

CFREF EDI Community of Practice

Summary report – the CFREF Equity, Diversity and Inclusion Action Plan Reflection Questionnaire

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Preamble

This report presents the key findings from an anonymous questionnaire conducted for assessment purposes within the CFREF Equity, Diversity, and Inclusion (EDI) Community of Practice (COP). The findings are intended to be shared with attendees of the EDI COP session at the 2025 CFREF Symposium.

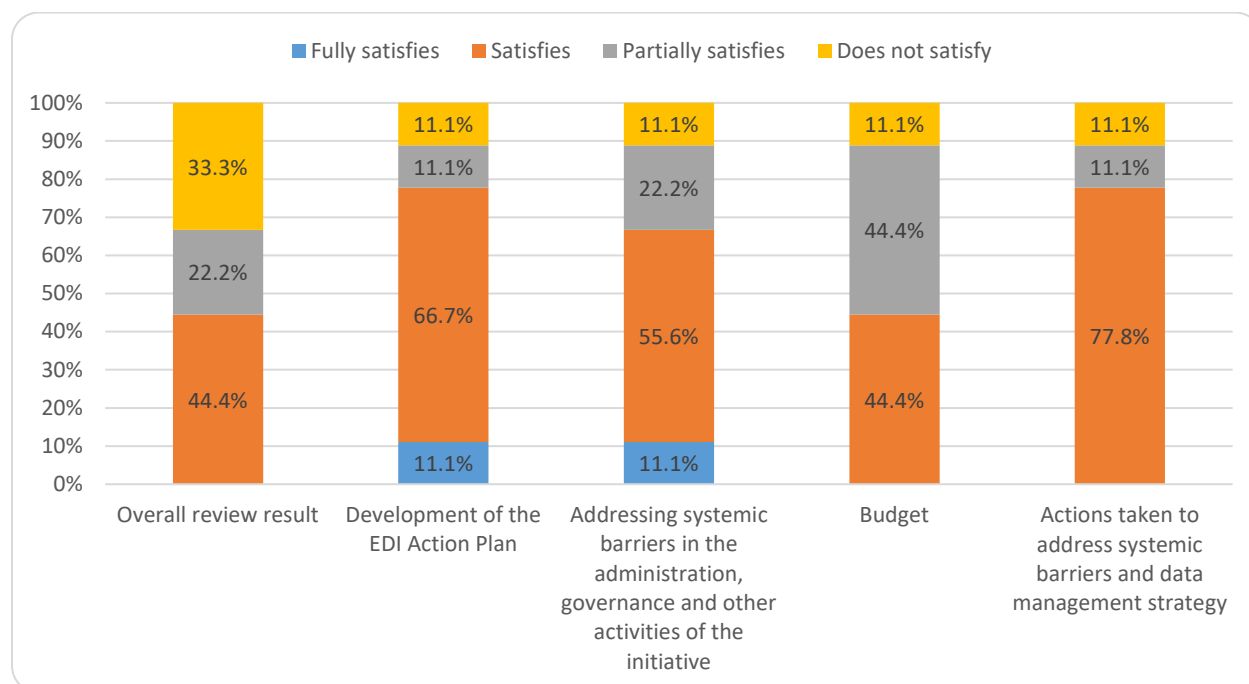
Over a period of more than 12 months beginning in the summer of 2023, 11 initiatives from the 2022 competition engaged in the development of their respective EDI Action Plans, guided by the instructions provided by the CFREF program. Monthly COP meetings facilitated discussions among participants, enabling the exchange of strategies to address common challenges encountered during the planning phase. Following the submission of the action plans, the focus of these meetings shifted toward implementation and the identification of best practices.

In preparation for the 2025 CFREF Symposium, all 11 initiatives were invited to complete a questionnaire comprising eight questions. The purpose of the questionnaire was to gather insights regarding the review outcomes of the EDI Action Plans, participants' experiences with challenges, current progress on implementation, and recommendations for CFREF program administrators and future award recipients.

[Appendix A](#) offers the complete questionnaire results.

Key findings

EDI Action Plan Review Results



Among all the responded CFREF initiatives, the EDI Action Plan review results are observed as follows:

Overall review result

- No initiative received “Fully satisfies” in the overall review result.
 - Over 20% of initiatives received “Partially satisfies” and over 30% received “Does not satisfy” - over 50% of the initiatives were requested to submit a response to provide additional information to CFREF

Budget

- In the “Budget” category, more than half of the initiatives received “Partially satisfies” or “Does not satisfy”

Development of EDI Action Plan & Addressing systemic barriers in the administration, governance and other activities of the initiatives

- 11% of the respondents received “Fully satisfies” in two categories – “Development of the EDI Action Plan” and “Addressing systemic barriers in the administration, governance and other activities of the initiatives”
- Nearly 80% the initiatives received “Satisfies” or “Fully satisfies” in two categories: “Development of the EDI Action Plan” and “Actions taken to address systemic barriers and data management strategy”

As for the clarity of the review comments, the responses were divided equally in three ways; “extremely clearly/very clearly,” “somewhat clearly” and “not so clearly/not at all clearly”. Some respondents offered additional comments as below:

- The evaluation lacked clarity and consistency, with an unexplained overall negative rating despite mostly positive scores.
- Feedback was vague and insufficient for guiding necessary improvements before the midterm review.
- While key areas for improvement were identified—such as addressing intersectionality, equitable workload, and SMART goals—there were also inconsistencies between the committee’s summary and earlier discussions with TIPS, particularly around budget and EDI strategies.

Challenges and barriers in the EDI Action Plan development

The respondents identified several challenges, including balancing meaningful engagement with underrepresented groups —especially Indigenous Peoples—while avoiding overburdening the groups, and navigating the complexities of working across multiple institutions with differing structures and resources. Completing the literature review was time-consuming and difficult to conduct comprehensively due to space limitations. Additional obstacles identified included the tight timeline between feedback and the midterm review, recruiting a qualified EDI lead, securing leadership and researcher buy-in, and building relationships with underrepresented communities.

To manage the above-mentioned challenges, the respondents implemented the following approaches.

- Leveraged existing institutional efforts to reduce burden, though reviewers noted the need for more new relationships and diverse participation.
- Conducted regular EDI committee meetings to maintain momentum
- Facilitated "meet & greet" sessions with institutions to foster researcher engagement.
- Despite challenges with the literature review, it was reviewed by multiple committees, and the team has committed to updating it every two years to ensure relevance and improvement.

Key factors in the timely and meaningful development of the plan

Strong leadership commitment, regular EDI Committee meetings, and a dedicated Senior EDI Advisor supported progress were noted as key factors in the timely development of the plan. Notably, attendance (to committee meetings) was occasionally below expected levels. Collaboration across CFREF colleagues, faculty, trainees, and equity staff helped share the workload. Early support from a diverse team—not just EDI specialists—was key to developing a comprehensive submission. Future action plans should explicitly require such team-based efforts.

If starting a new EDI action plan development...

The respondents suggested creating separate strategies for EDI-Research Practice (RP), EDI-Research Design (RD), and Indigenous engagement. The respondents also shared they would seek more institutional support beyond the CFREF project, including adding consultation with external underrepresented groups. They would also engage leadership earlier to increase their ownership but felt no major changes were needed due to a satisfactory evaluation.

Current implementation/completion status

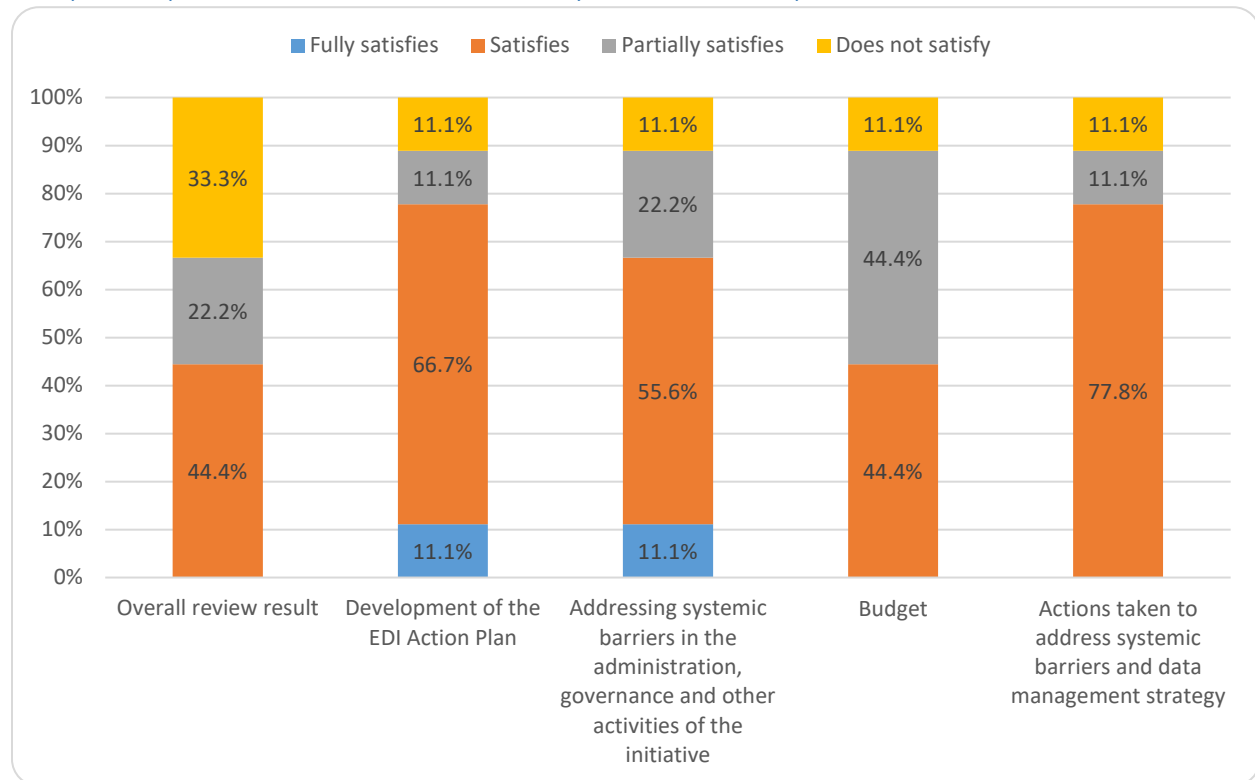
50% of the respondents rated their implementation/completion status as “slightly behind the schedule” while 25% commented they were “on schedule as proposed.” The respondents noted that some actions are progressing well, but other actions are delayed or on hold due to staffing vacancies, including key EDI and operations roles.

Sharing additional comments on the EDI Action Plan development and implementation with their peers, future CFREF initiatives, and the CFREF program administrators

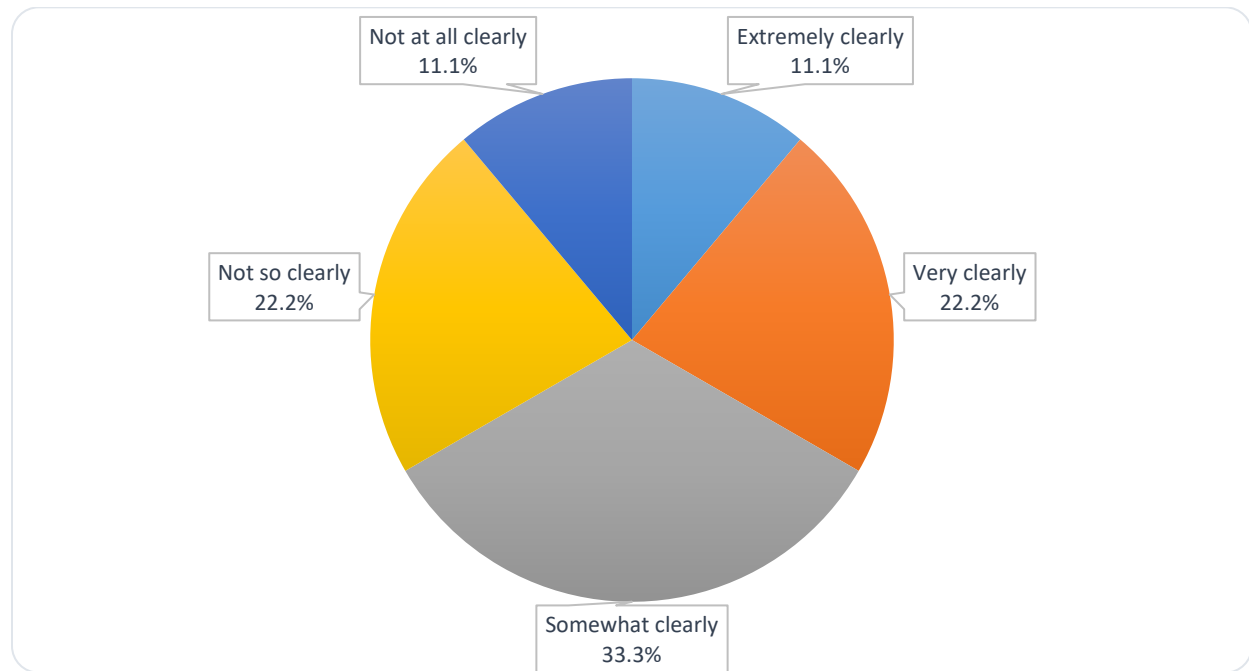
The respondents noted that the plan should remain flexible and be treated as a living document, as its current template is too rigid and caused challenges, especially around Indigenous research engagement. Recruiting qualified personnel and building strong collaborations are essential, alongside access to best-practice models to guide implementation. Support for faculty and staff—through compensation for EDI-related work and learning—would improve ownership and reduce barriers. Additionally, guidance on addressing broader institutional barriers, like healthcare inclusivity, would be helpful.

Appendix A. Questionnaire Results

Q1: please provide the review results of your EDI action plan.



Q2: Based on the committee discussion summary and the evaluation sheets from the reviewers, what was the level of clarity did you gain in terms of how the plan was evaluated?



If possible, please elaborate your response here.

- There is no alignment in receiving 3 'satisfies' and 1 'partially satisfies' then receiving an overall 'does not satisfy'. The evaluation and decisions were not explained well.
- The feedback was somewhat brief and vague -- since the CFREF initiatives are expected to address/implement this feedback by the midterm review, more specific, concrete feedback would have been helpful. Given the review timelines, more comprehensive comments would have been appreciated.
- The areas of improvement are very clearly indicated for us such as addressing intersectionality, engaging more with partner organizations, making sure that the labour does not disproportionately fall on EDGs, having SMART goals, etc.
- There were several points raised in the committee discussion summary that were not clear or not in alignment with the initial discussion with the TIPS members. (budget, strategically incorporate existing EDI initiatives...etc.)

Q3 In your EDI Action Plan development, did you experience any challenges or barriers which you believe should be shared with the CFREF program as well as future CFREF recipients? Please elaborate.

- There was some discussion/disagreement about how much new co-creation and engagement with under-represented groups (including Indigenous Peoples) should be undertaken --how to avoid over-burdening people but also invite them into the process. Working across multiple institutions was also challenging (different communities, existing resources, policies, structures, etc.) The literature review was quite time consuming.
- I think that having the midterm review one year after receiving feedback makes our work very challenging. It is a lot to accomplish and adjust in such a short time frame. Feasible, but stressful.
- Recruiting an eligible individual for the EDI role
- Obtaining buy-in and genuine engagement from leaders as well as participating researchers
- Developing working relationships with various underrepresented groups
- The literature review was laborious to complete, and upon review by the EDI Committee were told "it is a snapshot of hardships, but there's no space to provide any detail," made it really difficult to be comprehensive with the experience of underrepresented scholars in research and upon submission of the plan, still felt it could have been further developed, refined, and perhaps expanded.

Q4: Follow-up to Q3, can you provide an example of how your initiative overcame one of the identified barriers?

- We decided to leverage previous institutional engagements to minimize the burden. This approach provided useful data, but the reviewers noted that there could have been more development of new relationships and co-creation opportunities, and there needs to be assurance of diverse representation and participation. An existing staff member had time set aside to work on the literature review (and development of the Action Plan).
- By having an EDI committee that meet once a month, we can get our EDI actions validated very quickly, that helps us to move as fast and smoothly as possible.

- To gain buy-ins from researchers, the EDI officer held a series of "meet & greet" meetings with participating institutions. This resulted in a number of follow-up conversations with the researchers and the research admin staff at each partner institution.
- After review of the literature review by the EDI committee, leadership committee, board of directors and Directorate we felt "ok" with submitting the plan. As part of our response to feedback, we have decided to complete a literature review every 2 years to ensure our program's practices are as up to date as possible.

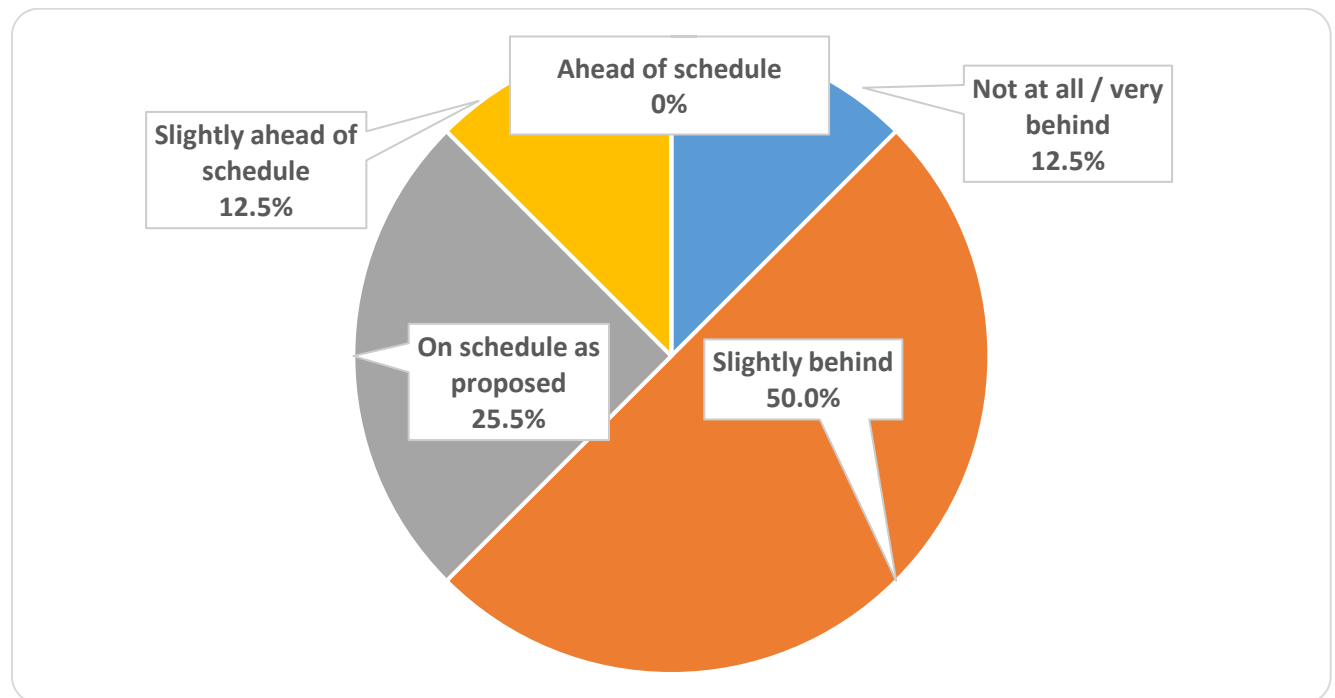
Q5: In your EDI Action Plan development, what helped the timely and meaningful development of the plan?

- Leadership commitment
- Monthly meetings of the EDI Committee (although attendance sometimes proved challenging). The Chair of the EDI Committee is a senior official who also sits on the Board (highest-level committee for the CFREF initiative) Identifying designated staff lead and having time set aside for this work
- On top of having our EDI committee as a governance body, having a full time dedicated Senior EDI Advisor helps. Also the support and collaboration of the colleagues within our CFREF initiative, professors, trainees and staff from the institutional Equity Team helps to share the work and have broader impact.
- Before we hired the EDI officer, we hired a grad student to help the literature review, which was a big time saver and the student did an amazing job.
- Having a team (not just EDI specialists) working on the grant helped ensure all aspects of the program would be included in the final submission. Also the amount of labour required to complete the report, it should be an explicit instructions that a team (made up of EDI and non-EDI specialists) should be assembled to develop any future action plans.

Q6: If you were to start a whole new EDI action plan development process, what would you do differently knowing what you know now?

- Have three separate strategies (and maybe subcommittees) for EDI-RP actions, EDI-RD actions, and Indigenous co-design/engagement
- I would seek for more institutional support rather than trying to do this on a CFREF project scale
- We do not think we would have done anything differently as we had a satisfactory evaluation.
- We would add steps to consult with external groups representing underrepresented voices.
- Having earlier conversations with leadership to shape the direction of the plan, and to help them have increased ownership over the initiatives listed throughout the plan.

Q7: Please indicate your implementation and completion status of the proposed actions to date.



If possible, please elaborate your response here.

- Some actions have been effectively implemented/piloted and are in their second year, but others (including actions some related to mentorship) are slightly behind schedule. There is some challenge in implementing multiple actions involving multiple leads/audiences simultaneously.
- We are mainly behind in actions concerning Indigenous Research as we still were not able to hire a human resource for that despite multiple job postings.
- The EDI officer position and the Director of Operation's position are both vacant at this time. The initiative is starting the hiring processes for both positions soon. Major initiatives are currently on hold until these position are filled.
- Several smaller initiatives have been launched, but only around 50% of our hallmark initiatives from Action Plan Table B have been initiated.

Q8: Is there anything else you would like to share with your peers, future CFREF initiatives and the CFREF program administrators in terms of your experience with the EDI action plan development?

- While there is room for adjustments during implementation, the plan should be treated as a living document. It's too comprehensive to finalize entirely before the project begins.
- The template was very prescriptive and rigid -- it would be great to see some flexibility in the future. The inclusion of Indigenous research in the EDI plan was not ideal and led to some confusion/misunderstanding and some challenges for the committee (need for engagement with Indigenous researchers and bodies without speaking for those researchers and communities)

- Focus on recruiting qualified personnel for managing EDI initiatives while building connections to key collaborators within the initiative and beyond.
- It would be beneficial to have models of successful implementation to follow, best practices are constantly being shared and it would be better to have these readily available than to have 10 different programs review how to embed EDI best practices into their programs. Additionally, a lot of the work to implement the plan comes from staff support rather than Faculty (they're quite busy this makes sense), it would be great if CFREF could provide means of paying faculty for their EDI consultation services developing an EDI action plan as it gives them more responsibility, ownership, and accountability over the program's EDI outcomes. It would also be great if CFREF could provide staff with some ability to be compensated or reimbursed for any additional learning, as it stands this must come out of pocket and is a significant barrier to learning EDI better practices.
- Institutional barriers, such as the absence of inclusive healthcare plans for conditions not covered by provincial health programs, may fall beyond the scope of the action plan. Guidance on addressing these barriers would be valuable.