



## Assessment of institutional equity, diversity and inclusion action plan and progress report

### Instructions to reviewers

In this monitoring review exercise, panel members are asked to use the following principles:

- Meet institutions where they are on the learning curve. Some institutions are well-advanced in their efforts to implement equity, diversity and inclusion (EDI) considerations systemically, structurally and sustainably into their processes and policies. Others are in the early stages of implementing measures. It is important to recognize there will be a wide variance in terms of progress and that the goal is to encourage further growth, taking into consideration where they are in the process.
- Assist institutions in striving to improve the level of EDI in the management of their chair allocations. Support this goal with recommendations that would augment their efforts in a way that is both effective and achievable.

Panel members are asked to review each plan to assess whether:

- program requirements were met (as outlined in Appendix A);
- best practices are being implemented; and
- specific measures and/or actions can be recommended to bolster efforts.

Panel members are to provide a rating for each of the three criteria outlined in the evaluation grid on page 3 as well as an overall global rating. Members are asked to provide summary comments to explain their overall findings and ratings. **These comments will be shared with the institution.**

#### Conflict of Interest

Please inform the program as soon as possible if at any time you feel that you are unable to give an objective assessment of an institution's action plan and progress report (e.g., a conflict of interest). Contact the program at [edi-edi@chairs-chaire.gc.ca](mailto:edi-edi@chairs-chaire.gc.ca).

#### Protection of confidential information

The documentation entrusted to you by the Tri-agency Institutional Programs Secretariat (TIPS) may contain personal and confidential information. To prevent unauthorized access, it must be stored and handled in a secure manner at all times. When you no longer require the material, please destroy it in a secure manner (e.g., by deleting electronic files, shredding or burning paper or returning it to TIPS).

Material entrusted to you must be used only for the purposes of review and assessment, and may not be used for other purposes. Panel discussions must be treated as strictly confidential and must not be discussed or disclosed to anyone without prior approval from TIPS. If you need any additional information, please contact the program at [edi-edi@chairs-chaire.gc.ca](mailto:edi-edi@chairs-chaire.gc.ca). Do not contact the institution for additional information or clarifications.



## RATING SCALE

<b>E</b>	<b>Exceeds</b>	The effectiveness (or expected effectiveness) of the institution's actions/measures is <b>outstanding</b> . The institution has demonstrated exemplary integration of best practices related to equity, diversity and inclusion (EDI) when addressing this criterion. The institution can be seen as an exemplary leader in EDI in the management of its chair allocations.
<b>FS</b>	<b>Fully Satisfies</b>	The effectiveness (or expected effectiveness) of the institution's actions/measures is <b>very strong</b> . The institution demonstrated very strong integration of best practices related to equity, diversity and inclusion (EDI) into most aspects of addressing this criterion. The institution can be seen as a very strong leader in EDI in the management of its chair allocations.
<b>PS</b>	<b>Partially Satisfies</b>	The effectiveness (or expected effectiveness) of the institution's actions/measures is <b>strong in some respects</b> . The institution demonstrated a solid integration of best practices related to equity, diversity and inclusion. These were integrated into some aspects of addressing this criterion. Important elements are missing and/or unclear.
<b>DNS</b>	<b>Does Not Satisfy</b>	The effectiveness (or expected effectiveness) of the institution's actions/measures is <b>average</b> . The institution demonstrated average to poor integration of best practices related to equity, diversity and inclusion when addressing this criterion. Important elements are missing and/or unclear.



## Evaluation form

Institution name: \_\_\_\_\_

<b>A. Effectiveness of objectives, indicators and actions</b>	<b>Rating (see rating scale on page 2)</b>
<ul style="list-style-type: none"><li>• Are the objectives/actions identified in the action plan S.M.A.R.T.<sup>1</sup> and based on best practices?</li><li>• Will the institution's proposed measures/actions result in consideration of EDI systematically, structurally and sustainably?</li><li>• Does the institution have effective indicators for monitoring progress and course correcting, if necessary?</li></ul>	
<b>Written feedback</b>	

<sup>1</sup> Institutions were asked to develop objectives that were S.M.A.R.T.: specific, measurable, aligned with the wanted outcome, realistic and timely.



<b>B. Effectiveness of the analysis of the environment and data</b>	<b>Rating (see rating scale on page 2)</b>
<ul style="list-style-type: none"><li>• Has the institution undergone an effective self-reflection, resulting in identification of systemic barriers/issues, specifically through an employment systems review, comparative review and environmental scan?</li><li>• How strong is the link between the findings of these reviews and analyses and the action plan?</li><li>• Has progress been made towards addressing any systemic barriers or issues found in the analyses?</li></ul>	
<b>Written feedback</b>	



<b>C. Effectiveness of consultation/engagement</b>	<b>Rating (see rating scale on page 2)</b>
<ul style="list-style-type: none"><li>• Were the consultations and engagement undertaken when developing the plan significant and sufficient?</li><li>• Are there further consultations that should be taken to support further development and/or implementation of the plan?</li><li>• Do the policies and processes related to managing chair allocations, collecting equity and diversity data, and retention and inclusivity sufficiently consider EDI practices and principles and engagement with underrepresented groups?</li></ul>	
<b>Written feedback</b>	



<b>Institution's overall global rating</b> (see rating scale on page 2)	
<b>Other comments (if applicable)</b>	