PI PERIMETER INSTITUTE

Strategic Plan for Equity, Diversity and Inclusion (EDI)

Land Acknowledgement

In the spirit of understanding and learning from what has come before, Perimeter respectfully acknowledges that it is located on the traditional territory of the Attawandaron, Anishnaabeg, and Haudenosaunee peoples. In particular, we acknowledge that the Institute is located on the Haldimand Tract, land promised to the Six Nations of the Grand River and the Mississaugas of the Credit First Nation, which includes six miles on each side of the Grand River.

As settlers, we thank all the generations of people who have taken care of this land for thousands of years. We commit collectively to making the promise and the challenge of Truth and Reconciliation real in our community.

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Director's Introduction

Welcome to Perimeter Institute's first Strategic Plan for Equity, Diversity and Inclusion (EDI).

Over the last decade, there have been many Perimeter efforts in the realm of EDI, and they have unquestionably enhanced the Institute's culture. Paradoxically, some of these efforts have illuminated areas where we can do more, and there are still others to be addressed.

In Perimeter's short life, we've built a unique institution, with a culture characterized by intellectual fearlessness and excellence. Yet we can do even better. Our culture is connected to our research. We're here to make breakthroughs in our understanding of our universe – and breakthroughs are made by thinking in new ways. We can't afford to leave any great thinkers, or any great ideas, behind.

In 2020, we embarked on a project to develop a coherent, concrete strategic plan to guide Perimeter's efforts in EDI, in partnership with experts at Shift Health and the Laurier Centre for Women in Science. All members of the Perimeter community have been consulted to ensure that the final strategy is reflective of our whole community.

This document is not our last word on EDI as an institute, nor our first. But this is a step in an intentional and comprehensive effort to make Perimeter an institute where everyone can thrive and find a sense of belonging.

> — Robert Myers, Director and BMO Financial Group
> Isaac Newton Chair in Theoretical Physics

Introduction

Perimeter Institute (PI) aspires to be the world's foremost centre for theoretical physics research, training, and outreach, aiming to achieve breakthroughs that will transform our collective future.[1]

Since its founding, PI has been an innovator, aiming to create an exceptional place in which breakthroughs are not only possible, but likely.

Achieving PI's mission requires the members of its community to create a culture of curiosity, collaboration, and innovation, with the courage to tackle exceptionally difficult challenges. Equity, Diversity and Inclusion (EDI), which includes accessibility, are integral to creating and sustaining such a culture. (See Glossary of Terms for working definitions.)

Yet imbalances persist, both in physics generally and here at Perimeter. Diversity declines along the academic career path in many STEM fields;[2] the decline is especially pronounced in physics.[3]

With this inaugural Strategic EDI Plan, PI affirms its commitment to the principles of equity, diversity and inclusion. We build on the solid foundations we have already established, outlining strategic objectives, associated activities, and measures by which we can gauge progress.

Plan Overview

Mission

To empower a Perimeter community in which everyone can contribute fully to our work and culture, to our scientific advances, and to the future of physics by making EDI a shared commitment and responsibility.

Overarching Goals

Through this strategic plan, we aim to:

- Build a culture where everyone can contribute fully to PI's mission
- Promote shared responsibility for EDI across the whole PI community
- Support the development of a diverse pipeline of future physicists
- Set an example that inspires change within the broader physics community

We expect that achieving these goals will enhance PI's culture overall, helping us attract and retain outstanding researchers, students, and staff from a wide range of backgrounds and increasing career satisfaction. This, in turn, will enhance PI's research, training, and outreach. We hope that our successes and lessons learned inspire wider positive change in the international research community.

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[1] PI vision: "To create the world's foremost centre for research, graduate training, and educational outreach in theoretical physics, uniting public and private partners, and the world's best scientific minds, in a shared enterprise to achieve breakthroughs that will transform our future."

[2] https://www.univcan.ca/media-room/publications/equity-diversity-and-inclusion-at-canadian-universities-report-on-the-2019-survey/

[3] https://www.canphyscounts.ca/

Focus Areas

Achieving these overarching goals will require concerted and focused efforts across the PI community. Based on input and insights from the whole PI community, this first Strategic EDI Plan outlines five focus areas where we will seek to advance EDI at the Institute:

1. **EDI knowledge and competencies** – facilitate continual learning to develop EDI knowledge and skill sets among all members of the PI community
2. **Culture and environment** – foster shared responsibility for EDI among researchers, students, and staff at PI to build a culture where everyone can contribute fully
3. **Governance and leadership** – embed EDI within PI's leadership culture, organizational policies, practices, and decision-making processes
4. **Recruitment and talent development** – attract, support, and retain a diverse pool of students, staff, and researchers
5. **Research** – maximize the potential for scientific breakthroughs based on a foundation of diversity and inclusion

Each focus area outlines objectives, key activities, and measures by which we can gauge progress toward the plan's goals. A high-level implementation roadmap accompanies this plan, giving a concrete framework, timelines, and resource allocations for key activities.

PI Context and Current Situation

Perimeter has always recognized the need for diverse perspectives and approaches to achieve our mission of producing breakthroughs. Our international research community and the broad networks the Institute has established speak to this principle. Further, in line with this perspective, several long-standing programs have sought to advance EDI at Perimeter and in the field more broadly:

- **Our educational outreach programs** connect with many individuals from underrepresented groups, supporting teachers and students in STEM.
- **The Perimeter Scholars International (PSI) master's program**[4] attracts a highly diverse and nearly gender-balanced cohort of outstanding students.
- **PI's Emmy Noether Initiatives,** including the Simons Emmy Noether Fellowships and conferences, have enhanced scientific careers and promoted networks among women scientists.
- **Our science communication** efforts regularly recognize the contributions of groups that are traditionally underrepresented in physics and STEM, for example the "Forces of Nature" poster collection, which celebrates the contributions of renowned women scientists.

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[4] From 2009 to 2017, the balance of incoming master's students was 70% male to 30% female (191 to 83). Since 2018, this ratio increased significantly; 52% of the incoming 2022/23 class is female.

- **In 2019, PI signed Canada's Dimensions Charter**, which aims to "foster increased research excellence, innovation and creativity within the post-secondary sector across all disciplines, through greater equity, diversity and inclusion (EDI)."[5]

The Inclusive PI Platform

Perimeter also has a wide-ranging suite of in-house EDI efforts. Founded in 2018, the Inclusive PI Platform (the Platform) is a volunteer-led initiative composed of working groups of students, postdocs, faculty, and staff tackling EDI issues at PI. Their mission is to create the best possible work, research, and living environment for everyone at PI and to allow for maximal participation of all in the process.

All PI residents are welcome to join the Platform, and involvement is high. As of spring 2022, there were 10 working groups[6] and two programs with a total of 60 members, meaning that approximately 20 percent of PI's *entire community* is involved in the Platform. And it has been highly successful at effecting change through many focused, creative actions. A few examples of Platform-led initiatives include:

- **Revision of policies** relating to bullying, harassment, and sexual assault
- **Improved maternity and parental leave policies** for researchers, students, and staff
- **In-house mental health supports that are widely used** by members of the PI community
- **A new mentorship program** for PhD students
- **Allyship and community building** through the work of the 2SLGBTQ+ Working Group, including many events that have been well attended by members of the PI community
- **Publication of articles, stories, and multimedia pieces** that have led to greater understanding of barriers faced by women scientists

Where We Stand Now

While the Institute can be proud of these efforts, there is still a long way to go on many fronts. For example, there is a striking gender imbalance in PI's faculty – as of spring 2022, the percentage of women among the full-time faculty is 12.5 percent; among the associate (part-time) research faculty it is 9.5 percent. A 2018 survey of researchers and students at PI also showed that women's sense of inclusion and support was lower than men's.

The intent of this plan is to build on existing activities and strengths and to remedy shortcomings in order to fully embed EDI into PI's culture.

How This Plan Was Developed

People from all parts of PI's community contributed to this plan. In 2020, PI's Director Rob Myers launched a project to develop the Institute's first Strategic EDI Plan to set out goals and guide the Institute's efforts

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[5] https://www.nserc-crsng.gc.ca/InterAgency-Interorganismes/EDI-EDI/Dimensions-Charter_Dimensions-Charte_eng.asp.

[6] The 2022 working groups are 2SLGBTQ+, Accessibility, Anti-Racism, Climate Change, Community and Communication, Mental Health, Parental Policies, Respectful Environment, Seminars, and Women in Physics; the two programs are the Allyship program and the In-House Mental Health program.

going forward. The plan complements (and forms part of) the Institute's overall seven-year plan for 2022–2029.
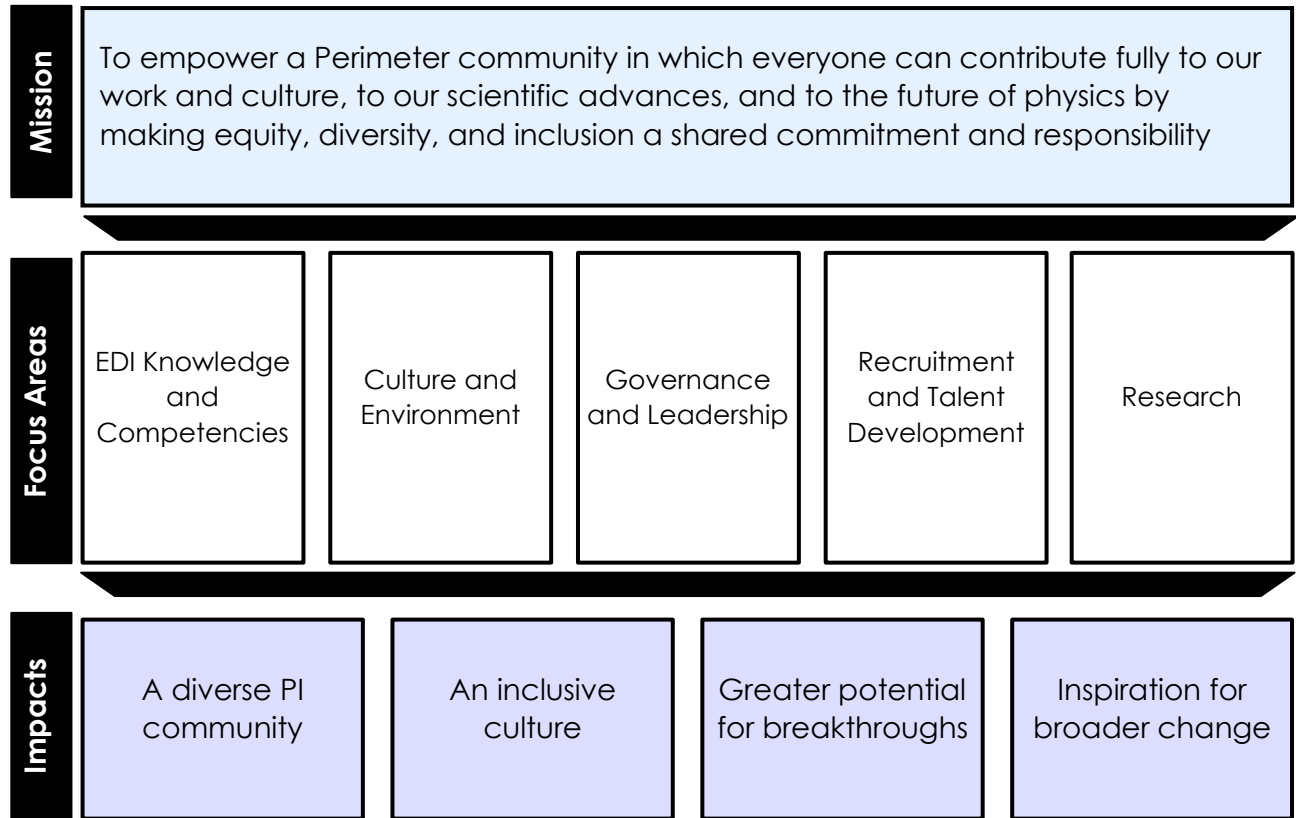
The development of the plan proceeded in several stages:

- **Project oversight:** PI engaged Shift Health and the Laurier Centre for Women in Science to provide expert guidance, gather anonymized data from the community, and make recommendations. The EDI Strategy Project Team (ESPT), composed of PI leadership, researchers, administrative staff, students, and individuals from the Inclusive PI Platform, was created to facilitate the development of this plan.[7]
- **Landscape assessment:** The Laurier Centre for Women in Science conducted a confidential survey of the PI community, canvassing key issues, challenges, barriers, and strengths relevant to EDI at PI. Shift Health held consultations with 43 members of PI's community, reviewed benchmark organizations, and consulted with external experts on best practices in similar organizations. Their findings were presented to the PI community in September 2021.
- **Draft plan development:** Shift Health developed a draft plan in consultation with members of the ESPT and PI leaders; it was presented to the ESPT in December 2021.
- **Strategic plan review:** The ESPT refined the plan and adjusted it to Perimeter's priorities and needs throughout winter/spring 2021/22.
- **Faculty and senior staff retreat:** The draft plan was discussed at a retreat in March 2022 to get further feedback from the leaders in the Perimeter community.
- **Finalization:** PI's Strategic EDI Plan was finalized in late spring of 2022.

Future Outlook

Perimeter's culture and the field of EDI itself are dynamic. Therefore, we expect that this plan will be a living document, which may be modified as circumstances warrant. We believe that a key to the success of this plan will be to approach EDI-related activities with an experimental mindset. That is, we will collect and analyze data on PI's EDI climate and demographics at regular intervals, adjusting activities if appropriate. We will also remain open to developments in the wider world of EDI (see sections 1.3 and Implementation Considerations). Through listening, learning, trying, and adapting, we will grow as an institution and as a scientific community.

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[7] ESPT members: Rob Myers (PI Director), Michael Duschenes (previous COO), Paul Smith (current COO), Bianca Dittrich (faculty & Inclusive PI Platform co-chair), Maïté Dupuis (Director of Academic Programs & Inclusive PI Platform co-chair), Natasha Waxman (Director of Publications, Grants and Awards & Inclusive PI Platform co-chair), Cliff Burgess (associate faculty), Patricia Butler (Director of People and Culture), Anna Heffernan (associate postdoctoral researcher), LeeAnne Kane (Manager, COO office), Lei Gioia Yang (PhD student).

EDI Strategy at a Glance

Mission

To empower a Perimeter community in which everyone can contribute fully to our work and culture, to our scientific advances, and to the future of physics by making equity, diversity, and inclusion a shared commitment and responsibility

Focus Areas

EDI Knowledge and Competencies	Culture and Environment	Governance and Leadership	Recruitment and Talent Development	Research

Impacts

A diverse PI community	An inclusive culture	Greater potential for breakthroughs	Inspiration for broader change

Focus Area 1: EDI Knowledge and Competencies

1.1 Context

Building EDI knowledge and competencies across PI's community will create a foundation for shared responsibility and action.

While there is a growing appreciation of the importance of EDI within research-intensive organizations,[8] knowledge, skills, and interest in EDI vary from person to person. Currently, much of the EDI work done at PI is led by dozens of members of the Inclusive PI Platform. However, Platform members are all volunteers with full research, study, and/or administrative workloads. To support ongoing work in EDI, we will add dedicated EDI personnel and resources.

Consultations with PI residents indicated broad interest in strengthening EDI skills and competencies. Strengthening EDI knowledge and competencies will also enable the successful implementation of this strategy. In line with this, a goal for this focus area is to increase understanding of EDI concepts, expectations, and best practices throughout PI. In some instances, this will mean broad-based workshops for the whole community. In others, it will involve specialized training and resources that are appropriate for certain roles and functions (e.g., hiring, student supervision, career management).

PI's culture, and the field of EDI itself, are dynamic. Ongoing learning, assessment, and reflection will help us integrate EDI thoughtfully.

1.2 Objectives
- Provide appropriate resources for EDI activities and programs
- Build understanding of EDI principles and practices, equipping the PI community to embed EDI effectively in all research, training, and educational outreach activities
- Communicate EDI initiatives and policies effectively
- Collect and analyze data on PI's EDI climate and demographics, and track activities and progress, as well as lessons learned
- Equip the entire Perimeter community, and especially our trainees, with EDI skills that they will take with them as they progress in their careers

1.3 Key Activities
- Recruit an EDI Lead to support implementation of this strategy, act as the focal point for EDI-related activities, advise leadership, and monitor PI's progress in EDI
- Provide EDI-related training on priority topics (e.g., recruitment, unconscious bias, respectful behaviour) to build competencies, communicate codes of conduct and relevant policies, and address any urgent EDI challenges that emerge

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[8] Making Excellence Inclusive; McMaster: Towards Inclusive Excellence; UBC: Inclusive Excellence; UofT: Inspiring Inclusive Excellence

- Ensure that all personnel involved in recruitment and hiring across the Institute (from students to administrative staff to faculty) are up to date with best practices for hiring (see Focus Area 4)
- Design and implement methods to collect and analyze data on PI's EDI climate and demographics
- Conduct a confidential survey of the full PI community every two years to determine issues and barriers relevant to EDI, as well as to measure progress on the strategic plan; the first such survey is projected for 2024
- Develop and implement a communication plan to regularly update the PI community on EDI initiatives, trainings, policies, strategies, and resources
- Ensure that all PI communications are proactive and respectful in representing diversity and fostering an inclusive climate
- Regularly educate the PI community on policies for confidentially reporting harassment or other issues and on resources available to support survivors
- Provide encouragement and resources for researchers to attend EDI-related conferences and workshops (e.g., the National Society of Black Physicists, Indigenous scientific associations); aim to host one an EDI-related conference in next five years
- Continue to expand Perimeter's collection of EDI-related resources (e.g., past training and workshops, research references, colloquia) available online and in the library
- Leverage PI's experience and resources to disseminate EDI knowledge broadly in the physics and STEM community (e.g., host events on EDI best practices)

1.4 Measures of Progress

- Hiring of EDI Lead, who will guide implementation of the elements outlined in this plan and the implementation roadmap
- Comprehensive, two-yearly climate and demographic surveys of PI community (the first is projected for 2024), with results communicated to the PI community and the Board
- Increase in self-reported level of EDI knowledge and skills among PI community members (as measured by EDI surveys)
- Improvement in self-reported sense of belonging among residents from underrepresented groups (as measured by EDI surveys)
- Growth in the EDI-related resources available to PI community members and in the number of individuals accessing these resources
- Inclusion of training, workshops, events, and discussions on EDI-related topics as a regular part of faculty, postdoc, student, and admin life at PI; collection of quantitative and qualitative data on these activities (e.g., numbers of participants, satisfaction with presentations)

Focus Area 2: Culture and Environment

2.1 Context

An inclusive culture and an accessible environment are crucial to realizing the full potential of all members of PI's community.

The culture and environment of any research-intensive organization set the stage for how community members approach their research, their work, and one another. When cultures are inclusive and environments are accessible, they eliminate barriers to excellence by allowing individuals to bring their full selves and do their best work.[9] Building an inclusive culture is particularly important in physics, where the culture has historically been unwelcoming for many groups (e.g., women and Black, Indigenous, and racialized persons).[10]

The Inclusive PI Platform has taken important steps to build a more inclusive culture and accessible environment (e.g., by advocating successfully for in-house mental health support, launching the PhD mentorship program, and creating strong 2SLGBTQ+ allyship). This is a good base for continued action to make PI more inclusive and to address remaining structural, cultural, and environmental barriers.

PI's Workplace Assessment Survey and consultations revealed several areas to be addressed. The survey indicated issues of microaggressions and/or harassment at PI, particularly for women. There are also gaps in communication, understanding, and appreciation between the research and administration teams. There are opportunities to better recognize all community members' contributions to achieving PI's mission, including work in EDI. Additionally, we can enhance our physical and virtual environment by going beyond the requirements set out in the Accessibility for Ontarians with Disabilities Act.

2.2 Objectives

- Articulate and enforce clear policies and standards of respectful behaviour, creating and sustaining a working environment where all community members feel safe and valued and are able to do their best work and research
- Better recognize the contributions of the administrative staff to achieving PI's broader mission
- Better recognize contributions to PI's culture and environment, including work in EDI, health and safety, inclusive mentorship and student supervision, and outreach
- Implement accessibility solutions (physical and virtual) that go beyond legislated standards to meet the needs of our increasingly diverse community and enable all community members and visitors to contribute fully

2.3 Key Activities

- Develop and implement an action plan for addressing and preventing microaggressions, harassment, and other disrespectful behaviours; this plan will include regular teachings,

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[9] Making Excellence Inclusive
[10] Interviews with external experts in EDI in physics and with members of the PI community.

communication of policies, and signed acknowledgement of the respectful environment code of conduct and harassment policies by all PI community members

- Continue to identify, address, and prevent accessibility barriers within PI's physical and virtual environments
- Celebrate PI's diversity; showcase excellent work of underrepresented members of the PI community and in the broader physics and STEM community
- Continue to provide welcoming and inclusive social events that celebrate diversity and make all members of the PI community feel welcome
- Continue to support the work of the Platform in breaking down silos between research and admin teams (e.g., through joint projects, events, and committee work)
- Acknowledge and celebrate the breadth of contributions from all members of the community, including work done in EDI; this may include establishing annual awards or recognition for staff, students, and faculty based on EDI work and impact on the PI community
- Continue the EDI colloquium series, with EDI-related colloquia occurring at least three times per year. Publish these colloquia online on PIRSA and SciTalks.ca
- Adopt inclusive mentorship practices, tailoring the guidance to the needs and background of individual mentees. (See Section 4.2.)
- Continue to develop and evaluate the Allyship program[11]
- Examine the Institute's activities broadly, through the lens of truth and reconciliation, to develop a comprehensive Indigenous Action Plan

2.4 Measures of Progress

- One hundred percent acknowledgement of key policies by PI faculty, postdoctoral researchers, students, and administrative staff
- Reduction in microaggressions, harassment, and other disrespectful behaviours (as measured by EDI surveys – see Section 1.3)
- Improvement in self-reported sense of safety and belonging by PI's community members, across all areas and at all levels of the organization (as measured by EDI surveys)
- Improvement in self-reported feelings of appreciation and recognition across the entire PI community and within underrepresented groups (as measured by EDI surveys)
- Consistent meeting or exceedance of legal accessibility standards in PI's physical and virtual spaces
- Increased participation (i.e., more volunteer mentors) in mentorship programs

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[11] The Allyship program offers person-to-person support to prospective and current residents of PI via friendly, confidential dialogue with representatives from the Inclusive PI Platform working groups. This support bypasses more formal channels by providing an accepting, non-judgemental context for conversations of a more sensitive nature, with the intention to welcome, support integration, acknowledge and address issues of identity, and offer information through access to resources and shared life experience. Consultations are provided by a peer who has "been there."

Focus Area 3: Governance and Leadership

3.1 Context

Successfully embedding EDI at Perimeter requires everyone, and especially leaders, to work together to prioritize and take accountability for EDI.

The Director and COO have a special role in advancing EDI at Perimeter by clearly indicating their commitment and showing action. However, the wider leadership team includes the faculty, academic staff, heads of administrative teams, and the EDI Lead (to be hired). To be successful, all of PI's leaders need to help in carrying out this plan and fully embedding EDI at PI. While some have participated in EDI work (e.g., through the Inclusive PI Platform), to date most have not.

The Institute will support the development of inclusive leadership skills so that policies, practices, and day-to-day activities (such as seminars, classes, and meetings) integrate EDI principles thoughtfully and effectively. PI's Board will also play an oversight role, advising and monitoring progress in EDI (via the Governance and HR committee). PI will also review, refine, and develop its policies and practices broadly, with an EDI lens, working to eliminate discrimination and bias and foster greater equity and inclusion at the Institute.

3.2 Objectives

- Strengthen engagement in EDI among the wider leadership team by building inclusive leadership skills and defining systems of accountability
- Revise recruitment and talent development practices to optimize the chances of recruiting and retaining faculty and administrative leaders with diverse backgrounds (see also Focus Area 4)
- Incorporate EDI principles in all relevant Institute policies to produce policies and procedures that are free from bias and discrimination and that support inclusivity, equity, and accessibility

3.3 Key Activities

- Build a diverse group of leaders at PI in research and administration (see also Focus Area 4)
- Support leaders with the processes and skills needed to champion and implement the Strategic EDI Plan, including ongoing education and EDI training
- Incorporate evaluation of EDI contributions into annual performance reviews for all leaders
- Review, refine, and develop relevant policies to ensure EDI principles are appropriately embedded within them, working in collaboration with the broader PI community
- Ensure that policies and practices are effectively communicated, understood, and implemented
- Report annually to the Board and to the PI community on activities and progress in EDI

3.4 Measures of Progress

- Increased diversity in PI's research and administrative leadership (e.g., the number of women and Black, Indigenous, and racialized persons among leadership)

- Increased participation rates by PI leaders in EDI education and training and in the work needed to advance EDI further at the Institute (e.g., participation in the Platform)
- Number of policies, practices, and systems that are reviewed, reformed, and/or created to embed EDI principles and best practices
- Improved knowledge and understanding of PI's EDI-related policies among PI community members (as measured by EDI surveys)

Focus Area 4: Recruitment and Talent Development

4.1 Context

Our success relies on the talent we attract and retain. We need to attract, develop, and retain a diverse team of outstanding researchers, students, and staff.

The goal of inclusive excellence is to maximize both excellence and diversity in recruitment, promotion, and retention. In recruitment, this requires adopting transparent and consistent criteria by which we evaluate the expertise, qualifications, and experience required to excel in each role. Further, Perimeter's ability to succeed in its mission may be enhanced by recruits with broader skills and experiences (e.g., previous contributions to EDI, mentorship, or science communication). Additionally, by adopting an inclusive mentorship approach, in which mentorship is tailored to the unique needs and background of the mentee, we believe we can improve career development and satisfaction. [12]

The PI community gets less diverse as seniority increases (i.e., at the faculty and administrative director levels). PI's Workplace Assessment Survey revealed a strong desire for greater diversity in all roles at PI, with particular interest in seeing more women in leadership roles, in both research and administration, to better reflect the demographics of the PI community. The survey also highlighted the need for greater transparency around how recruitment, promotion, and pay decisions are made.

In physics more generally, certain groups (e.g., women and Black, Indigenous, and racialized persons) have been historically excluded and are currently underrepresented, underscoring an opportunity for PI. The Institute is already doing good work broadening the talent pipeline, and it can build on this to expand existing training and outreach programs to increase the participation of underrepresented groups in physics and STEM more broadly.

4.2 Objectives
- Build a vibrant and equitable organization that supports diverse talent across all career stages and functions
- Adopt EDI best practices into recruitment, promotion and tenure reviews, professional development, and compensation policies to attract and retain diverse and outstanding talent across the PI community
- Ensure transparency of PI's policies and practices for recruitment, promotion, and compensation
- Develop inclusive mentorship programs across a spectrum of roles to support individuals' success

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[12] Inclusive mentorship focuses on building mentor–mentee relationships that respect the unique values, perspectives, experiences, and interests of the mentee. The aim is to make the mentee feel they belong and ensure that the knowledge and skills provided to them meet their career needs.

- Extend PI's EDI commitment to the broader community through ongoing and targeted outreach to youth from groups that are underrepresented in physics and STEM

4.3 Key Activities

- Foster interest in and pursuit of education and careers in physics and STEM by broadening outreach efforts to diverse groups (e.g., targeted outreach to communities of disabled students)
- Examine and revise recruitment and promotion practices through an EDI lens; assess the effectiveness of any new practices adopted
- Specific practices to be examined and/or adopted may include the following:

i. **Regarding the Research team** (including faculty recruitment, hiring, and tenure; postdoc hiring; and student admissions):
   - On all admissions, hiring, and tenure committees, include an EDI champion and have broad representation with regular turnover to educate all faculty and PSI lecturers on the standards and processes that promote equity and diversity
   - Standardize recruitment processes (e.g., develop rubrics and standardized interview questions)
   - Provide training in equitable practices and unconscious bias for members of admissions, hiring, and tenure committees, and evaluate effectiveness of the training
   - Refine position descriptions to be more inclusive; encourage applicants to include information on past EDI contributions
   - Expand networks to reach more diverse candidates and ensure balanced shortlists
   - Ensure each application is given a fair and comprehensive review and that the structure of the admissions process does not disadvantage particular populations of applicants
   - Identify and articulate the goals of the PSI, PhD, and postdoc programs, and align admissions or hiring procedures with these goals
   - Adopt practices for judging growth potential, recognizing that past performance alone may not accurately gauge the future potential of student or postdoc candidates
   - Achieve more balanced shortlists (with a default goal of 25 percent representation of women and/or members of underrepresented groups) in every hiring competition
   - Hire for diversity; that is, earmark some positions for a priority recruitment group (e.g., women), with recruitment open to researchers in any of PI's research areas (rather than focused on one) to attract a range of excellent candidates
   - Track diversity of the applicant pools through voluntary surveys
   - Assess why offers to some candidates from underrepresented groups are declined and be proactive in addressing concerns (e.g., a lack of job opportunities for partners)
ii. **Regarding administrative staff recruitment, retention, and promotion:**
   - Review, update, and post policies and guidelines for recruitment, hiring, and admissions on PI's website/PION and communicate them to relevant committees and hiring authorities
   - Ensure hiring authorities have training in equitable practices and unconscious bias
   - Refine advertisements for new positions to be more inclusive; expand networks to reach more diverse candidates and ensure balanced shortlists

- Develop and implement new transparent guidelines on how promotions are granted
- Ensure job descriptions and titles, performance evaluation, and compensation reflect day-to-day workload, responsibilities, contributions to EDI, and market comparators

iii. **Regarding mentorship:**
- Compile, distribute, and post resources for effective and inclusive mentorship; offer mentorship training to all faculty and teaching staff
- Expand mentorship programs to include a broader range of roles
- Develop approaches to evaluate effectiveness of mentors and supervisors; encourage further learning and recognize improvements in mentoring and advising.

iv. **Regarding compensation:**
- Review and update compensation policies regularly, ensuring fairness and pay equity
- Conduct external market review on a bi-annual basis
- Build leaders' understanding of PI's compensation practices to ensure they can explain compensation decisions and properly address questions from staff
- Continue to regularly review the qualifications, responsibilities, and effort for all roles at PI to ensure jobs are evaluated correctly and to maintain pay equity

4.4 Measures of Progress

- Greater diversity across the PI community (e.g., faculty, postdocs, graduate students, academic staff, and admin staff)
- Improvement in self-reported sense of equity and fairness (e.g., in pay and workload)
- A high level of understanding and trust in PI's recruiting, promotion, and compensation practices
- Improvement in mentorship experiences reported by mentees and mentors (as measured by EDI surveys)
- Increased number of and participation in outreach events delivered for underrepresented groups in physics

Focus Area 5: Research

5.1 Context

Increasing EDI at Perimeter can increase our potential for scientific breakthroughs.

The principle of inclusive excellence recognizes that diversity in background, lived experience, and educational history – among many other factors – can enrich creativity, strengthen research quality, and drive innovation. Many academic institutions and research organizations are adopting this principle to increase impact in research and complementary domains, including recruitment, teaching, mentorship, and outreach.

The goal of inclusive excellence is, then, to maximize excellence and diversity together. While the previous focus areas all lead to this goal as well, inclusive excellence requires additional efforts, such as proactively searching for new talents from underrepresented groups, using expanded metrics that assess future potential as well as past accomplishments, and possibly even broadening PI's research focus to consider approaches and areas outside the Institute's current activities. It will also require putting appropriate supports in place to ensure new recruits from underrepresented groups can excel at Perimeter. Of course, we will continue to apply rigorous standards in all research hiring and promotion decisions.

Inclusive excellence will also create a research environment and culture where people from all backgrounds can thrive and contribute to PI's mission. This will express itself in many ways, for example in more diverse research teams, greater diversity in the scientific visitors and speakers invited to give seminars and conference talks, and codes of conduct that enable all to feel comfortable contributing to the scientific discourse.

5.2 Objectives

- Ensure that all research and training activities at PI – seminars, conferences, teaching, mentoring, and research – reflect the Institute's commitment to EDI
- Build diverse research teams to maximize Perimeter's ability to achieve its mission (see Focus Area 4)
- Effectively support students and researchers from underrepresented groups so that they can excel (e.g., via inclusive mentoring)
- Develop EDI-related skills and understanding among researchers and graduate students that they can integrate into their onward careers

5.3 Key Activities

- Hold EDI discussions and training as part of new faculty, postdoc, and student orientations (see Focus Area 1)
- Encourage and recognize EDI contributions in annual faculty reviews and in annual progress reports for postdoctoral researchers

- Develop and apply expanded metrics to assess research potential (e.g., for student and postdoc applicants) and research excellence (e.g., for faculty recruitment or tenure decisions) – see Focus Area 4
- Develop different ways to participate in seminars and conferences or to collaborate (e.g., remote versus in-person)
- Increase diversity in the full range of PI's visitor programs (i.e., Distinguished Visiting Research Chairs, Visiting Fellows, Affiliates)
- Ensure diversity of speakers for seminars and colloquia, as well as conferences and workshops; track the diversity of speakers over time and set targets for these programs
- Ensure that inclusive codes of conduct are followed at all scientific events (e.g., seminars and conferences) such that discourse is respectful and all feel comfortable contributing

5.4 Measures of Progress
- Increased recognition of the value of diversity to research (as measured by EDI surveys)
- Improved understanding of inclusive excellence across the PI research community (as measured by EDI surveys)
- Increased numbers of graduate students and researchers attending EDI trainings and workshops
- Improved understanding of inclusive excellence and intention to carry this forward in onward careers (as measured by exit surveys)
- Increased diversity among seminar and colloquium speakers, visiting researchers, and conference speakers and organizers

Implementation Considerations

To implement this plan thoughtfully and effectively, we will need to collect high-quality quantitative and qualitative data at regular intervals. This will provide a basis for understanding needs, setting and adjusting priorities, and making evidence-informed decisions.

Hence, it will be important to design and implement effective methods to collect and preserve the necessary data. As described in Section 1.3, we plan to carry out a full climate survey of the PI community every two years. We will also maintain channels whereby people can confidentially post complaints, experiences, and ideas (e.g., the EDI "Suggestion Box").

Data collected through these methods will:

- Provide insight into the makeup of PI's community (e.g., demographics)
- Inform and improve EDI training, EDI conferences and workshops, mentorship, and outreach programs
- Ensure new policies are understood and adhered to
- Demonstrate progress in creating an accessible environment
- Create a feedback mechanism for PI's community to confidentially raise EDI-related issues

The Role of the Inclusive PI Platform

Over the past three and a half years, the Inclusive PI Platform has spearheaded EDI-related work on many fronts. It has also provided a voice for groups at all levels of PI. We aim to build on the energy and creativity of the Platform, while providing more institutional support to lighten the load on volunteers.

We will revise the structure of the Platform with four aims in mind:
1. Reducing the demands on the Platform leadership
2. Providing greater authority and resources
3. Better integrating the Platform with PI's leadership
4. Providing the Platform a firm place in the Institute's organizational structure

While the operational details need to be fully developed and validated over time, it is expected that PI's new EDI Lead will take a "shepherding" role in the Platform. An initial proposal is that the Platform co-chairs and working group chairs will evolve toward a steering committee that will include the EDI Lead. This committee will identify, address, monitor, gather input on, and provide feedback on PI's EDI priorities, engaging the broader PI community in task forces (replacing standing working groups) as needed.

Glossary of Terms

2SLGBTQ+: Two-Spirit, lesbian, gay, bisexual, transgender, queer, and additional sexual orientations and gender identities.

Accessibility: ensuring that everyone along the continuum of human ability and experience can participate. This means, for example, physical and virtual spaces that meet best practices in accessibility to enable full participation in research, work, and social and community events.

Diversity: ensuring that a wide range of perspectives and lived experiences is represented in a group or organization. Dimensions of diversity explored in Canada's Dimensions Charter, for example, include women, Indigenous Peoples, persons with disabilities, members of visible minorities or racialized groups, and members of 2SLGBTQ+ communities.

Disability: a physical or mental condition that limits a person's movements, senses, or activities

Equity: ensuring the fair treatment of all members of a community. This means ensuring a level playing field for all those working, learning, or doing research at PI – in terms of pay, career advancement, etc.

Gender: the socially constructed roles, behaviours, expressions, and identities of girls, women, boys, men, and gender-diverse people. It influences how people perceive themselves and one another, how they act and interact, and the distribution of power and resources in society. Gender identity is not confined to a binary (girl/woman, boy/man), nor is it static; it exists along a continuum and can change over time. There is considerable diversity in how individuals and groups understand, experience, and express gender through the roles they take on, the expectations placed on them, relations with others, and the complex ways that gender is institutionalized in society.

Inclusion: creating and maintaining an environment in which any individual can feel welcomed, respected, represented, supported, and valued and can fully participate. This means, for example, a research culture where everyone feels safe contributing and where critique is encouraged and respectful.

Inclusive excellence: a principle that asserts that diversity in background, lived experience, and educational history enriches creativity, strengthens research quality, and drives innovation.

Inclusive mentorship: building mentor–mentee relationships that respect the unique values, perspectives, experiences, and interests of the mentee. The aim is to make the mentee feel they belong and ensure that the knowledge and skills provided to them meet their career needs.

Microaggressions: indirect or subtle behaviours that signal hostility to underrepresented or marginalized groups, whether intentional or not (e.g., someone assuming another person holds a lower status position than they do).

Personal harassment: abusive, unfair, or demeaning treatment of a person or group of persons that is known or ought reasonably to be known to be unwelcome and unwanted when (a) such treatment abuses the power one person holds over another by virtue of their employment relationship or misuses authority associated with their position of employment; (b) such treatment has the effect of seriously threatening or intimidating a person and such treatment has the effect of unreasonably interfering with

a person's or a group of persons' employment or performance; (c) such treatment has the effect of creating an intimidating, hostile, or offensive work environment.

Sex: a set of biological attributes in humans and animals. It is primarily associated with physical and physiological features, including chromosomes, gene expression, hormone levels and function, and reproductive and sexual anatomy. Sex is usually categorized as female or male, but there is variation in the biological attributes that make up sex and how those attributes are expressed.

Sexual assault: (a) Any form of unwanted, forced, or coerced sexual activity, including kissing, fondling, touching, and any kind of intercourse, that is done to someone without their consent; (b) any attempts or threats, by an act or a gesture, to force sexual activity onto someone, if the person committing the act had or caused a person to believe the individual committing the act had the present ability to act on the attempt or threat

Sexual harassment: (a) Vexatious sexual conduct or a course of comment that is known or ought reasonably to be known as unwelcome; (b) a sexual solicitation or advance made to a person by another individual where the other individual is in a position to confer a benefit on, or deny a benefit to, the person to whom the solicitation or advance is made, where the individual who makes the solicitation or advance knows or ought reasonably to know that it is unwelcome; (c) a reprisal or threat of reprisal against a person for rejecting a sexual solicitation or advance.