Canadian Institutes of Health Research's (CIHR's) questions about accounting for sex and gender in research, to support the highest standards of excellence.[17]

4. Strengthening Research and Innovation Communities

Promoting an organizational culture that values EDI and the subsequent benefits is as important as implementing effective policies. The role and objectives of equity professionals should affect the organization at all levels. They use their skills and experience in EDI policy, history, governance, impacts and processes to deliver strategic advice and training on evidence-based strategies to help make change happen. They can employ tested and proven strategies to mitigate bias in the workplace, labs and classrooms and in the review of funding applications, in the case of granting agencies.

However, all individuals need to take responsibility, reflecting on their own level of EDI awareness and cultural competencies and identifying where action is needed to embrace EDI principles in their own work and workplaces. In both human resources and research content, it is recognized that accurate data must be collected and aggregated across a range of diversity categories. Research subjects should include those impacted by the research questions and should reflect the population to which the results will be applied. For relevant and impactful results, initiatives include under-represented groups in decision-making roles and on important decision-making bodies, such as ethics committees.

Criteria for success are adjusted away from the predominating Western, primarily masculine scientific model to value and integrate a plurality of methods and contexts. The notion of linear career paths and the current narrow criteria to assess excellence in research need to be rethought and reimagined in such a context. Practices such as adopting the use of a narrative CV are part of this new method that de-emphasizes factors such as number of publications and introduces other criteria for achievement. The organization's community as a whole understands that EDI actions, policies, programs and initiatives need to be sustained and ongoing at all levels.

Individuals and groups are supported in meeting diversity criteria in a climate that values and practices constructive feedback. Because an organization that is vibrant in EDI values and actions provides and monitors mentorship and career development for all its members, each person in this context understands that they will be supported in achieving their full potential. Such a context builds the full pool of talent needed in an inclusive way, leading to greater productivity and impact.

Concrete actions presented: Tested strategies to consider

- Conduct deliberate outreach to and recruiting of under-represented groups.[18]
- Widen the pool of talent to broaden perspectives and enhance excellence.[19]
- Support training and education for peer reviewers.[20]
- Support all in the organization in achieving their potential through good training and anonymous review mechanisms.[21]
- Empower staff with data about the position of under-represented groups and with training to respond with awareness and understanding.[22]
- Provide training and support, such as mentoring, for under-represented groups.[23]
- Provide EDI training for the research community.[24]
- Mobilize and transfer EDI knowledge.[25]

"Nothing guarantees that change will stick. It's hard and it requires time. If we release the pressure, the system doesn't have the memory to sustain changes."

— Jeremy Kerr, Professor, University Research Chair in Macroecology and Conservation Biology, University of Ottawa, and President of the Canadian Society for Ecology and Evolution

"Don't assume that immigrants all have the same experiences: they don't, so we need to take that into consideration when making policies. Context matters a great deal in how policies are framed and how we think about the different dimensions of inequalities and how they intersect."

— Gita Sen, Distinguished Professor and Director of Ramalingaswami Centre on Equity and Social Determinants of Health, Public Health Foundation of India

5. Increasing the Social Relevance and Impact of Research and Innovation

"The importance of participatory research is crucial for co-developing the questionnaires, consent forms and analyzing the data together. This cannot help but be conclusive. We must take the time to make this crucial step and put the necessary resources in place" [loose translation].

— Suzy Basile, Professor, School of Aboriginal Studies, Université du Québec en Abitibi-Témiscamingue

"EDI training in grants programs instantly moves the dial. Grant applications that require attention to EDI in both the content and personnel of the research project can lead to cultural change."

— Jeremy Kerr, Professor, University Research Chair in Macroecology and Conservation Biology, University of Ottawa, and President of the Canadian Society for Ecology and Evolution

By taking responsibility for embedding EDI considerations in research content and processes, the research and innovation communities can drive change. Linkages can be created among the academy, industry and wider society to build a mutual understanding of issues and broaden influences on policy. Research that recognizes and values different competencies and knowledge, and has a broadened understanding of research and researcher excellence, can open pathways to inclusion of under-represented groups. Such an understanding counters the exclusionary, hyper-competitive and narrow merit indicators of excellence that inform predominant Western scientific models. Gaps in research topics can be reduced by increasing and recognizing the contributions of the full pool of researchers.

We have reached the point in transformative research and innovation where critical self-awareness of assumptions, biases and values – and their influence on understanding and interpretation – is recognized as a professional competency. It is understood that individuals are shaped by the interaction of different social locations. Research content is constructed by research subjects and researchers based on this knowledge.

Research subjects contribute qualitative data that brings depth and increased complexity to quantitative data. Understanding the intersectionality of more complex data requires increasingly disaggregated data and analysis. Excellence in research requires deliberate questioning of assumptions, the addition of EDI champions on research teams, and the use of incentives to help embed EDI considerations into research design and analysis. EDI considerations bring an additional powerful axis of understanding to research activities and outputs. Measures of excellence should include consequences of failures to incorporate that understanding.

Concrete actions presented: Apply tested strategies to increase research excellence

- Integrate the understanding that diversity increases the impact of research and innovation.[26]
- Publicize studies that show the positive impact of diversity, such as the recent study by McKinsey & Company.[27]
- Make it mandatory to account for EDI consideration in research.[28]
- Require EDI champions on research teams.[29]
- Promote critical self-awareness of assumptions, biases and values at all levels of an organization.[30]
- Seek out the stories of those who have not been included.[31]
- Co-develop research and analysis as a collaboration between subjects and researchers.[32]
- Create narratives instead of simply collecting data using the predominant Western scientific method.[33]
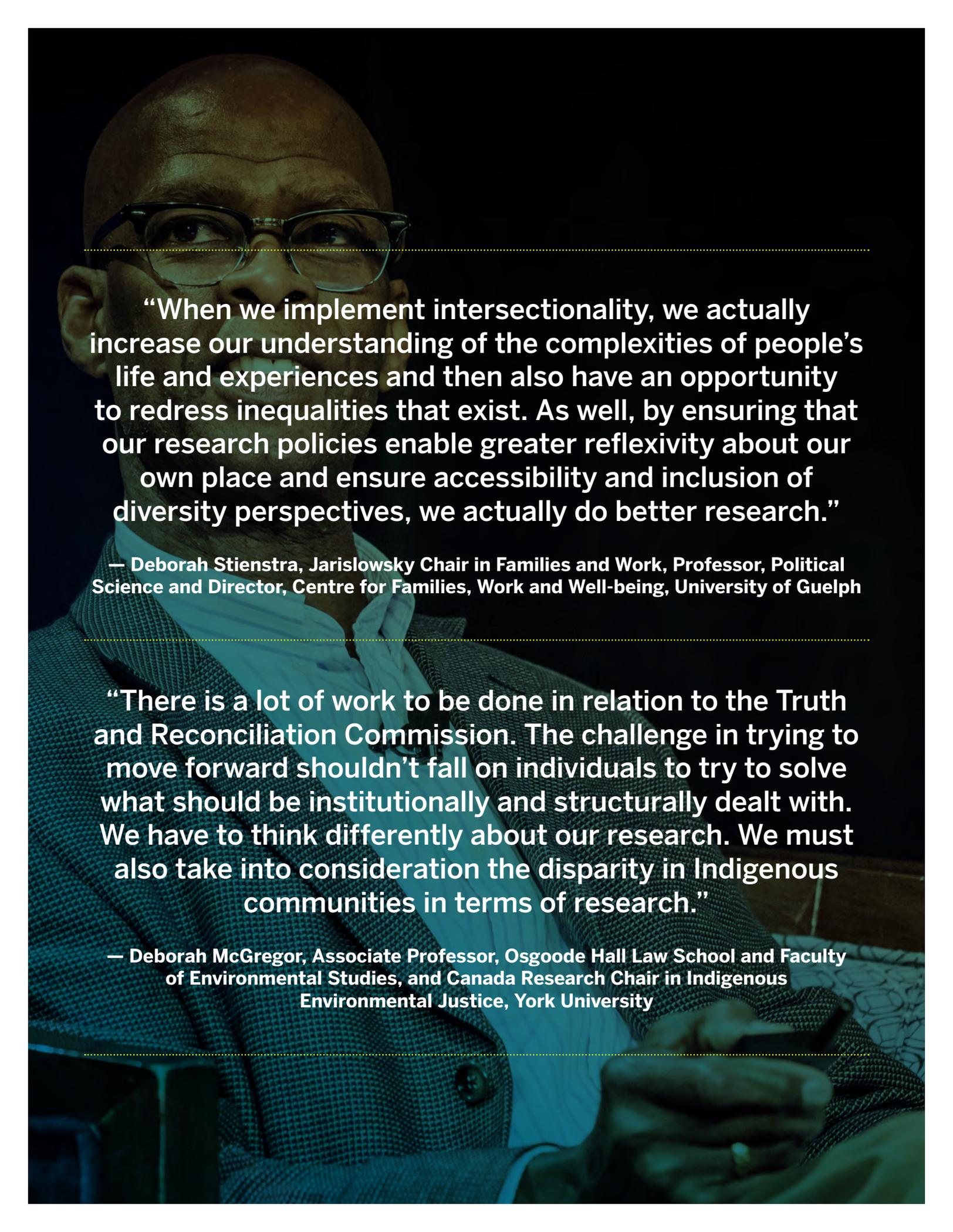
"When we implement intersectionality, we actually increase our understanding of the complexities of people's life and experiences and then also have an opportunity to redress inequalities that exist. As well, by ensuring that our research policies enable greater reflexivity about our own place and ensure accessibility and inclusion of diversity perspectives, we actually do better research."

— Deborah Stienstra, Jarislowsky Chair in Families and Work, Professor, Political Science and Director, Centre for Families, Work and Well-being, University of Guelph

"There is a lot of work to be done in relation to the Truth and Reconciliation Commission. The challenge in trying to move forward shouldn't fall on individuals to try to solve what should be institutionally and structurally dealt with. We have to think differently about our research. We must also take into consideration the disparity in Indigenous communities in terms of research."

— Deborah McGregor, Associate Professor, Osgoode Hall Law School and Faculty of Environmental Studies, and Canada Research Chair in Indigenous Environmental Justice, York University

6. Call for Concerted Action

The benefits of embedding EDI principles and values as essential components of research and innovation quality and social relevance include contributing to outcomes that improve the lives of diverse populations and enhancing the performance and success of enterprises.

To move forward in the pursuit of enhanced performance in research, innovation and business endeavours, we must ensure that full, equitable and inclusive participation of under-represented groups (including women, visible minorities, Indigenous peoples, people with diverse gender identities and people with disabilities) is integral to our plans and actions. Individuals, teams, departments, faculties and/or organizations are encouraged to adopt – at an individual or organizational level and through multi-sectoral collaborations – measures of EDI as indicators of:

- The progress they are committed to, and
- Their engagement in implementing GS11-recommended actions.

Making commitments is one thing. However, these commitments must be integrated into practices, and used to define, identify and measure success. Here are some **recommendations**:

1. Make the **Gender Summit 11 Declaration** list of actions your own and prominently publish your commitment to these actions, including timelines for their adoption.

2. Integrate the actions into your vision, mission, objectives, strategies, communications, leadership, training and mentoring activities.

3. Publish on a regular basis an update or an assessment of progress achieved.
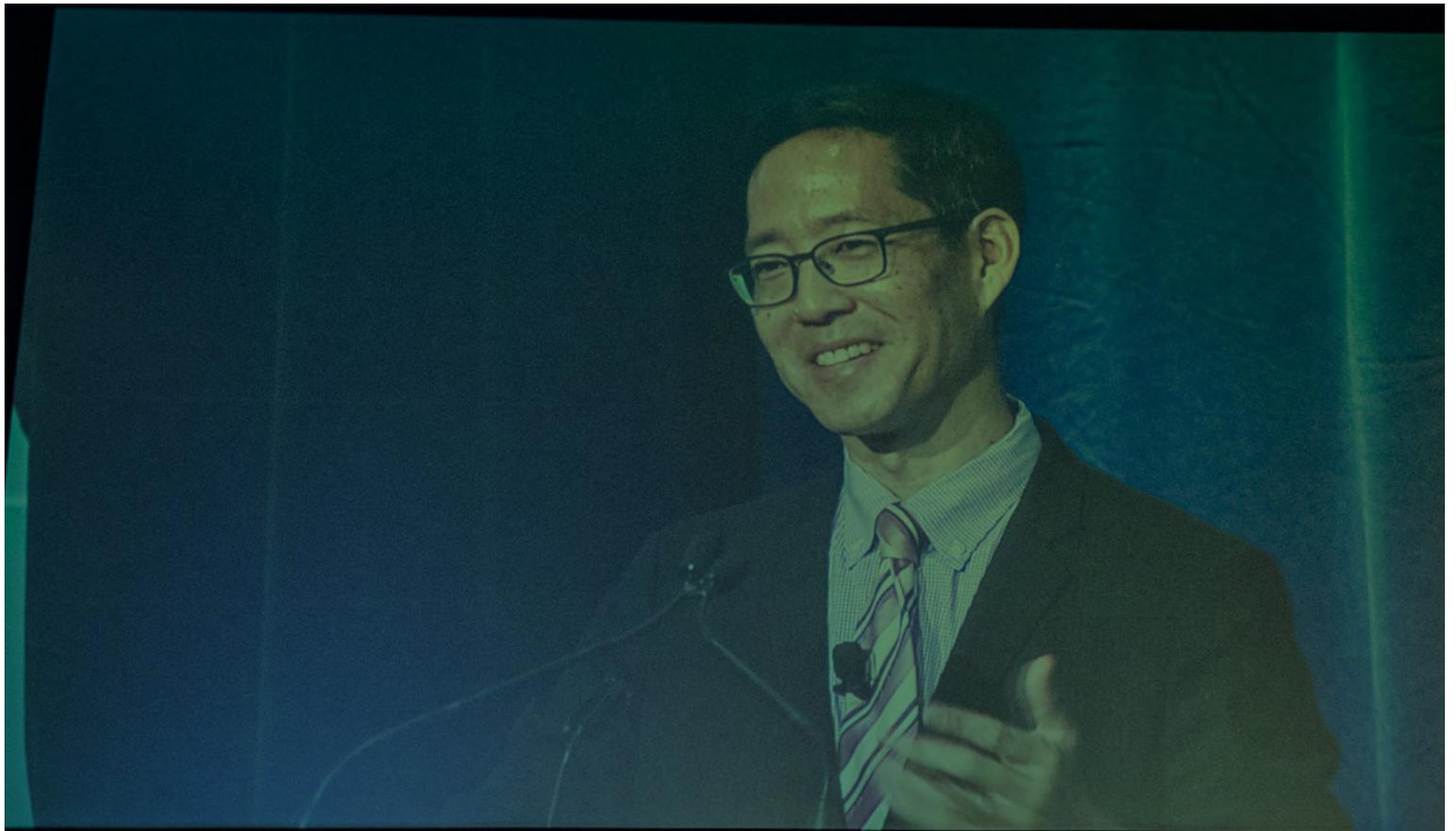
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