

## Equity, Diversity and Inclusion Action Plan

### 1. Environmental scan

The Lady Davis Institute (LDI) is the research arm of the Jewish General Hospital (JGH) which is affiliated with the CIUSSS du Centre-Ouest-de-l'Île-de-Montréal (CCOMTL) and is also part of the McGill Integrated University Health Network (RUIS). The LDI is comprised of 220 scientists and 400 managers and support staff, located in various facilities. LDI scientists are appointed by McGill University and are subject to McGill rules for promotion, tenure and salary increases, but the LDI is involved in the selection of contract academic staff. Similarly, the LDI is not a legal entity and is under the authority of the CCOMTL for all matters related to administration, building management, health and safety, the computer network, as well as all policies and orientations that are transversal to the CCOMTL, of which EDI is a part. LDI management is autonomous in terms of the operational and financial management of the center and has its own human resources department, which is not always involved in the initial recruitment efforts made by the CIUSSS and the JGH, particularly with respect to clinical researchers. LDI scientists operate as parallel independent entities and are responsible for hiring and managing 80% of the staff. In addition, the LDI hosts and trains over 215 graduate students and 45 post-doctoral fellows per year from McGill and abroad.

#### **EDI issues and challenges at the Lady Davis Institute: Lack of shared understanding and expertise on EDI and lack of data within the LDI**

Prior to Spring 2022, the LDI had not initiated any collaborative EDI efforts or thinking within its structure or among research teams, except for the establishment in 2020 of a steering committee to ensure that EDI issues are considered in the administration of the Canadian Research Continuity Emergency Fund (CRCEF) in response to COVID-19. The historical lack of venues for discussion within the LDI on a variety of issues is part of the reason for this situation. In March 2021, the arrival of a new Executive Director, Dr. Stephen M. Robbins, provides a new direction for the LDI on several fronts, of which EDI is one. In March 2022, the EDI file was assigned to the newly hired Communications Manager, untrained in EDI. In the spring of 2022, the CIUSSS created and filled an EDI manager position, and an initiative is now under development. The existing manager, with previous EDI expertise, provides support to the LDI Communications Manager in the completion of his EDI-related duties. This same manager facilitated a presentation in late June on the basics of EDI for some LDI members at the request of the manager.

Given the lack of previous action, we have very little data to understand the specific strengths, issues, and challenges of EDI at the LDI. The only data we have is from an internal analysis conducted in 2022 by Josie Ursini-Siegel, Director of the Molecular Oncology Group in the Cancer Research Axis, with her own research team. This analysis identified some of the systemic barriers faced by equity-seeking groups, including under-representation in leadership positions; inadequate work/study/life balance measures; an emphasis on prizes and awards in funding competitions that particularly disadvantages international trainees; and tuition inequities between international and local trainees. These data are fragmentary, however, and point to the need to better understand the situation, barriers, and blind spots at the LDI in order to build a sustainable culture for EDI deployment. We have no choice at this point but to assume that the state of affairs as identified in the literature<sup>1</sup> applies to our research institute and to recognize that concerted efforts must be made to better understand not only EDI but also the implications of EDI in research.

The LDI and the JGH are located in the heart of the most ethnically, culturally, and socio-economically diverse neighbourhood in Montreal, allowing for the development of unique expertise. One of the four research axes of the LDI deals with the psychosocial aspects of illness and conducts studies on these vulnerable populations in order to inform health policies and reduce disparities in access to health care.

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<sup>1</sup> Canada, Statistics Canada, *Survey of Postsecondary Faculty and Researchers*, 2019.

## 2. Objectives and concrete actions

### a) Develop a common understanding within the Institute of what EDI is, and its implications for both the management of the center and for the research teams and the imperatives arising from it

At this time, EDI is not part of the conversations nurtured and shared by the research community within the LDI. As a result, it is safe to assume that the various individuals working within the Institute - regardless of their status or background - do not have a shared language or understanding of what IDE means or how it can be articulated within the governance structure or the development of research projects. To this end, the presentation given by the manager in charge of EDI to the CCOMTL last June highlighted this lack of common understanding of EDI at the LDI. The LDI seems to be in its infancy on the issue. In addition, the recent change in leadership allows for new engagement on the topic, as Dr. Robbins has experience and interest in the issue, having previously served on an EDI committee within the Canadian Institutes of Health Research (CIHR).

Initiatives	Actions	Leads	Indicators	Targets	Timeline
1. Update LDI's senior management, managers, and human resources staff knowledge about EDI	Develop and offer seminars and workshops on EDI in general, its principles and vocabulary	EDI Liaison Officer and CIUSSS DEIB Officer	<ul style="list-style-type: none"> <li>Number and diversity of training courses and participants</li> </ul>	Two mandatory awareness-raising or training activities in 2022-2023 for all senior executives and managers  100% of senior executives and managers trained	Winter 2022 – Fall 2023
	Develop a questionnaire to measure the level of satisfaction and understanding of seminar/workshop participants	EDI Committee and EDI Liaison Officer	<ul style="list-style-type: none"> <li>Knowledge of EDI vocabulary and best practices in human resources management by HR team and senior managers</li> <li>Satisfaction rate of participants in each training/workshop session</li> </ul>	Proportion (%) of HR policies and procedures updated and aligned with EDI practices  85%+ satisfaction rate with each training/workshop offered	Summer – Fall 2023
2. Educate LDI's staff and research teams on the basics of inclusive writing	Select and distribute an inclusive writing guide	EDI Committee and EDI Liaison Officer	<ul style="list-style-type: none"> <li>Inclusive writing guide</li> <li>Number of documents and communications revised</li> </ul>	The material is accessible and featured on the Web EDI page	Fall 2023 – Winter 2024
	Develop and offer training and awareness-raising activities on inclusive writing	EDI Liaison Officer	<ul style="list-style-type: none"> <li>Number of training courses and workshops</li> <li>Number of people reached</li> </ul>	At least one awareness-raising or training activity held or supported per year	Fall 2023 – Winter 2024

Initiatives	Actions	Leads	Indicators	Targets	Timeline
3. Develop programming for EDI awareness and training activities for the LDI research community	Develop and offer various training and awareness-raising activities on EDI in all facets of research	EDI Liaison Officer and CIUSSS DEIB Officer	<ul style="list-style-type: none"> <li>Type and number of training sessions</li> <li>Number of people reached</li> </ul>	At least one training course per year in 2023 and 2024	Fall 2023 – Winter 2024
	Develop a questionnaire to measure the level of satisfaction and understanding of participants	EDI Committee and EDI Liaison Officer	<ul style="list-style-type: none"> <li>Knowledge by all staff, managers, and research team members of FRQ's expectations regarding EDI for the LDI</li> <li>Satisfaction rate of participants in each training course/workshop</li> </ul>	85%+ satisfaction rate with each training/workshop offered	Fall 2023 – Winter 2024
4. Continuously disseminate internally relevant information related to EDI and EDI in research (Documentary watch)	Distribute the EDI Action Plan; create and distribute EDI information	EDI Committee and EDI Liaison Officer	<ul style="list-style-type: none"> <li>Number of documents drafted, validated and distributed</li> <li>Number of downloads of online documents</li> <li>Number of times the documents were consulted online</li> </ul>	<p>Corporate and key messages created and integrated into each EDI news item</p> <p>Minimum of 12 news items per year</p> <p>Bimonthly newsletter (1 news item per newsletter)</p> <p>Sending out an email to all staff, managers and research team members informing them of the existence of this action plan and its contents</p>	Ongoing
	Create and maintain a section of the LDI website on EDI, enabling the continuous dissemination of information	EDI Liaison Officer	<ul style="list-style-type: none"> <li>EDI Web section created</li> <li>Number of information disseminated</li> </ul>	<p>EDI Web section created</p> <p>Minimum of 12 additions per year</p>	Ongoing
5. Build a database of information on EDI and EDI in research	Provide resources and documents on EDI and EDI in research to all LDI stakeholders (researchers, committees, trainees, employees)	EDI Committee and EDI Liaison Officer	<ul style="list-style-type: none"> <li>Number of resources in the database</li> <li>Number of downloads of online documents</li> <li>Number of consultations of online documents</li> </ul>	The resources are accessible and featured on the Web EDI page	Ongoing

**b) Establish a structure to guide the Institute's next steps in EDI**

In addition to the current LDI governance structure more traditionally associated with the operational management of the Institute, the need to work in a collaborative manner inherent to the EDI approach requires the establishment of a participatory structure, open to any member of the community, in order to reflect on, coordinate, deploy and underpin EDI-related actions within the LDI. The new director of the center wishes to federate the efforts within the Institute so that EDI is carried by the management, but also by the whole community. The LDI will therefore set up a structure to collectively advance the initial work to arrive at a thorough understanding of the situation at the LDI as it relates to EDI. This new structure will support the development of an organizational culture that fully supports equity, diversity, and inclusion.

Initiatives	Actions	Leads	Indicators	Targets	Timeline
1. Open call to all within the LDI community to form an advisory committee with a broad mandate to guide future EDI actions for the LDI	Posters on LDI message boards Announcement on LDI's two broadcast screens Mass emails	EDI Liaison Officer	<ul style="list-style-type: none"> <li>Number of people who expressed interest and applied</li> </ul>	Minimum of 20 applications	Fall 2022
	Reference document describing the status, composition, mandate, member responsibilities and key terms and conditions of the LDI EDI Advisory Committee	EDI Liaison Officer and CIUSSS DEIB Officer	<ul style="list-style-type: none"> <li>Committee presentation document: committee mandates and member responsibilities as well as meeting procedures</li> </ul>	Bilingual document available and distributed to the entire LDI research community	Fall 2022
	Online survey to gather demographic data, determine their level of interest and knowledge of EDI, and their willingness to join the committee	EDI Liaison Officer and CIUSSS DEIB Officer	<ul style="list-style-type: none"> <li>Number of respondents to the survey</li> </ul>	100% of people who expressed interest	Fall 2022
2. Develop a matrix for analyzing applications	Development of a matrix for analyzing candidacies	EDI Liaison Officer and CIUSSS DEIB Officer	<ul style="list-style-type: none"> <li>Matrix developed</li> </ul>	Adopting the matrix and using it to interview candidates	Fall 2022
	Interviewing candidates in person or virtually with the matrix	EDI Liaison Officer	<ul style="list-style-type: none"> <li>Number of people interviewed</li> </ul>	100% of respondents to the survey	Fall 2022

Initiatives	Actions	Leads	Indicators	Targets	Timeline
3. Analysis of applications and selection of candidates	Analysis of candidates' responses to the interview and online survey, and selection based on the matrix	EDI Liaison Officer and LDI upper management	<ul style="list-style-type: none"> <li>Number of people who applied for the EDI Advisory Board</li> <li>Diversity of people selected to serve on the committee (socio-demographic and professional)</li> </ul>	<p>The EDI Advisory Committee is made up, taking into account the need to have a diverse group of members</p> <p>10 people selected to sit on the committee</p>	Fall 2022
4. Launching and holding of committee meetings	EDI Advisory Committee created and work begins	EDI Committee	<ul style="list-style-type: none"> <li>Schedule of committee meetings (minimum of 8 per year)</li> <li>Agendas and minutes of meetings</li> </ul>	Minimum of 8 meetings per year	Fall 2022 and ongoing
5. Identification by committee members of specific mandates to be undertaken	Establishment and implementation of an EDI data collection strategy at the LDI (surveys)	EDI Committee	<ul style="list-style-type: none"> <li>Number of respondents to the survey(s)</li> </ul>	Implementation of an annual and multi-year EDI data collection strategy	Spring 2023 and ongoing
	Identification of the main obstacles and areas to be addressed, and prioritization of actions to be taken	EDI Committee	<ul style="list-style-type: none"> <li>Report showing the obstacles to EDI at the LDI and the plans to overcome them</li> </ul>	Development, dissemination and implementation of an action plan, including objectives, activities, indicators, people responsible and targets	Winter 2024 and ongoing
	Formulation of written recommendations to LDI management	EDI Committee	<ul style="list-style-type: none"> <li>Number of recommendations made</li> </ul>	Written report submitted to LDI senior management	Winter 2024 and ongoing
	Development and implementation of a communications plan to keep the LDI community informed of ongoing work and initiatives.	EDI Committee	<ul style="list-style-type: none"> <li>Quantity of communications material produced to describe the work of the LDI and its EDI Advisory Committee</li> </ul>	Developing and implementing a communication plan	Winter 2024 and ongoing

**c) Conduct an environmental scan of the LDI to identify clear EDI priorities within the institute for the fall of 2024**

The LDI must prepare to address and consider EDI more thoroughly within its community. To that end, the LDI must conduct an analysis of its current environment. The LDI will develop mechanisms to ensure the collection, analysis and tracking of data necessary to produce a reliable and realistic picture of the diversity, barriers and issues related to EDI that we will need to prioritize within the LDI community. This in turn will lead to the establishment of a future action plan focused on advancing transformative EDI goals for the LDI; both in relation to LDI governance and the development of the Institute's research projects.

Initiatives	Actions	Leads	Indicators	Targets	Timeline
1. Review the literature to identify challenges and opportunities related to EDI within the LDI	Literature review	EDI Committee	<ul style="list-style-type: none"> <li>Various documentation collected in relation to the environmental scan (computerized file)</li> </ul>	Analysis completed and opportunities identified	Fall 2022 and ongoing
2. Identify best practices in EDI and data collection from similar institutes or research centers to the LDI	Survey and analysis of EDI best practices in research centers	EDI Committee	<ul style="list-style-type: none"> <li>Various documentation collected in relation to EDI best practices</li> <li>Number of sources used</li> </ul>	Analysis completed and selection of best practices for our collection tools	Fall 2022 and ongoing
3. Establish the data collection approach to be used within the LDI	Develop a data collection plan	EDI Committee	<ul style="list-style-type: none"> <li>Presence of a data collection plan</li> </ul>	Annual and multi-year data collection plan, based on identified best practices	Summer and fall 2023
4. Select and prepare the tools for data collection	Establish and prepare data collection tools	EDI Committee	<ul style="list-style-type: none"> <li>Development of data collection tools</li> </ul>	Bilingual surveys available in multiple formats for inclusion (e.g., online, email or print, large print, Braille)	Summer and Fall 2023
5. Conduct data collection with all people working or conducting research at the LDI	Distribute data collection tools	EDI Liaison Officer	<ul style="list-style-type: none"> <li>Number of people who completed the data collection tools</li> </ul>	Response rate of 30% or more	Winter 2023 - Spring 2024
6. Analyze the results	Analyze and format collected data	EDI Liaison Officer and external firm to be determined	<ul style="list-style-type: none"> <li>Report on the results (quantitative and qualitative)</li> </ul>	Written report presented and made available to the entire LDI research community	Spring and Summer 2024
7. Identify the priorities related to the deployment of EDI within the Institute	Setting new priorities based on data collection results	EDI Committee	<ul style="list-style-type: none"> <li>Report presenting the analysis of the results and identification of future priorities</li> </ul>	List of priorities that will form the basis of the LDI's next EDI action plan	Winter 2024