

Striving for Equity, Inclusion, and Safer Spaces at Work: A Review of the Literature

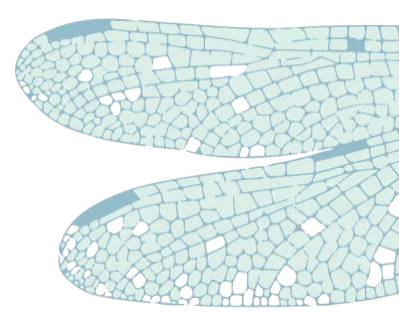
A Mitacs Accelerate Project for Calian Ltd.

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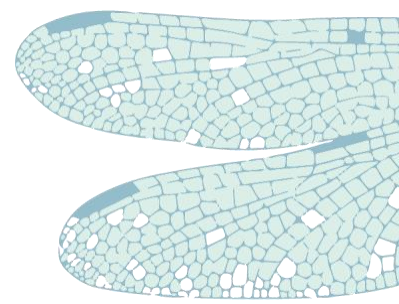
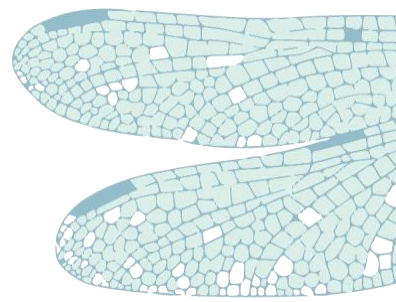
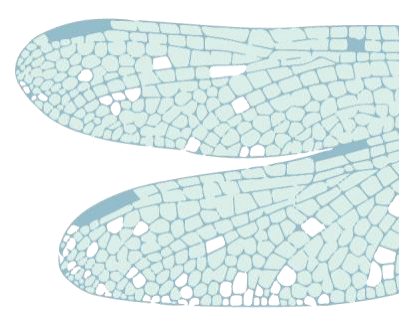


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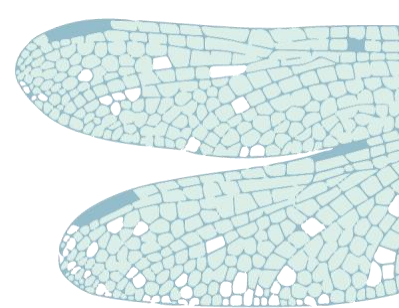
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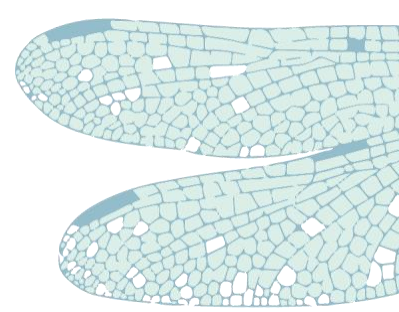
Key Messages

These 10 key messages synthesize the main findings from this research. Each key message includes related action items. Clicking on the action item will take you to the section of the report that includes more details about that action.

- 1. Most organizations are reflections of the broader society in which they exist. They have been founded on and operate to privilege narrow ways of being. Racism, (hetero)sexism, ableism, and other forms of oppression operate structurally and systemically to try and hold these privileged ways of being in power. To dismantle these systems of oppression, organizations can:**
 - [1.1](#). Assess the current workplace culture by conducting a cultural audit.
 - [1.2](#). Ensure structural changes are informed by an intersectional lens, rather than lenses focused on one identity, and provide opportunities for staff to offer feedback in ways that are not constrained to the institutional hierarchy.
- 2. Language is important: Organizations should be precise about the terms they use in their equity, diversity, and inclusion (EDI) efforts. By establishing clear definitions, a shared understanding can pave the way towards more effective change. Organizations can:**
 - [2.1](#). Offer clear definitions of words when using them.
 - [2.2](#). Try to eliminate vagueness that may arise because of unclear language about promises related to EDI. For example, by including a glossary of key terms as part of organizational policy, employees will gain a better understanding of what promises the organization is making.
- 3. Equity efforts are most effective when they start by responding to the experiences of those who have experienced historical and/or ongoing marginalization. To begin this work, organizations can:**
 - [3.1](#). Create “safer spaces” for folks who have experienced historical and/or ongoing marginalization to ensure they can exist as their authentic selves without fear of judgement.
 - [3.2](#). Create “safer spaces” for people with privilege to critically reflect on their privileges. This is a necessary component of conscious workplaces.
 - [3.3](#). Provide compensated opportunities for those most marginalized to inform organizational policy, without demanding anyone participate more than they are comfortable with.
- 4. Many unsuccessful diversity and inclusion programs fail at least in part because they do not question the structures of the organization or the pre-existing organizational culture. Organizational culture encapsulates workplace dynamics, shared practices, and values. To begin shifting organizational culture, organizational leaders can:**



- 4.1. Engage in self-reflection to consider how those with privileged identities have shaped, and continue to shape, their workplace, and encourage employees to do the same.
- 4.2. Lead by example to encourage a shift in culture that ensures all employees are safer and more comfortable being their authentic selves in the workplace.
- 5. Establishing a workplace culture that is intolerant of harassment, discrimination, and mistreatment is necessary for the success of EDI and other related policies and practices. Culture change in an organization takes *time*. Often, change initiatives fail in part due to a lack of patience and persistence. To establish a new culture, organizations can:**
- 5.1. Be persistent about introducing new ideas and reinforcing commitments against harassment and discrimination.
- 5.2. Acknowledge that this pursuit is ongoing. EDI transformations require us to continually challenge our own assumptions and biases to establish more inclusive workplaces.
- 5.3. Establish EDI Committees, which are an effective way of maintaining a commitment to equity, diversity, and inclusion, and should be treated as an integral part of the process, rather than an afterthought.
- 6. Meaningful implementation of EDI and other related policies and practices, and efforts towards creating safer, more inclusive workplaces, begin with a commitment, and changes, at the organizational level. An organization's leaders can:**
- 6.1. Actively and vocally support and endorse EDI initiatives and related policies. Leaders can be role models and be well-versed in and demonstrate what living out these commitments looks like.
- 6.2. Honour and include knowledge from people who have experienced historical and/or ongoing marginalization, by: inviting their participation throughout the organization's change process, including in developing the organization's vision, policy development, training, and evaluation practices. These efforts should be recognized as labour and compensated accordingly.
- 6.3. Implement a cultural audit, which can help organizations better understand their weaknesses, and identify existing power structures that shape their organizational culture.
- 6.4. Develop and implement explicit anti-harassment and anti-discrimination statements, as well as a code of conduct for all employees to abide by.
- 7. Training can be an effective tool when supported by organizational policy and workplace culture. Organizations can:**
- 7.1. Incorporate training about EDI and other related concepts into the overall onboarding process for new employees as they adjust to their roles.
- 7.2. Encourage, but not force, existing employees to participate in training, by giving them adequate time to participate.
- 7.3. Ensure that training is not treated as a one-off endeavor; to be effective, it should be continuous, and designed and revised in response to employee growth and feedback.



8. Training should emphasize self-awareness, self-reflection, and the development of a critical consciousness in all employees. Critical consciousness teaches individuals to understand how identities based on race, gender, sexuality (and more), and their intersections, play a meaningful role in how individuals experience and navigate interpersonal dynamics, policies, practices, and systems within an organization. Training with these emphases can help employees learn to have compassion for their coworkers' experiences of marginalization in the workplace. Organizations can:

8.1. Offer training in a variety of formats to accommodate different preferences for participation.

8.2. Cover a diverse range of topics through their training efforts.

9. There are several cautions to be wary of when undertaking EDI work. Organizations should:

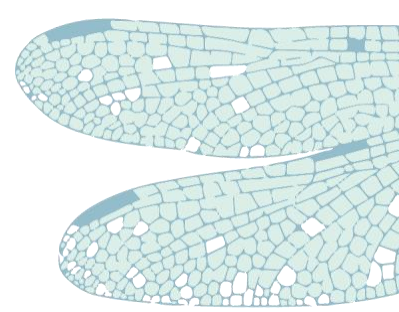
9.1. Avoid “colourblind” approaches, which imply that race doesn’t matter, and that racist structures only exist when they are intentionally constructed.

9.2. Avoid “tokenism”, which involves including people who have been marginalized in the decision-making process without listening to their knowledge and experiences, and without being willing to make substantive changes based on their lived expertise.

10. Monitoring and evaluating the implementation and effectiveness of EDI-related policies and practices is imperative and should be transparent to all employees. Monitoring and evaluation processes can:

10.1. Assess organizational progress toward key performance indicators related to EDI initiatives, such as diversifying leadership and staff teams.

10.2. Track the impact of training initiatives on employees at all levels of the organization.



Introduction

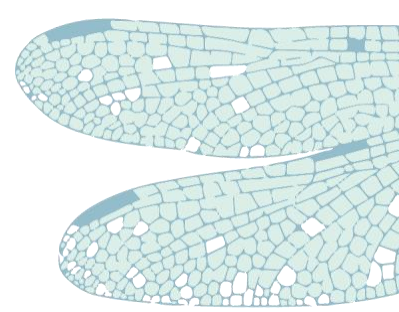
Background

This research report was prepared to inform Calian Ltd.'s efforts to ensure they are offering the most up-to-date, informed curriculum and training related to advancing equity, diversity, and inclusion (EDI) practices in workplaces. Calian seeks to better understand the academic and community literature related to fostering EDI, with a particular interest in the concept of "safe spaces." This report is one of several outputs emerging from a collaboration between Calian Ltd., the University of New Brunswick's Muriel McQueen Centre for Family Violence Research, and the University of Guelph's Live Work Well Research Centre.

EDI is a pressing and growing concern in the workplace. In the absence of EDI-related efforts, inequality, discrimination, and mistreatment of people and groups who have experienced, and continue to experience, marginalization will persist (Anicha et al., 2020; Arno et al., 2013; Fernando & Bennet, 2018; Kelly et al., 2020). Many groups of people continue to be underrepresented in positions of leadership (Alfred et al., 2018; Arno et al., 2013; Gray et al., 2019) and in the Canadian workforce at large. More inclusive and equitable workplaces can expect more loyalty and community amongst employees, as well as more innovation, engagement, and productivity (Borgkvist et al., 2021; Nicolaides & Poell, 2020; Wong, 2019). Additionally, EDI practices can and should be understood as corrective measures for past and present failings in the treatment of people and groups who have experienced, and continue to experience, marginalization (Wong et al., 2019).

While commitments to EDI have been identified as a priority for many organizations, they may not know how to achieve this (Lingras et al., 2021). Thus, Calian Ltd. wants to ensure its EDI-focused curriculum is useful and based on current promising practices. This involves identifying convergence and divergence amongst existing inclusive tools, concepts, and practices, to better understand how these can come together to form a set of overarching promising practices to produce safer workplaces for all. This report presents the result of a scoping review based on the following research questions:

- What principles and practices can and do workplaces adopt to facilitate inclusion, including related to recruitment/hiring, onboarding, orientation, training, retention, and evaluation?
- How can workplaces measure/evaluate the effectiveness of their implementation of these principles and practices?



Methods

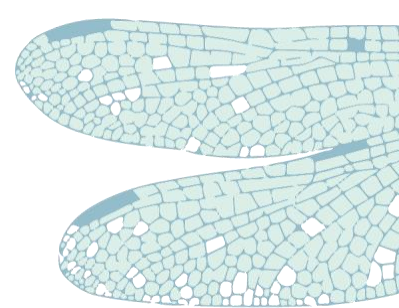
Guided by the research questions, and with guidance from the rest of the team, I searched relevant databases using several search strings. Examples of search terms included “Workplace AND safe” in line one, and “trauma informed” or, GBA+ OR intersectional*, or antiracis* OR anti-racis*, in line two (see Appendix A for complete list of search strings). I limited our results to publications from 2010 onwards. However, much of the literature was published more recently, since 2020, seemingly in response to the COVID-19 pandemic and the uptick of support for antiracism initiatives in response to the Black Lives Matter movement. Excluding duplicates, our initial search yielded 1,235 articles.

Using Covidence,¹ I reviewed the resulting abstracts. Because the team recognizes that equity-based problems are pervasive in many workplaces, articles focused on demonstrating the existence of such problems (discrimination, harassment, etc.) were excluded. Articles that reported on strategies for preventing, reducing, and/or addressing workplace discrimination or harassment, use and evaluation of EDI and related policies or practices, and/or the creation of “safe spaces”, were included and moved on to full-text review.

In total, 260 articles met the criteria for full-text review. In the full-text review, these 260 articles were screened, and those that discussed the conceptualization or operationalization of EDI, GBA+, intersectionality, anti-racism, anti-oppressive practice, and/or safe spaces, were retained. 96 articles met this criteria and are therefore included in this report. Many of these articles focused on EDI efforts in academia, with less literature available on the application of these concepts in other workplaces. The 96 included articles were coded based on criteria established in alignment with the research questions.

When synthesizing the findings for this report, I intentionally organized the results around different dimensions of the workplace. While each article tended to focus on a specific demographic or topic – for example, anti-racism in the workplace, or women’s equity in the workplace – our analysis suggests that most identified practices are likely beneficial for all people and groups who have experienced historical and/or ongoing marginalization. For example, the recommendation of transparency around the recruitment and promotion of women can be extended to calling for transparency around the recruitment and promotion of people across all marginalized identities. However, some identity-based recommendations are

¹ Covidence is a web-based software platform for systematic review. Covidence allows the user to upload a set of articles and streamlines the process of title and abstract screening, full-text review, and extraction. (Ref: <https://www.covidence.org/about-us-covidence/>)



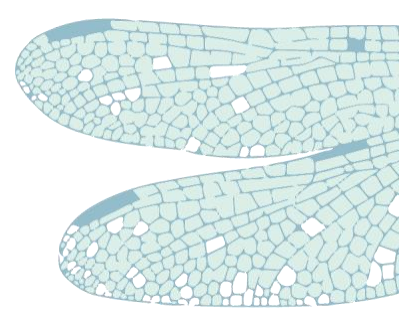
unique to the targeted group, such as explicit practices recommended for supporting transgender employees through transition. In these cases, recommendations are so identified.

General Findings

This section begins with a discussion on the importance of precise language in EDI practices and offers explanations of terms commonly used throughout the report. I then present the literature that focuses explicitly on safe spaces in the workplace, given Calian's particular interest in this concept, and in how it complements or conflicts with EDI practices. This is followed by a discussion on self-reflection as a necessary practice for change in the workplace, relevant across all levels of an organization. The subsequent findings sub-sections are organized according to where in the organization they need to be actioned. I begin by presenting promising practices to support EDI at the organizational level: developing an inclusive culture, EDI-supportive organizational policy, and EDI committees. Next, I discuss promising practices at the leadership level, specifically EDI-supportive skills and actions a leader can have and take. I then discuss promising practices in EDI training, organized around logistics, delivery, and content. Finally, I present a brief discussion around practices to be cautious of when engaging in EDI work, with references to alternatives detailed throughout the report. The report concludes with summary thoughts about the importance of this work.

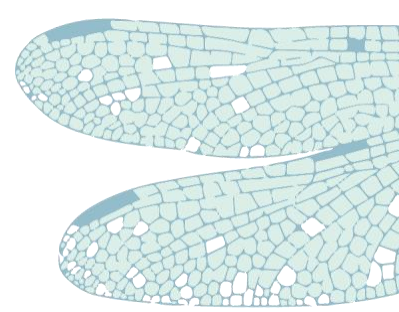
The Importance of Language

Using intentional language is a fundamental base for all EDI-related practices (Brancu & Hayes, 2020; Lingras et al., 2021; Murphy, 2018). Organizations and their policies must be specific and precise about what they mean by the practices they claim commitments to – **equity**, **diversity**, and **inclusion**, for example – by offering clear definitions of what is meant when these terms are used. Otherwise, what these commitments entail remains vague (Brancu & Hayes, 2020), and unintended challenges may arise (Murphy, 2018). Being explicit about the meanings of terms lays the foundation for a shared language, which unites understanding and provides momentum for change (Lingras et al., 2021). As such, this report includes a glossary of terms synthesized from the findings (see Appendix B). The glossary reflects the definitions of the terminology derived from the literature. For the sake of clarity while reading the report, I also offer some of the key definitions here:



When I refer to EDI practices, we are referring to practices intended to support and create the following in workplaces:

- **Equity:** Equity is a relative form of equality that takes into consideration the needs and characteristics of the individual, the context of the situation, and the circumstances that result in disparate outcomes (Baum, 2021). This involves recognizing that different groups have experienced, and continue to experience, disproportionate hardship, harm, and disadvantage, and taking measures that respond to these differences in ways that ameliorate harm and ensure that everyone has access to the same opportunities (Lingras et al., 2021).
- **Diversity:** Diversity refers to the representation of differences across various identity dimensions – for example, race, ethnicity, gender identity, neurodiversity, sexual orientation, disability, etc. (Baum, 2021; Costigan et al., 2020; Lingras et al., 2021; Murphy, 2018; Selzer & Foley, 2018). Here, it is important to note is that representation without meaningful inclusion is tokenistic (Arno et al., 2013; Levy et al., 2020).
- **Inclusion:** Inclusion is the intentional, ongoing effort to ensure that diverse people with different identities can fully participate in all aspects of the work of an organization, including holding leadership positions and influencing decision-making processes (Lingras et al., 2021; Selzer & Foley, 2018) (see Appendix B for a more robust explanation).
- **Intersectionality:** Emerging from Black feminism and critical race theory (Alfred et al., 2018), intersectionality aims to understand how peoples’ experiences are shaped by interactions between aspects of their identity (e.g., race and gender, sexual orientation and age, race, and disability) and systems of power (e.g., colonialism, sexism and heterosexism, racism). People can be harmed, and peoples’ experiences can be missed, minimized, misunderstood and/or overlooked when we only pay attention to one dimension of someone’s identity (Baum, 2021; Lund et al., 2022; Selzer & Foley, 2018). For instance, if an organization is reviewing its policies through only a race-informed lens, they may fail to account for the experiences of Black women (whose experiences are shaped by racism *and* sexism *and* their interactions), or gay Black men (whose experiences are shaped by homophobia and heteronormativity, racism, *and* toxic masculinity *and* their interactions). An emphasis on intersectionality refers to the need to understand identities as *interactive*, rather than additive (Linder & Rodriguez, 2012; Schultheiss, 2021; Trittin & Schoeneborn, 2015).
- **Promising Practices:** The team intentionally decided to use the term “promising practices” (rather than “best practices”) throughout this report. Because practices are often implemented without being accompanied by

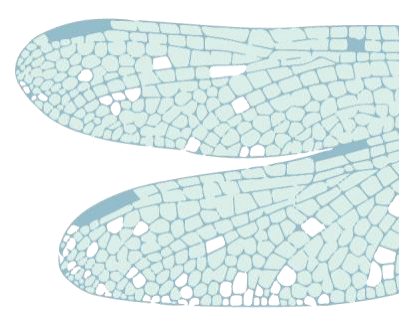


systematic evaluation, there is often no empirical grounding for the superlative, “best”. Additionally, these practices are continually evolving – as we learn more, we know better, and can do better. Thus, this report reflects the knowledge captured in the literature at this point in time and offers a foundation for future efforts to advance EDI.

Creating Safer Spaces

The following discussion of safe(r) spaces in the workplace is organized under two subheadings: origins of safe spaces, and present uses of the term. First, I offer an overview of the emergence of “safe spaces” as a concept specifically pertaining to the establishment of separate spaces in society and the workplace for people with experiences of marginalization to exist free from judgment (Bairstow, 2007). Then I discuss the subsequent expansion and deployment of “safe spaces” as a concept to denote entire spaces (i.e., a workplace) in which all individuals are welcomed and included, free from judgment, and held accountable for the proper treatment of all (Linder & Rodriguez, 2012; Lingras et al., 2021; Wong, 2019). An important takeaway from this is that today, the term “safe space” may be used to denote a separate space (physically or figuratively) *within* an organization designated for a certain group, or the designation of the *overall* organizational environment as a space that is intolerant of harassment, discrimination, and mistreatment.

The priority when establishing safer workplaces is ensuring that historically marginalized groups do not face mistreatment. This intolerance should be supported across and within the entire organization, woven into its social fabric (Bairstow, 2007). As well, the designation of separate spaces for different groups to meaningfully explore and engage with those with whom they may share an identity or experience continues to be of importance. Furthermore, establishing safer workplaces involves providing opportunities for those with privileged identities to explore and unlearn their prejudices and biases; however, care must be taken to ensure that this does not compromise the safety and well-being of historically marginalized folks (Sekerka & Yacobian, 2018). Thus, separate spaces can also be created to intentionally guide those with privileged identities in addressing their biases and prejudices, ensuring these spaces are not co-opted to allow for the perpetuation of oppressive ideas. Ultimately, each of these components sit together to support the pursuit of safer, more inclusive workplaces for all.



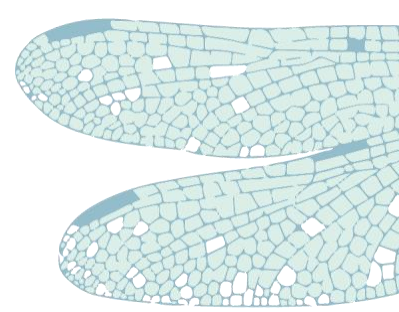
Origins; Safe spaces for marginalized groups

The concept of “safe spaces” emerged from the LGBTQ+ community’s efforts to establish separate spaces in society in which members could be free to be themselves without judgement (Bairstow, 2007). Over time, the use of the term has expanded and been adopted by different groups, organizations, and scholars. While much of the literature continues to use the term “safe spaces”, alternatives have been suggested. These include “critical collective spaces” (Wallin-Ruschman & Patka, 2016) and “brave spaces” (Page et al., 2021). Wallin-Ruschman and Patka (2016) propose the term “critical collective spaces” as a replacement for “safe spaces”, believing it represents the importance of community and a commitment to offering an alternative to oppressive and hierarchical culture, without “promising a false sense of all-encompassing safety” (p. 327). Page and colleagues (2021) proposed the term “brave spaces”, to acknowledge that “at times we may feel uncomfortable or choose to take risks or that we may enable spaces of grace, where we accept people however they show up and trust the process will deepen our understandings and connections” (p. 5).²

Our research team recognizes the concern raised by Wallin-Ruschman and Patka (2016) that labeling a place as “safe” can give a false sense of security, and by Page et al. (2021) that we cannot assume what “safe” looks like for all employees. Thus, we align with Anderson and Riley (2021) and Baird and Alaggia (2019) who suggest the term “safer spaces”. Use of this term implies that we cannot know what a safe space looks like for all, and that striving to make spaces safe requires consistent reflection, feedback, and re-negotiation. Accordingly, we use the language of the original author(s) when discussing their research as part of the findings presented here but use the term “safer spaces” in our synthesis of results and recommendations.

In essence, a safe space is one in which all individuals can bring their whole, authentic selves free from fear of judgement (Linder & Rodriguez, 2012; Lingras et al., 2021). More specifically, safe spaces were originally constituted by smaller groups within an organization in which members share a marginalized identity. These can be physical or figurative spaces that allow members to discuss their identities, interests, and requirements, independently of the larger group (Alfred et al., 2018; Bairstow, 2007; Wallin-Ruschman & Patka, 2016). Membership may be limited to maintain small, intimate groups that may allow for more free expression

² It is critical that these spaces are not mis-used and allowed to perpetuate racism, sexism, and other oppressive conversations under the guise of “bravely” sharing. Separate spaces can be provided for employees from historically privileged groups to do the work of unpacking prejudices and biases, without compromising the safety and well-being of others.

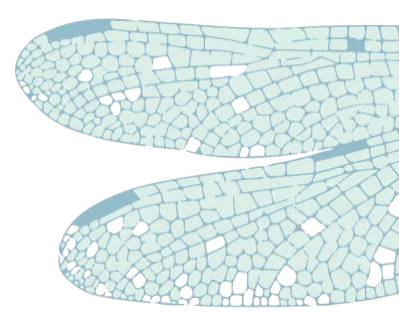


and support community building (Wallin-Ruschman & Patka, 2016). However, commitment to and support from the over-arching group is important for ensuring that the safe space is not encroached upon or reclaimed by the mainstream (Bairstow, 2007).

Page and colleagues (2021) note that no one can assume what a safe(r) space looks and/or feels like for others. It is important that workplaces facilitate the means through which employees can share what a safer space would look and feel like for them, and that these insights be meaningfully considered and incorporated into workplace practices (Bairstow, 2007; Linder & Rodriguez, 2012; Page et al., 2021). For example, in a study with Black women students on a university campus, one participant described a safe space as consisting of educated people to whom she did not have to explain her anger. Components of safe spaces described by participants included knowledge and education about marginalization and having allies who would speak up when they observed potential marginalization. Participants also described the importance of programming that could help students explore their identities, both dominant and marginalized, and how these identities intersect and shape experience (Linder & Rodriguez, 2012).

Additionally, an understanding of intersectionality is important for creating and maintaining safer spaces (DeJonge, 2016; Lund et al., 2022). Safe spaces are often created around a shared identity (e.g., gender, race, disability, sexuality), but members of any group will often have other identities (e.g., other genders, races, abilities, sexualities) that intersect with the identity centred in the safe space. For example, the experience of being a Black woman with a disability involves experiences and needs that are not captured by the experiences of Blackness, womanhood, or disability discretely, but rather exist because of the unique intersections of these identities (Lund et al., 2022). It is imperative that safer spaces are imbued with this awareness so that members can feel connected by their shared identities, but not at the cost of the erasure of their intersectional identities.

The creation of safer spaces within an organization, and all calls for greater equity and more inclusive practices, can be understood as corrective measures for past and present failings in the treatment of historically marginalized people. Literature about safe spaces highlights that all equity efforts are most effective when they start by responding to the experiences of the most marginalized (Wong, 2019). It is imperative that while safer spaces are supported on an organizational level (Bairstow, 2007) they are ultimately created by and/or in partnership with the specific groups and communities they are intended to serve (Linder & Rodriguez, 2012; Page et al., 2021; Wong, 2019). When working towards creating safer spaces, it is common to have group members create guidelines of what they need to feel open to participate, take risks, and be vulnerable. Rules of engagement often include items such as: respect, active listening, speaking from one's own



experience, participation, open-mindedness, and dialogue (Wallin-Ruschman & Pakta, 2016).

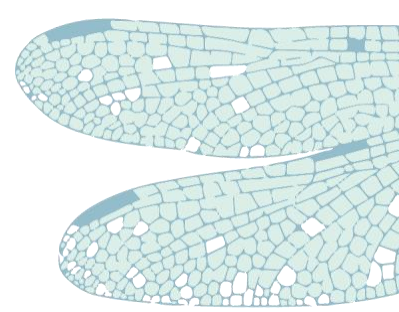
Present; Safe(r) spaces for critical growth

While the concept of safe spaces developed in reference to spaces for members of marginalized groups to be ‘safe’ from the oppression of dominant norms (Bairstow, 2007), use of the term has since diversified. In addition to separate spaces designated for historically marginalized groups, researchers acknowledge the need for spaces in which members of any group can recognize and address their biases and prejudicial attitudes, to work together towards inclusive engagement and sustained respect (Lingras et al., 2021; Sekerka & Yacobian, 2018). In this way, critical reflection is integral to creating safer spaces where individuals can acknowledge their identity, relatedness, and worldviews. Through critical reflection, individuals can become aware of and deconstruct their fears, defensiveness, guilt, and negativity (Fernando & Bennett, 2018).

Critical reflection is important for both employees and leaders of workplaces. Leaders and others in positions of power, including those with privileged identities, should be encouraged to self-reflect and step outside their comfort zones to ensure they are contributing to the establishment of safer workplaces for all (Plotnikof et al., 2021). For those who hold historically privileged identities, professional contexts – often marked by norms associated with White heterosexual masculinity – have likely been experienced as safe spaces all along. However, experiences of insecurity and vulnerability are part of everyday organizational life for employees who have experienced or continue to experience marginalization. The important work of critical reflection may raise feelings of discomfort in those who hold privileged identity positions, however this discomfort should not be mistaken for a lack of safety. Working to understand one’s social location and how one has benefitted from historically oppressive systems is imperative in striving for safer spaces (Plotnikof et al., 2021), even if it is difficult. Thus, it is important to note that the term “safe(r) space” does not necessarily refer to an environment without discomfort, struggle, or pain, and confronting issues that make one uncomfortable can be essential for learning and growth (Holley & Steiner, 2015).

Specific practices for supporting safer spaces include:

- Creating separate opportunities for inter-workplace activity that allow members to discuss openly, independent from the overall group (this can be a physical space in the workplace, or a separate online space – the form it takes should be determined with/in response to the group)



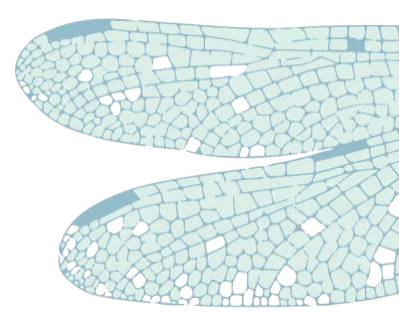
members' specific needs) (Bairstow, 2007; Wallin-Ruschman & Patka, 2016);

- Supporting the development of networks for historically marginalized groups (Plotnikof et al., 2021), who often continue to experience marginalization;
- Allowing room for identity development, social support, emotional connection, and a sense of community (Wallin-Ruschman & Patka, 2016);
- Facilitating the development of **critical consciousness**; an ongoing practice in which individuals work to understand how identities based on race, gender, sexuality (and more), and their intersections, play a meaningful role in how individuals experience and navigate interpersonal dynamics, policies, practices, and systems within an organization (Wong, 2019); and
- Having group members create guidelines of what they need to feel open to participate, take risks, and be vulnerable (Linder & Rodriguez, 2012).

The concept of safer spaces in the workplace is not uniformly established. The term has expanded and diversified from its original use by marginalized groups in society to be used in different ways. These other uses of the term do not always reference its origins but do make distinct and important contributions to thinking about more equitable and inclusive workplaces. Ultimately, striving for safer spaces involves establishing and pursuing safety in the workplace by offering separate spaces, not only for members of historically and currently marginalized groups to connect, build networks and community, and share experiences, but also for members of privileged identity groups to engage in critical reflection, explore their prejudices and biases, and be compassionately held accountable for contributing to the work of dismantling oppressive systems [e.g., acknowledging the discomfort that may accompany learning about how one has been privileged by systemic racism, without allowing for further perpetuation of racism (Holley & Steiner, 2015; Wong, 2019)]. Striving for safer spaces in the workplace also requires a commitment from the organization to maintain a workplace environment that is intolerant of harassment, discrimination, or mistreatment, and that values and is supportive of all employees' unique identities and experiences.

Self-Reflection as a Necessary Tool for Change

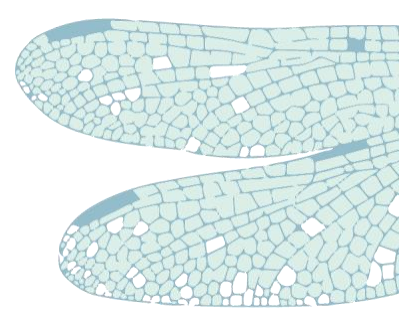
Self-awareness and reflection by all employees are critical for advancing equity and inclusion in the workplace. Self-awareness and an understanding of one's own social location(s), and the ways these shape one's experiences and interactions, is



informed by self-reflection (Sekerka & Yacobian, 2018). Self-reflection involves thinking of past events, interactions, and experiences, considering one’s own point of view and how this is informed, as well as alternate views of an experience (Edmondson et al., 2019). Self-reflection should be critical, questioning what we, and others, might be taking for granted – what is being said and not said – and examining the impacts this might have on action and inaction (Nicolaides & Poell, 2020). Critical self-reflection is an essential step towards developing what is called “critical consciousness”, an ongoing practice in which individuals work to understand how identities based on race, gender, sexuality, class, ability (and more), and their intersections, play a meaningful role in how individuals experience and navigate interpersonal dynamics, policies, practices, and systems within an organization (see for example Wong, 2019). These practices are necessary for good leadership (Borgkvist et al., 2021; Chow et al., 2021; Murphy, 2018; Sekerka & Yacobian, 2018), quality training (Anicha et al., 2020), and ultimately, the development of an inclusive workplace culture (Arno et al., 2013; Fernando & Bennett, 2018).

While it is important for all employees to be self-aware (Sekerka & Yacobian, 2018), engage in self-reflection, and strive to develop critical consciousness (Nicolaides & Poell, 2020), members of privileged identity groups are most likely to have an unconscious and taken-for-granted experience of their organization’s culture (which often include White, masculine, heterosexual values) and how it reflects their identity and norms at the expense of others. It is not that they will never face challenges, but that these challenges will not be directly related to or compounded by virtue of the identities they hold. Therefore, they may be relatively unaware of what challenges are present for people with identities different than their own. Becoming aware of these gaps in their understanding that is an important step towards creating safer and more inclusive workplaces (Wong, 2019).

The practice of critical self-reflection is widely discussed, but directive discussions about how to foster the practice are uncommon. Edmondson and colleagues (2019) however, discuss the effectiveness of consciousness-raising experiences – “CREs” – for helping leaders develop their self-awareness, understanding of others, appreciation for diversity, and engagement with the larger world (see Text Box 1 for more details).



Text Box 1: A Look at Consciousness-Raising Experiences (CREs)

A consciousness-raising experience does not have to be centered around a traumatic event or incident but can come from interactions and courageous conversations with marginalized individuals. Initially achieved by sharing individual experiences through essays, articles, and lectures about one's experiences, CREs have evolved into real-time experiences that provide insights into how persons with different backgrounds and identities function (Edmondson et al., 2019).

Researchers have suggested a series of emotionally-based, reflective questions to help folks understand their responses to hearing of injustices:

- How did this experience make me feel (positively and/or negatively)?
- How did I handle my emotional reactions? Did I laugh, cry, make a face, etc., when the incident occurred?
- Should I have felt differently? Why or why not?
- How did I interpret the thoughts, feelings, decisions, and/or behaviours of others? How do I think others felt?

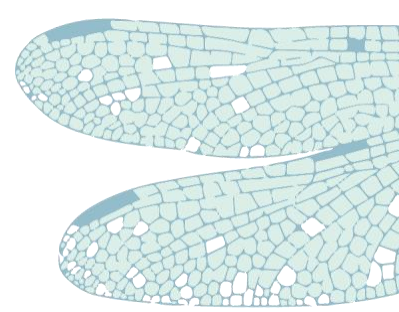
It is crucial that workplaces do not place undue labour on employees from historically and currently marginalized groups to put forth their own experiences for these purposes. There are many authors, activists, and speakers who have dedicated themselves to offering these teachings, and they should be sought out and compensated accordingly (Lingras et al., 2021).

Promising Practices at an Organizational Level

The development of more equitable, diverse, inclusive, and safer workplaces requires commitment and efforts at the organizational level (Bairstow, 2007; Baum, 2021; Plotnikof et al., 2021; Wong, 2019). Top-down strategies are not sufficient alone, but they are important for supporting the collective enactment more inclusive and safer workplaces (McCluney et al., 2017). This section of the report discusses the development of inclusive culture (and cultural audits as a tool to work towards this), the development and content of appropriate organizational policy, and the formation of EDI committees.

Development of Inclusive Culture

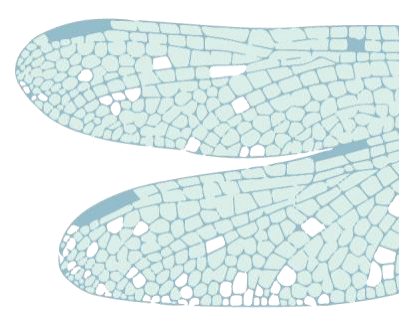
An inclusive culture exists when an organizational environment supports people with multiple backgrounds, mindsets, and ways of thinking to work effectively together and to perform to their highest potential (Baum, 2021). Culture can be



defined as ‘a pattern of shared assumptions’, workplace dynamics, shared practices, and values, and more colloquially as ‘the way we do things around here’ (Elias et al., 2018; Selzer & Foley, 2018). Many diversity and inclusion programs that are unsuccessful fail at least in part because they do not question the organization’s formal structures or the pre-existing organizational culture (Plotnikof et al., 2021). Organizations cannot simply complete a checklist and consider their EDI work “done”. Rather, the success of diversity and inclusion programs requires shifting workplace culture, and a commitment to continually learning, reflecting, and exploring how to identify and interrupt assumptions, biases, and microaggressions from oneself and others. There is no point at which an organization “arrives”, and no longer needs awareness around diversity and inclusion. Instead, organizations must be continually open to feedback and to listening and learning from those around them (Wong, 2019).

Overall, the literature suggests that a workplace culture that is supportive of and conducive to advancing EDI and related measures should:

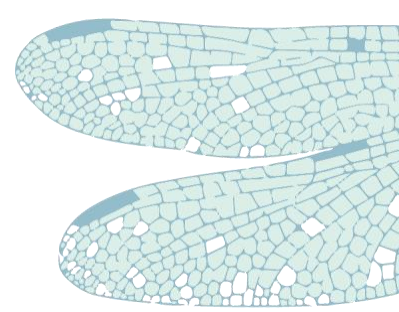
- **Model and expect mutual respect** (Hayes et al., 2020; Osler, 2021). This includes being explicitly intolerant of all discrimination, harassment, or mistreatment. This intolerance should be communicated through all training and upheld at all levels of the organization (Hayes et al., 2020; Robotham & Cortina, 2019).
- **Acknowledge, be appreciative of, and value diversity**, and the perspectives and contributions of all people (Arno et al., 2013; Burrows et al., 2021; Lingras et al., 2021). This can be done by including folks from various identity groups at all levels of the organization in decision-making, ensuring the time is taken to hear all perspectives, and making substantive organizational changes based on feedback from people who have historically experienced and/or continue to experience marginalization.
- **Foster open dialogue** where employees can share, listen, inquire, voice their opinions, and be listened to (Gebbers et al., 2020).
- **Be learning-centered** and grounded in, supported by, and continually evolve in response to, critical reflection (Arno et al., 2013; Fernando & Bennett, 2018). This can be supported by budgeting and designating specific times in the workday/week for personal critical reflection.
- **Be trauma-informed** (Baird & Alaggia, 2019; McCluney et al., 2017). This includes understanding and respecting potential triggers, as well as welcoming the expression of negative emotions. For example, news of police violence can be retraumatizing for Black employees, and workplaces should be mindful of these potential impacts. Organizations should strive to be safer spaces for conversations about these impacts, if desired, while also not forcing individuals to share beyond their comfort levels. Clearly



communicating that the workplace is one in which such difficult emotions and conversations are welcome, and allowing employees to express these emotions and have these conversations at their own pace and discretion, is important.

- **Use an intersectional lens** to help ensure that an individual's unique experiences are honoured by recognizing that different aspects of their identity intersect and result in different experiences and forms of privilege and oppression (Alfred et al., 2018; Lund et al., 2022; Wong, 2019). For example, the experience of being a Two-Spirit Indigenous man involves experiences and needs that are not captured by the experiences of queerness or Indigeneity alone, but rather occur because of the unique intersections of those identities (Lund et al., 2022).
- **Strive for cultural humility** (Levy et al., 2021; Walters et al., 2016), which includes several important dimensions (see Text Box 2 below for details).

Because organizations are microcosms of the greater systems in which they exist, privileged dominating identities are often taken-for-granted and shape the organization's structure and culture whether intentionally or not (Chow et al., 2021; Levy et al., 2021; Loosemore et al., 2012; Wong, 2019). An inclusive workplace culture must move away from privileging a narrow but powerful identity and social position, towards supporting all identities (Alfred et al., 2018; Arno et al., 2013; Lingras et al., 2021; Wong, 2019). The process of shifting workplace culture begins with assessing the current culture, which is outlined in the following section. Cultural change is necessary and is a long and slow process for establishing and supporting more inclusive workplaces (Oikelome et al., 2021).



Text Box 2: Cultural Humility in the Workplace

Cultural humility in the workplace involves:

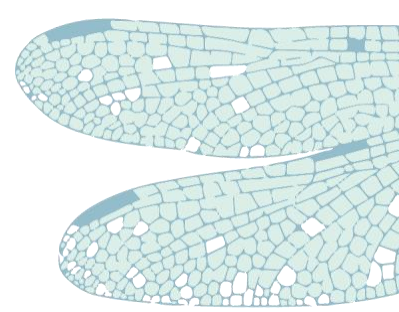
- Acknowledging differences that exist across *and within* cultures (Dean-Coffey et al., 2014; Walters et al., 2016);
- Recognizing that we can never be fully competent in cultures of which we are not members (Dean-Coffey et al., 2014);
- Engaging in lifelong learning (Dean-Coffey et al., 2014; Walters et al., 2016);
- Engaging in consistent critical analysis of one’s own biases and prejudices, the sources of these, and their impacts on others (Levy et al., 2021; Walters et al., 2016)
- Engaging with one’s own social position – one’s location along identity dimensions such as race, class, gender, age, etc. (Walters et al., 2016);
- Acknowledging the complexity of cultural identity; cultural groups are not static, people belong to multiple cultural groups (Dean-Coffey et al., 2014);
- Recognizing power dynamics; culture is not neutral, cultural groupings are ascribed differential status and power, with some holding privilege that they may not be aware of and some being relegated to the status of “other”; and
- Knowing that methods and tools used for collection, analysis, interpretation, and dissemination of data are not culture free – seeking to understand how these constructs are defined and experienced by and across cultures (Dean-Coffey et al., 2014).

Assessing Current Workplace Culture

Reflecting on current workplace culture is a common starting point for creating a shift towards a more inclusive workplace (Baum, 2021; Kelly et al., 2020; Levy et al., 2021; Page et al., 2021; Selzer & Foley, 2018). Selzer and Foley (2018) offer a guide for reflection on workplace culture and suggest that workplaces complete cultural audits at the beginning of their efforts towards transformational change.

According to them (Selzer & Foley, 2018, p. 285), the purpose of a cultural audit is to:

- “...Reveal how bias manifests within an organization’s informal and formal practices and cultural norms
- ...Use the voices of the people to reveal strengths and weaknesses in the [organization’s] culture”



- Examine the beliefs held by people within the organization;
- Help organizations “see who they are and who they want to be
- ...Help establish a clear rationale for building concrete diversity and inclusion outcomes into the organization; and
- ...Identify critical operations of power and influence within the organization, [such as] how decisions are made, how communication happens,” etc.

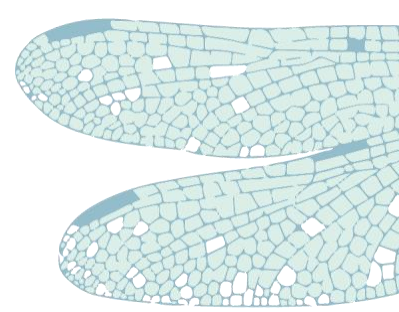
The authors detail two phases of a cultural audit: a survey to collect demographic information and existing perspectives on the workplace; and a participatory discussion in which results are shared, and a plan for change is developed through circle of action questions (Selzer & Foley, 2018). See Appendix C for a detailed explanation of the process.

The literature also points to the value of workplace climate surveys to help work towards foundations of trust and respect in an organization (Baum, 2021; Köllen et al., 2019). A climate survey is like a cultural audit but focuses specifically on gauging the morale of employees and whether they experience distrust, fear, or hostility in the environment. Baum (2021) recommends having an organizational consultant prepare and administer the surveys independently and in a neutral environment to allow for honest responses from employees. When gathering any form of feedback from employees, it is critical that organizations share results and concrete plans to address the feedback (Baum, 2021).

In the pursuit of organizational change, it is important for workplaces to understand both their current workplace culture, and their desired workplace culture. Organizational-level actions for supporting a culture of respecting and valuing equity, inclusion, and diversity are best upheld through explicit organizational policy, which is the focus of the next section.

Organizational Policy Supporting Safer Workplaces

Policies drive organizational life, and policy and practice transformations are fundamental and essential for advancing EDI (Anicha et al., 2020; Bajor et al., 2021; Castañeda et al., 2015; Kelly et al., 2020; Le et al., 2020). Policies and practices that support marginalized workers and inclusive workplaces should be put in place before employees need them, to ensure the onus is not on employees to initiate support processes (Kelly et al., 2020). Both the development and content of workplace policies need to be informed by, and intentionally supportive of, equitable, inclusive workplaces and practices.

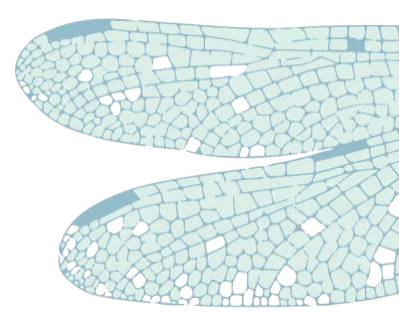


The development of workplace policies should proactively support inclusive workplaces (Bajor et al., 2021; Le et al., 2020; Oikelome et al., 2021). This means that policy development should:

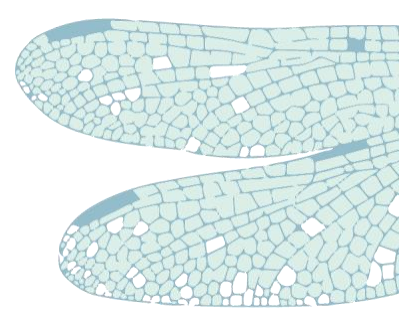
- happen **in collaboration with and informed by members across the organization** with diverse identities and social positions (Wong, 2019). All members' perceptions should be integrated into organizational policies and practices (Bajor et al., 2021; Le et al., 2020). Involving individuals who represent diverse, institutional interests, cultural backgrounds, and age groups in the institutional planning process is one way to support this recommendation (Bajor et al., 2021). If the current staff complement is not diverse, leaders can prioritize recruiting, hiring and training individuals with diverse backgrounds and identities;
- be **informed by an intersectional lens**, rather than distinct identity lenses (e.g., racial, gender, disability), as intersections of different systems of oppression can result in experiences that are overlooked by any single lens (see the definition of intersectionality in Appendix B for clarification). Existing and proposed policies should be audited to consider how they position particular individuals and groups (Blackmore, 2010; Castañeda et al., 2015). This could be done, for example, by an EDI committee;
- be **transparent in process** (Castañeda et al., 2015; Le et al., 2020). All employees should have access to information regarding how policies are developed, what is included, and what measures will be taken to ensure that established policies are being enacted (Pichler et al., 2017); and
- **include opportunities to solicit and respond to feedback** via a 360-degree feedback system that does not adhere to the institutional hierarchy. Feedback on policies should be sought from all workers, across all departments and levels, and be valued equally (Gebbels et al., 2020).

Once developed, workplace policies should ensure the equitable treatment of all employees and facilitate an inclusive organizational culture (Burrows et al., 2021). Meeting these requirements involves ensuring policies:

- **include explicit anti-harassment and discrimination statements.** Statements should emphasize zero-tolerance (Elias et al., 2018; Hayes et al., 2020; Kelly et al., 2020; McGuigan & Ghio, 2018) for discrimination, harassment, and bullying (Osler, 2021), including in cyber settings (D'Souza et al., 2019);
- include **positive practice models** contextualized to each workplace setting (Bowen et al., 2011);



- include an **explicit code of conduct** that defines concepts, provides examples, and highlights approaches to resolving grievances (see Textbox 3 for detailed recommendations on promising practices re: establishing complaint processes);
- require **tracking of diversity in the workplace via collection of disaggregated demographic information** for recruitment, selection, and promotion (Baum, 2021; Gray et al., 2019);
- include institutional **key performance indicators**, and **establish systems for monitoring** representation across all organizational levels (Gray et al., 2019);
- are **trauma-informed**. Policies should be designed with the recognition that trauma can take different forms, and multiple forms of trauma should be accounted for;
- afford and encourage the use of **Flexible Work Arrangements** by all employees (Castañeda et al., 2015; Gebbels et a., 2020; Murphy, 2018). Policy should explicitly recognize entitlements to leaves for a variety of reasons including time off for transgender folks transitioning (Elias et al., 2018) or for women experiencing domestic violence (DeJonge, 2016). Managers and workplace leaders should be well-versed on these leave entitlements so that they are equipped to support their employees when needed (Elias et al., 2018);
- **detail organizational efforts to minimize barriers to participation**, ensuring all individuals can access information and resources with ease. Knowledge of marginalized employees should be engaged to better understand barriers to participation, and then these barriers should be eliminated (Baum, 2021; Le et al., 2020);
- offer **days of cultural significance as additional holiday entitlement** (Loosemore et al., 2012);
- support and facilitate the visibility, recognition, protection, and **acceptance of queer employees** (Kelly et al., 2020); and
- include a **commitment to funding diversity and inclusion initiatives** via cultural audit, EDI committee/compensation for those developing and reviewing policy, training (Cumberland et al., 2021).



Text Box 3: Minimizing Barriers to Seeking Safety

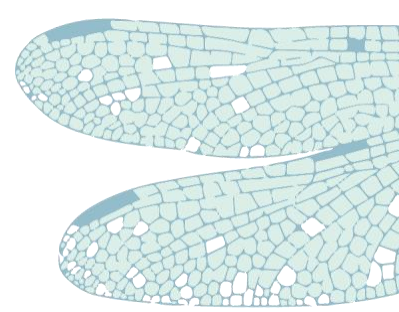
Minimizing the barriers an employee might face when trying to seek safety from discrimination or harassment is imperative to supporting safety in the workplace. To support the recommended zero-tolerance policies, a complaint process must be available to employees to seek safety in the event of mistreatment. Policies should be explicit about the complaint process to be followed in the event of harassment or discrimination. Elias and colleagues (2018) detail information that should be included in such policies, including:

- Explicit statements about what constitutes harassment and warrants a complaint;
- Explicit directions for the representatives in charge of the complaint process. More than one contact individual should be available to account for the possibility that the employee feels uncomfortable contacting one of the representatives;
- Direct links to the contact information of the representatives in charge; and
- A clear and explicit explanation of the complaint process so that employees know what to expect.

Equity, Diversity, and Inclusion Committees

To maintain an ongoing commitment to EDI and related practices, workplaces can establish EDI committees (Lingras et al., 2021; Stylianou et al., 2020). Some of these committees centre one dimension of identity (e.g., anti-racism), but the commitments are broadly similar to committees with a more intersectional focus, which we suggest helps to ensure that staff members' complex experiences are adequately considered. The literature on EDI committees focuses mostly on the academic context, where the main purpose is to foster a psychologically safe working and learning environment for a diverse body of faculty, staff, and learners (Lingras et al., 2021). This goal can be applied across organizational contexts, with the goal of fostering psychologically safe working environments for all members of an organization. Successful implementation of EDI and related policies to support inclusive and safer workplaces is time intensive. EDI and related work should not be treated as an afterthought, a task to get to if time allows, or an extra volunteer task to be undertaken outside of the workplace or workday. True commitment requires roles designed specifically to support the ongoing process of developing inclusive workplaces (Lingras et al., 2021).

EDI committees and/or related roles should not be expected to be voluntary; those involved should be properly credited for their time (Lingras et al., 2021). Stylianou

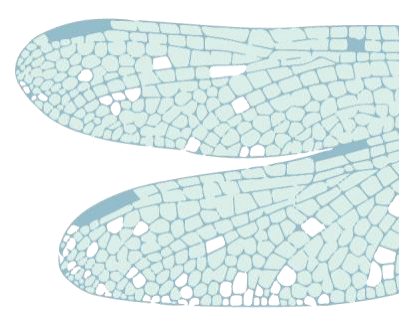


and colleagues (2020) describe their implementation of an Anti-Racism Steering Committee, which includes racially diverse staff representing different departments and programs, and different roles and levels in the organizational structure. Representation across a variety of identities should be the goal when putting together an EDI committee. Lingras and colleagues (2021) offer the following components of developing an EDI Committee:

- **Leadership support:** obtain approval, financial support, and commitment from department leadership.
- **Recruitment and membership:** Open invitation, members self-select. Goal to have representation across roles. If members do not self-select, people in leadership positions should try and learn why and then eliminate barriers to participation (e.g., by removing a project from someone’s workload so they have time to support the organization’s EDI work). Establish leadership and membership terms, meeting format, and logistics.
- **Purpose and guidelines:** assess current climate and needs, develop committee charges, norms, and guidelines.
- **Short- and long-term goals:** brainstorm activities and initiatives, develop “task-forces” with appointed leads.
- **Communication and collaboration:** Ensure the committee and its intentions are visible within the organization. Advertise activities and initiatives, collaborate with other groups – the goal is a cultural shift, where EDI is everyone’s responsibility (not just the committee).
- **Ongoing evaluation:** continually assess and plan accordingly.

If there is strong resistance to, or limited uptake on, the organization’s efforts to establish an EDI committee, the organization’s leadership should consider some of the other dimensions of EDI-related work (e.g., training, workplace culture) and how pursuing these could help advance broader organizational commitment and capacity for advancing EDI.

Finally, the position of Chief Diversity Officer is increasingly being created across universities and organizations. This can be an important leadership role, which can include responsibility for chairing/leading the organization’s EDI committee. This role should be filled by an individual who possesses a deep understanding of EDI and related concepts, and the barriers faced by groups who have experienced and/or continue to experience marginalization (see Appendix D for a more detailed list on qualities important in this role) (Worthington et al., 2014).



Promising Practices at the Leadership Level

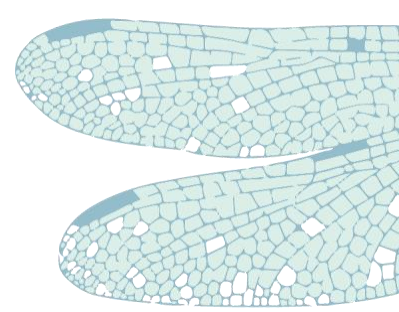
Leaders are necessary for advancing organizational change. Leaders set the tone of the workplace. Support for, and adherence to, inclusion-supportive policies and practices by leaders is essential to the success of those policies and practices (Alfred et al., 2018; Gray et al., 2019; Goldman-Schulyer et al., 2021; Lingras et al., 2021; Livne-Tarandach et al., 2021; Miller & Davis-Howard, 2022; Nicolaides & Poell, 2020; Oikelome et al., 2021; Page et al., 2021; Pichler et al., 2017; Schultheiss, 2021; Selzer & Foley, 2018; Žnidaršič et al., 2021). Further, the degree to which leaders understand how to lead inclusively has been described as perhaps the single biggest factor in creating and maintaining a culture where people feel respected, valued, and able to do their best work (Miller & Davis-Howard, 2022).

The literature provides many insights into how leaders can support the success of EDI and related practices in the workplace. We organize these insights around two themes: qualities or skills that a leader possesses, and actions that a leader can take that are conducive to supporting inclusive and safer workplaces. These lists are presented separately for clarity, but are intimately related. For example, leaders can take actions to develop specific qualities or skills.

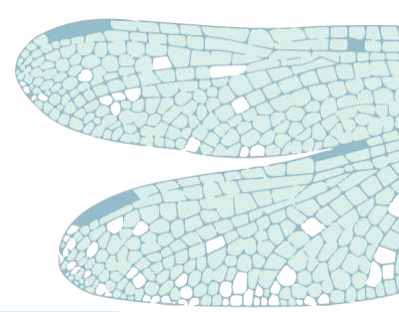
To support the success of EDI and related practices, a leader can:

- possess an **awareness of personal, social, and institutional biases** which may be influencing how policies are discussed and implemented (Borgkvist et al., 2021);
- **recognize the reality of systemic injustices** and therefore, the necessity of systemic changes for equity and inclusion (Chow et al., 2021);
- **embody the organization's values** and commitments to EDI (Pichler et al., 2017);
- have high **emotional intelligence** (Murphy, 2018);
- be able to anticipate, recognize, and **respond effectively** to opposition to introduced changes (Chow et al., 2021); and
- have a **growth mindset** (the belief that while there is a starting point with our natural talents and dispositions, these can be developed, cultivated, and improved through practice, discipline, and persistence) (Nicolaides & Poell, 2020).

To support the success of EDI and related practices, a leader can take the following actions:



- Actively shape the climate of their organization to endorse respect. Leaders should explicitly demonstrate support for EDI and related workplace policy. **Modelling acceptable social norms** is integral to this (Marchiando et al., 2021; Sekerka & Yacobian, 2018);
- Consistently **engage in critical self-reflection**, committing time to understanding oneself, the organization, and the employees (Duthie, 2018; Goldman-Schuyler et al., 2021; Yam & Skorborg, 2021);
- Actively **engage with dissenting and marginal voices**. Leaders are responsible for listening and ensuring all voices are being heard in the workplace (Cumberland et al., 2021; Trittin & Schoeneborn, 2015);
- Attend to the vision, mission, values, and policies of the organization. Leaders should **readily offer clarity about the intentions and directions of an organization**, prioritization of needs, deployment of resources, and the organization's vision. This includes communication around the EDI agenda, objectives, and progress, which is important for engaging employees in these endeavours (Livne-Tarandach et al., 2021; Page et al., 2021; Schultheiss, 2021);
- **Create a climate of psychological safety** where everyone feels welcome to engage in difficult conversations (Goldman-Schuyler et al., 2021; Nicolaides & Poell, 2020). This can be done by affirming the difficulty of certain conversations, affirming experiences and feelings of vulnerability, and compassionately holding all employees accountable in these conversations to ensure harm is not perpetuated;
- **Hold people accountable** for harassment, discrimination, and/or bullying, implementing consequences clearly detailed in policy, informed by employee voices (Hayes et al., 2020; Page et al., 2021);
- **Be transparent**, openly communicating about organizational actions, policies, and goals, especially those pertaining to EDI (Bajor et al., 2021);
- Be supportive of and **promote flexible working arrangements**, talking with employees about the use of flexibility as an option (Borgkvist et al., 2021);
- Offer recognition and reward to those who demonstrate social responsibility (Cumberland et al., 2021); and
- Strive to **embody a practice of cultural humility** (see Text Box 4, below, for details).



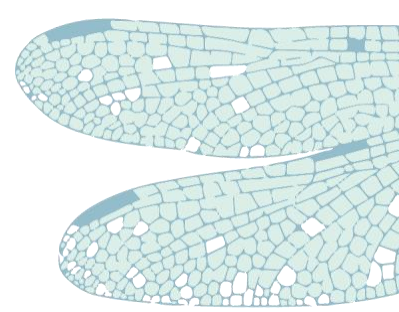
Text Box 4: Cultural Humility in Leaders (Gotsis & Grimani, 2016)

Cultural humility is a goal not only at the organizational level (as described above), but also at the individual level, and this begins with leadership. To embody cultural humility, leaders can:

- Strive for an accurate understanding of themselves and their limitations;
- Maintain an other-oriented stance that includes respect, openness, and humility;
- Show openness towards the cultural identity and experiences of group members;
- Demonstrate empathy and explore if group member(s) perceive them to be practicing cultural humility;
- Demonstrate skills in welcoming diversity of thought and expression in groups;
- Maintain an open mind and heart;
- Allow group members to teach them;
- Frame the possibilities for group members to gain useful perspectives and experiences from other members;
- Acknowledge explicitly that particular relationships and interactions resemble the differences between privilege and oppression;
- Recognize explicit and implicit mistakes and harm to others;
- Appreciate difficult, enlightening, and inspiring moments shared with group members; and
- Understand that practicing cultural humility is a lifelong process

Quality leadership must be supported at an organizational level. To support leaders in developing the above skills and qualities, and in successfully taking actions that are supportive of inclusive workplaces, organizations can:

- provide **professional development opportunities that help leaders understand their own identities** and develop an ethical consciousness about differences among individuals, which leads to an awareness of how they are positioned in the workplace in relation to “the Other” (Blackmore, 2010);
- provide **skill development opportunities** re: empathy, humility, creating psychological safety, open dialogue, and fostering adaptive leadership (Cumberland et al., 2021; Fernandez & Corbie, 2021). For example, workplaces may offer emotional intelligence training including communication exercises that can be rolled out in a “train the trainer” format (i.e., leadership can pass the skills on to employees) (Baum, 2021);



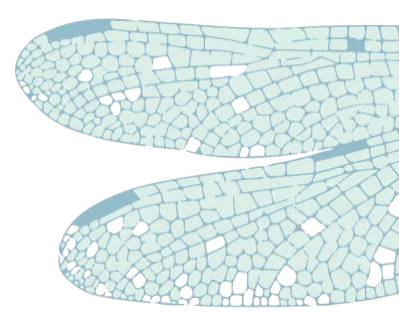
- offer such training and development opportunities in the form of three to four multi-day education sessions within an 18-month period, and ongoing (Miller & Davis-Howard, 2022); and
- design **reflective supervision structures** and training experiences that create space for staff to have courageous conversations about bias and lived personal and professional experiences with institutional oppression (Stylianou et al. 2020).

In addition to ensuring that leadership in the workplace is supportive of EDI and related practices, efforts should also be made to support the creation of a more diverse and inclusive leadership team. To advance this goal, organizations can:

- develop policies and practices that **intentionally create pathways that promote more diverse leadership** (Wong, 2019);
- **hire and promote more people from groups that have experienced and/or continue to experience marginalization** (Kelly et al., 2020; Wong, 2019);
- **address barriers that hinder opportunities to lead.** For example, if a woman is promoted to a leadership role in which she now finds herself as the only leader in the room, it is imperative this room be free of hostility (Wong, 2019);
- **provide monetary and other incentives** to make leadership positions more attractive to marginalized folks: equal pay, transparent salaries, equivalent amounts of family leave for men and women, and flexible working hours and locations (Schultheiss, 2021); and
- offer **leadership development programs** for marginalized folks (Gray et al., 2019).

Promising Practices in EDI Training

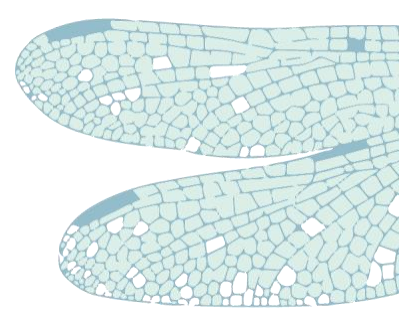
Training can be a valuable tool when striving for EDI and safer workplaces. In an organization that is working to address the systemic nature of racism, sexism, and other forms of discrimination, and to establish an inclusive workplace culture and organizational policies and practices, the incorporation of diversity training into overall training can be a critical component of transformational organizational change (Chow et al., 2021; Gebbels et al., 2020; Loosemore et al., 2012; Oikelome et al., 2021; Robotham & Cortina, 2019). It is imperative that diversity and related trainings are not implemented as a one-off solution to workplace discrimination (Oikelome et al., 2021). Before training begins, an assessment of the organization's needs and employees' current attitudes is important so that the content and delivery of the training can be intentionally tailored to the organization's unique position and context (Žnidaršič et al., 2021). This can be



achieved using cultural audit and workplace climate survey tools discussed earlier. I have organized the following literature-based recommendations for diversity training into three clusters: logistics, delivery, and content.

Logistics

- For new employees, **incorporate diversity training into the onboarding process**. Doing so establishes commitment to EDI as an important part of the organizational culture (Cumberland et al., 2021).
- For current employees, training should be **voluntary**. Mandatory training can have the opposite of the intended effect by provoking resistance and frustration in employees (Chow et al., 2021). Barriers to attendance should be reduced as much as possible, by offering training during regular working hours. Organizations should also adjust workload responsibilities to reflect time spent in training (i.e., employees should not be expected to complete their typical work-week tasks *in addition to* training).
- Training should be **on-going**. For example, initial training should be spread over time (e.g., two hours per week for four weeks). Given that EDI and related endeavours involve a commitment to ongoing learning and the recognition that this is a continual process, training should be returned to and maintained throughout employment (Baum, 2021; Cumberland et al., 2021).
- Training should be **available to those in remote locations**, using engaging online materials (Cumberland et al., 2021).
- Training should be **supported and endorsed by organization leadership**. Leaders can encourage attendance, and reduce other work tasks to account for time spent in training (Hayes et al., 2020).
- **Continually refresh** training in response to employee feedback and observations. Adjusting training in response to feedback is a way to demonstrate that the voices of employees are valued, and can make the process more relevant and engaging (Cumberland et al., 2021; Oikelome et al., 2021).
- During and after training, organizations should **monitor for organizational change and impact**, as well as impact on employees (Bajor et al., 2021; Oikelome et al., 2021).

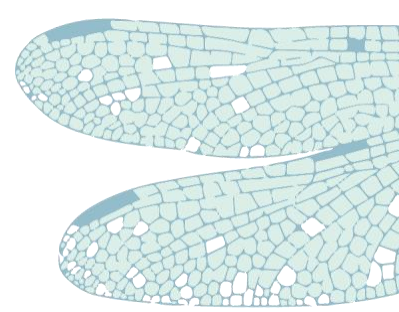


Delivery

- Provide **different training formats**. Offering a variety of means to learn material (video, audio, written) allows employees to engage through their preferred medium (Cumberland et al., 2021).
- Be **transparent about goals**, objectives and purpose, and key measures of success (Bajor et al., 2021; Oikelome et al., 2021).
- **Encourage and facilitate interaction** among learners, between individual learners and training content, and between individual learners and the facilitator (Bajor et al., 2021).
- **Engage outside experts** (Cumberland et al., 2021). Many folks have made it their life's work to educate others on marginalization and oppression. Engagement with properly compensated outside experts also reflects the organizations' commitment to EDI and related pursuits.
- Offer **spaces for participants to reflect and deliberate** on the experience (Mercado et al., 2022).
- Obtain employee **feedback** after training, to be incorporated into future delivery (Cumberland et al., 2021; Oikelome et al., 2021).

Content

- Training should cover a **wide range of topics** such as: rights and obligations of employees, anti-discrimination legislation, and strategies for dealing with workplace discrimination (Loosemore et al., 2012). If an organizational assessment (for instance, a cultural audit or climate survey) has been conducted before designing training, the topics covered can be tailored to the organization's needs and employees' current understandings of and relationships to EDI (Žnidaršič et al., 2021).
- **Socialize employees to deliver compassion** by noticing, interpreting, feeling, and responding to the suffering of their coworkers in the workplace. Training should encompass strategies for addressing emotional responses in an effective manner (Bajor et al., 2021; McCluney et al., 2017).
- Focus on **self-awareness** and the development of critical consciousness (Anicha et al., 2020; Walters et al., 2016).



- Emphasize **practical applications** of the content, specific to the workplace (Bajor et al., 2021).

Most of the literature did not provide specific details about the content and delivery of training. However, one method detailed was CREW training, described in Text Box 5 below.

Text Box 5: Civility, Respect, and Engagement at Work (CREW training)

This approach to training involves:

- collectively brainstorming about what counts as respectful and disrespectful behaviour;
- identifying areas of strengths and weaknesses in the workplace;
- participating in exercises to practice respectful behaviour;
- generating and implementing a plan of action to foster respect; and
- continually evaluating and modifying the plan as needed (Robotham & Cortina, 2019).

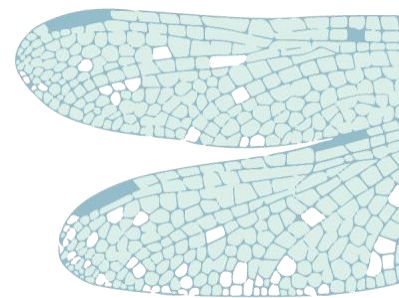
Cautions About EDI Work

The literature also discusses practices to be cautious of when engaging in EDI work. Here, I detail five practices to avoid.

Colourblindness

Organizations that want to truly create a safer space for all employees do not take what has been called a “colourblind” approach (Levy et al., 2021). Colourblind approaches act as if racism and racist structures only exist when they are intentionally constructed. This is an outdated and incorrect assumption, and it is now widely recognized that racism and oppressive practices are intrinsically woven throughout our current systems (Wong, 2019), even if unintentionally.

It is impossible to ignore different aspects of identity (such as race), and it is offensive to suggest that one does not see a salient part of another’s identity and experience as a person. This mentality reinforces the idea that things that make individuals different from each other are undesirable burdens to be tolerated at best (Wong, 2019). Rather, differences should be acknowledged, embraced, and supported.



Floating Cultural Holiday Policies

Floating cultural holiday policies give employees the option of trading official public holidays for a day that is of cultural significance to them. While well-intentioned, this approach is problematic because it requires employees to “trade” one identity for another. Instead, as recommended above, all employees can be granted days of significance as additional holiday entitlement (Loosemore et al., 2012).

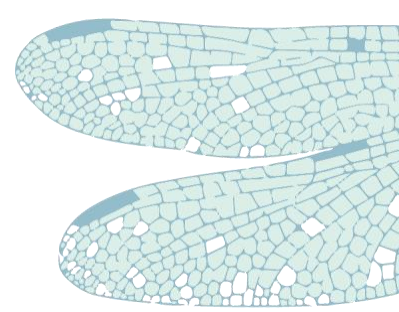
Tokenism

Tokenistic approaches claim to value all employees and respect varying cultural backgrounds, often making statements about such, but without challenging the systems that allow institutional racism to persist (Levy et al., 2021). This can result in practices such as hiring people of colour, Indigenous people, women, and others who have historically experienced, and continue to experience, marginalization, while simultaneously upholding the structures that marginalize and systematically disadvantage them. One way to think about avoiding tokenism is to recognize that employees from groups that have experienced and continue to experience marginalization should be given a *voice* at the table, not just a seat at the table.

For example, asking “Who else could be brought on board?” risks tokenizing different identities by treating diversity as a “numbers game”. It assumes that increasing the number of people who identify as members of marginalized groups would make an organization sufficiently more diverse. Without considering relative power, privilege, access, and influence, this is insufficient to meaningfully challenge existing systems (Levy et al., 2021). Instead, organizations should ask “Who is not represented at the proverbial table? In what ways have we kept some people out?” This way of thinking frames the commitment to be more equitable and inclusive. It begins the examination of possible exclusionary practices that would prevent people with diverse backgrounds and identities from being able to thrive and fully participate in shaping an organization (Levy et al., 2021; Wong, 2019).

Pursuit of Cultural Competency

Although pursuing knowledge and awareness of other cultures is valuable, cultural competency as a goal is limiting because it implies that learning has an endpoint rather than being continuous (Levy et al., 2021; Nissen & Curry-Stevens, 2018).

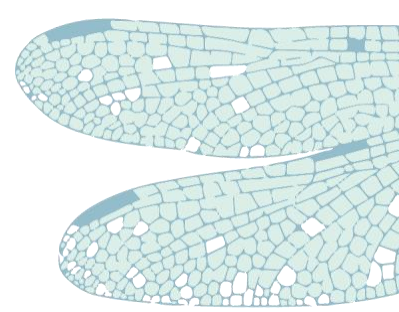


Culturally competency can be considered a narrow and tokenistic pursuit (Duthie, 2018). The goal of “achieving” cultural competency is laden with the assumption that culture is static and can be learned or even mastered by those outside it and tends to downplay the rich diversity within cultural groups (Walters et al., 2016). Instead, organizations should strive for cultural humility, as detailed throughout the report (see Text Box 2: Cultural Humility in the Workplace, and Text Box 4: Cultural Humility in Leaders, for more details).

Requiring Undue Emotional Labour from Marginalized Employees

While several of the recommendations included in the report involve learning from the experiences of marginalized folks (see for example Text Box 1: Consciousness Raising Experiences), it is imperative that undue labour is not placed on employees from groups who have historically been – and often continue to be – marginalized (Cumberland et al., 2021; Lingras et al., 2021). Marginalized employees may be invited, but should not be expected, to use their personal experiences and vulnerabilities as an educational tool for others. Alternatives include books, professional speakers, and workshops. Organizations can turn to purposefully developed materials to access these lessons. Outside knowledge and perspectives can contribute value to training experiences (Cumberland et al., 2021). As part of their commitment to EDI, organizations can compensate individuals with expertise in the experiences of people who experience marginalization.

Throughout the report, the importance of employee feedback and responding to employee’s voices has been emphasized. Organizations should solicit feedback from all employees and should heed the insights shared by employees from groups who have historically been, and continue to be, marginalized. This is distinct from the caution above, in which employees who experience marginalization are expected to use their experiences as teaching material for others. When providing feedback and sharing ideas, there is no requirement of employees to share their vulnerabilities – rather, they can share experiences and insights on the workplace to the extent they feel comfortable. As well, these are shared to inform the organizational policy and arrangement, as opposed to being shared widely throughout the organization as a tool for educating others.



Conclusion

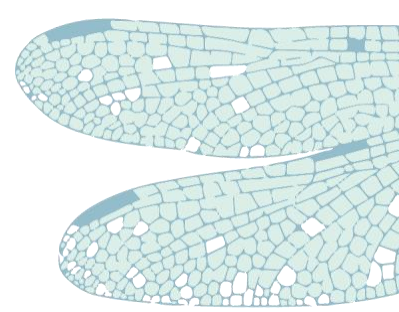
Perhaps one of the most important insights gleaned through this scoping review is the importance of committing to EDI efforts – including the development of safer spaces – as an ongoing endeavour. The goals of this endeavour should evolve in response to newer insights and feedback from employees. This kind of ongoing commitment to EDI lays the foundation upon which transformational change can begin.

Promising practices in pursuit of EDI begin with organizations willingly questioning their existing structure and organizational culture. With a critical understanding of the current workplace culture, organizations can take strides towards a more inclusive, safer work environment for all. EDI efforts are also most effective when they begin with responding to the experiences of those who have experienced, and continue to experience, marginalization. Knowledge and experiences of marginalized employees are essential for driving workplace change. Organizations must provide meaningful feedback and participation opportunities for employees. The insights yielded from these conversations should inform the organization’s vision, policy development, training, and evaluation practices.

Safer workplaces require organizations to be explicitly intolerant of harassment, discrimination, and mistreatment. This intolerance should be espoused at the organizational level, integrated into policy, enforced at the leadership level, and communicated clearly in EDI, and all training.

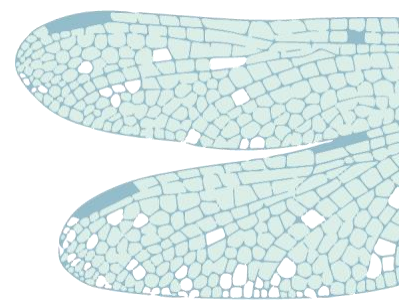
Training related to diversity and inclusion should never be treated as a one-off effort. Just like at the organizational level, commitment to establishing and maintaining safer, more inclusive workplaces requires ongoing self-reflection and awareness. The delivery of training should reflect this. EDI training should emphasize self-awareness and facilitate the development of a critical consciousness in employees, such that the pursuit of safer workplaces becomes a task that all employees are actively contributing to.

This report offers Calian current insights drawn from academic literature about promising practices related to EDI initiatives and creating “safer spaces” in the workplace. The report offers insights and recommendations for promising practices at the organizational level, leadership level, and in training, and seeks to demonstrate that these practices are intimately connected and mutually reinforcing.

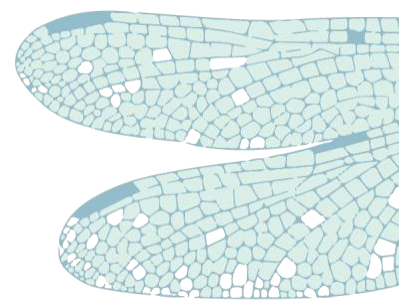


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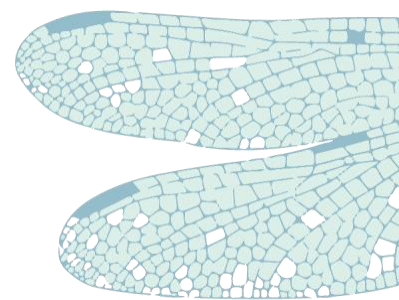
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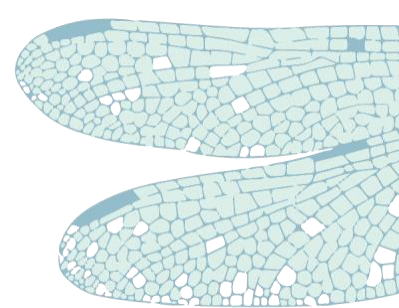
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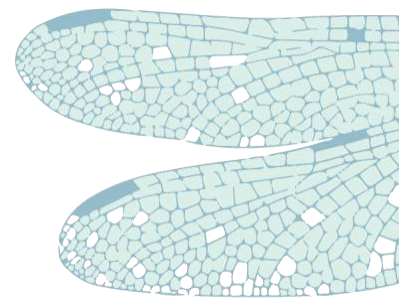
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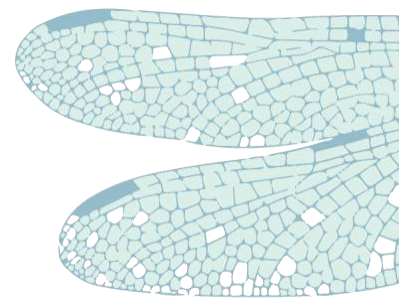
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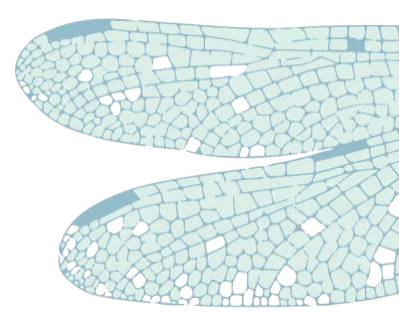
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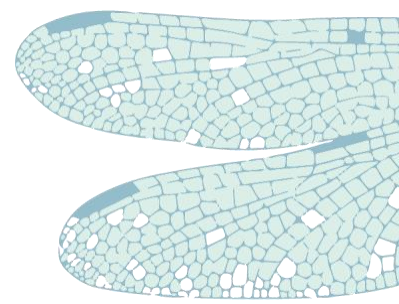
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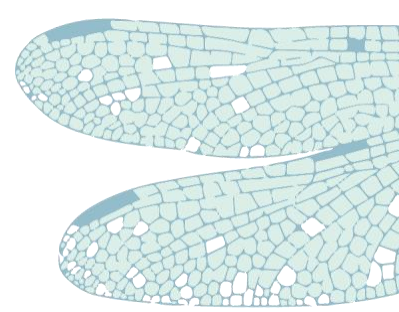


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Appendix A: Search Strings

Search Line 1	Search Line 2	Database
Workplace AND safe	trauma-informed OR "trauma informed"	ABI/Inform, Sociological Abstracts
Workplace AND safe	antiracis* OR anticolonial* OR anti-racis* OR anti-colonial* OR ("anti racism" OR "anti racist" OR "anti racists") OR ("anti colonial" OR "anti colonialism" OR "anti colonialist" OR "anti colonialists")	ABI/Inform, Sociological Abstracts
Workplace AND safe	GBA+ OR intersectional*	ABI/Inform, Sociological Abstracts
Workplace AND safe	"equity, diversity and inclusion"	ABI/Inform, Sociological Abstracts
Workplace AND safe	"diversity, equity and inclusion"	ABI/Inform, Sociological Abstracts
Workplace AND safe	antioppress* OR anti-oppress* OR "anti oppression" OR "anti oppressive"	ABI/Inform, Sociological Abstracts
Safe Spaces	Work	PSYCInfo
Work	"equity, diversity and inclusion"	PSYCInfo
Work	"diversity, equity and inclusion"	PSYCInfo



Appendix B: Glossary

Ageism: Stereotyping, prejudice, and/or discrimination against people based on age (Bajor et al., 2021).

Anti-racist: An approach that not only demonstrates a commitment to diversity but actively examines the unequal power dynamics within an organization and incorporates cultural humility into practice. Anti-racist organizations acknowledge that systemic racism influences their organizational structure and policies. By critically evaluating their structures, anti-racist organizations seek to shift active racist systems to become more equitable and work to create access for those whom the system typically excludes (Levy et al., 2021).

Benevolent sexism: A chivalric attitude that views women as praiseworthy, yet incompetent, and thus supports male dominance and rape supportive attitudes. It includes the beliefs that women need men’s protection (protective paternalism), that only women can fulfill the romantic needs of a man (heterosexual intimacy), and that women are morally superior to men (complementary gender differentiation) (Kilmartin et al., 2014)

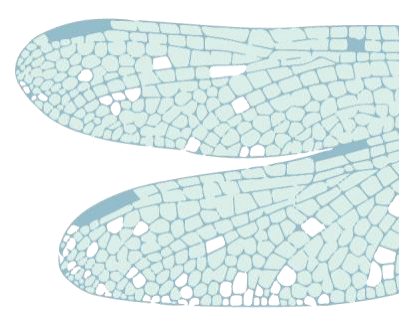
Cisnormativity: The perception that only being cisgender is normal and natural (Kelly et al., 2020)

Critical reflection: Questioning what we, and others, might be taking for granted – what is being said and not said – and examining the impact this has or might have both on action and in action (Nicolaidis & Poell, 2020).

Cultural competence: The Idea that the path to addressing racial and cultural divides is to acquire knowledge and awareness about said race or culture. See “practices to be cautious of” in report for explanation of the problematic nature of this pursuit.

Cultural humility: An emergent concept without a consistent definition, but including the following common themes:

- An “other-oriented” stance that seeks to develop mutual partnerships that address power imbalances with interpersonal respect (Upshaw et al., 2020);
- A lifelong commitment to openness to new cultural information, critical self-examination of cultural awareness, and motivation to learn from others (Upshaw et al., 2020; Levy et al., 2021);

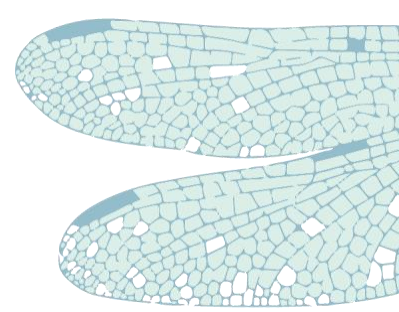


- A value that guide's interactions, an ongoing pattern of behaviour rather than a terminal achievable outcome (Levy et al., 2021);
- An acknowledgement that meaningful differences exist across different cultures (Levy et al., 2021);
- An understanding that we can never be fully competent in cultures of which we are not members. (Levy et al., 2021);
- A commitment to engaging in consistent critical analysis and self-reflection of one's own biases and prejudices, the sources of these, and the impact they may have on others (Levy et al., 2021); and
- An appreciation of our own social position (one's location along the dimensions of race, class, gender, age, etc.) (Walters et al., 2016).

Cyber abuse: An umbrella term that encompasses abusive interpersonal behaviours that take place in a virtual environment, including online bullying, stalking, sexual solicitation, and problematic exposure to pornography (D'Souza et al., 2020). More specific related definitions include:

- **Cyberbullying:** Includes unwanted or hostile behaviours that may be repeated and can harm, threaten, or demoralise the recipient.
- **Cyber discrimination:** Includes behaviour that is prejudiced or biased against your age, race, ethnicity, nationality, gender, sexual orientation, disability, religious or spiritual beliefs, marital or family status, employment status or political opinion.
- **Cyber-sexual harassment:** Includes inappropriate or unwanted comments that are sexually offensive or have a sexual connotation; unwanted sexual solicitation; promises of better treatment (implied or explicit) in exchange for sexual activity; threats of differential treatment (implied or explicit) if sexual activity is not offered; problematic exposure to pornographic material.
- **Cyber stalking:** Includes stalking, harassing, intimidating, or undertaking other threatening behaviours (D'Souza et al., 2020).

Decolonization: A process whereby non-Indigenous people critically analyze the historical and ongoing consequences of colonization with the goal of decolonizing their minds, hearts, bodies, and spirit (Fernando & Bennett, 2018) – to create space in everyday life, research, academia, and society for Indigenous perspectives without them being neglected, shunted aside, mocked, or dismissed. Note that many Indigenous Peoples and scholars suggest that decolonization ultimately requires a commitment to returning stolen land. In an organizational context, commitments to anticolonialism, which emphasizes dismantling colonial values and structures, might be more appropriate.



Discrimination: Treating someone differently or unfairly because of a personal characteristic of distinction which, whether intentional or not, has an effect that imposes disadvantages not imposed on others, or that withholds or limits access that is given to others (Mellifont, 2021).

Diversity: Representation of difference across various identity dimensions including race and ethnicity, gender identity, gender fluidity, neurodiversity, sexual orientation, mental illness, disability, socioeconomic status, spiritual/religious beliefs and their intersections (Baum, 2021; Costigan et al., 2020; Lingras et al., 2021; Murphy, 2018; Selzer & Foley, 2018; Wong, 2019). the extent to which an organization has people from diverse backgrounds or communities involved as board members, staff, or volunteers (Arno et al., 2013).

Equality: Generally associated with assumptions of sameness; that what is fair is to treat everyone the same way. This exacerbates and reproduces inequalities, because it actively obscures and denies relevant differences, including how different groups have historically been treated (Wong, 2019). Instead, organizations should strive for equity.

Equity: Ensures that everyone has access to the same opportunities (Lingras et al., 2021). Equity is sometimes colloquially described as “levelling the playing field”. It is a relative form of equality that takes into consideration the needs and characteristics of individuals, the context of the situation, and the circumstances that result in disparate outcomes (Baum, 2021). Equity involves recognizing that certain groups of people have experienced (and continue to experience) disproportionate hardship, harm, and disadvantage, and takes measures that respond to their different needs (Lingras et al., 2021).

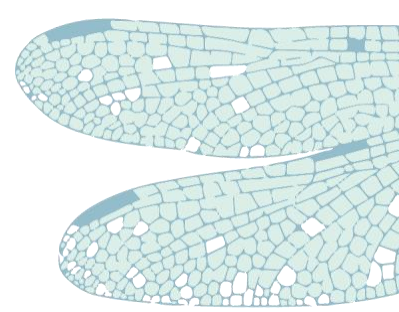
Harassment: Negative interpersonal interactions in the workplace involving unwanted behaviour that is engaged in by one or more employees and which affects one or more other employees (Turpin et al., 2019).

Heteronormativity: The assumption that heterosexuality is the only normal and natural sexual identity (Kelly et al., 2020).

Hostile sexism: An outright antipathy toward women (Kilmartin et al., 2014).

Identity-safe cues: Also known as “diversity cues” – signals within institutions that suggest individuals’ identities will be valued and help alleviate social identity threat and encourage belonging (Burrows et al., 2021).

Inclusion: Describes an unconditional sense of belonging in a group or an organization – a feeling of being valued which results in empowered participation (Lingras et al., 2021). It includes the extent to which each person in an organization feels welcomed, respected, supported, and valued as a team member (Murphy, 2018). Inclusion happens through the meaningful incorporation and integration of employees’ differences into daily practices (Geiger & Jordan, 2014; Le et al., 2020; Wong, 2019), and by ensuring that people with different identities



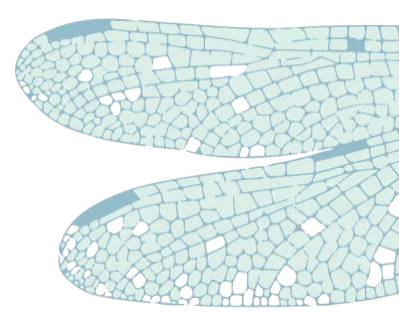
can fully participate in all aspects of the work of an organization, including holding leadership positions, and influencing decision-making processes (Baum, 2021; Lingras et al., 2021; Selzer & Foley, 2018).

Intersectionality: Emerging from Black feminism and critical race theory (Alfred et al., 2018), intersectionality aims to understand how peoples' experiences are shaped by interactions between aspects of their identity (e.g., race and gender, sexual orientation and age, race and disability) and systems of power (e.g., colonialism, sexism and heterosexism, racism). People can be harmed, and peoples' experiences can be missed, minimized, misunderstood and/or overlooked when we only pay attention to one dimension of someone's identity (Baum, 2021; Lund et al., 2022; Selzer & Foley, 2018). For instance, if an organization is reviewing its policies through only a race-informed lens, they may fail to account for the experiences of Black women (whose experiences are shaped by racism *and* sexism *and* their interactions), or gay Black men (whose experiences are shaped by homophobia and heteronormativity, racism, *and* toxic masculinity *and* their interactions). An emphasis on intersectionality refers to the need to understand identities as *interactive*, rather than additive (Linder & Rodriguez, 2012; Schultheiss, 2021; Trittin & Schoeneborn, 2015).

Microaggressions: Everyday derogations, slights, and invalidations that are often delivered to people of minority or marginalized backgrounds (Levy et al., 2021; Robotham & Cortina, 2019). Verbal, behavioural, or environmental indignities, whether intentional or unintentional, that communicate hostile, derogatory, or negative racial slights and insights toward People of Colour (Robotham & Cortina, 2019; Upshaw et al., 2020).

Psychological safety: The sense that individuals are free to focus on collective goals and problem prevention rather than self-protection because they are free from threat of harassment, discrimination, or mistreatment (Nicolaidis & Poell, 2020). Psychological safety indicates that an employee can safely engage in interpersonal risks in the workplace and in their work team. The presence of psychological safety helps to explain why employees share their knowledge and concerns at work. Psychologically safe work environments increase an individual's sense of belonging, assuring people feel "welcomed, supported, and valued" (McCluney et al., 2017).

Race: Commonly defined as a group of people that share certain, often distinctive physical traits. Race is typically considered a social construct because race categorizations have shifted over time, and there is little genetic variation across human beings with different skin colours, which is often the visible marker used to identify race. Despite its socially constructed nature, it has a tangible impact, because it has often been used to characterize people and suggest inherent superiority and more humanity for White bodies (Levy et al., 2021).



Racism: A by-product of racial classification, racism is the combination of racial prejudice (i.e., discriminations based on assumptions about one's race) and power disparity (i.e., authority afforded to a majority group through social practices and structures). Racism manifests in myriad ways, including through social and political exclusion, discrimination, violence, and the domination of one race over another through oppression, slavery, genocide, colonialism, and other forms of mistreatment (Levy et al., 2021).

- **Structural Racism:** The ways that history, culture, public policy, institutional practices, and personal beliefs interact to maintain a racial hierarchy (Gulati-Partee & Potapchuk, 2014).
- **Systemic Racism:** Recognizing that all of us, whether we want to or not, are participants within a system in which our racial membership has implications for important life outcomes (Chow et al., 2021).

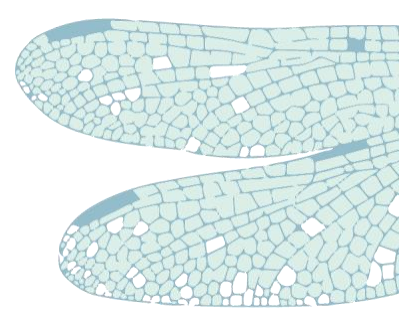
Racial trauma: Refers to psychological injury caused by the experience of a racially motivated incident that overwhelms a person's capacity to cope, causes bodily harm, or threatens one's life integrity. A racially traumatic event (such as police brutality towards Black people) may be experienced firsthand or vicariously through observation, in which a person identifies with the victim because of their shared identity (McCluney et al., 2017).

Rape supportive attitudes: Includes beliefs that: victims are to blame for rape by inviting the perpetrator's (usually a man's) attention, being intoxicated, or behaving provocatively; people (usually women) cannot be raped without cooperating; people are aroused by being forced into sexual activity; and that victims often "cry rape" to save face after engaging in sex willingly but later regretting their actions (Kilmartin et al., 2014).

Sanism: The specific prejudice, stigma, and discrimination associated with mental illness, largely invisible and socially accepted (Mellifont, 2021).

Sexual and gender harassment: Behaviour that derogates, demeans, or humiliates an individual based on that individual's sex (Robotham & Cortina, 2019). A multidimensional construct with three interrelated yet distinct factors: sexual coercion, unwanted sexual attention, and gender harassment.

- **Sexual Coercion:** Occurs when the perpetrator makes job-related threats or bribes to extort sexual favours.
- **Unwanted sexual attention:** Unsolicited and repeated acts of sexual pursuit that the recipient finds offensive or unwelcome (e.g., pressuring a colleague for dates, despite discouragement, or touching someone in a sexual way without their consent).
- **Gender harassment:** A "put-down" – insulting, hostile, and degrading behaviours and comments that are gendered in nature. Can convey sexist



hostility (e.g., sexist jokes, misogynistic name-calling, and masculinity slurs) or sexual hostility (making sexually offensive gestures and displaying obscene photos) (Robotham & Cortina, 2019).

Social justice: Generally concerned with identifying and enacting what is fair, equitable, and right for members of society (Livne-Tarandach et al., 2021).

Transformative learning: The revision of a frame of reference, which is a structure of assumptions and expectations that informs an individual's point of view and influences their thinking, beliefs, and actions (Nissen & Curry-Stevens, 2012).

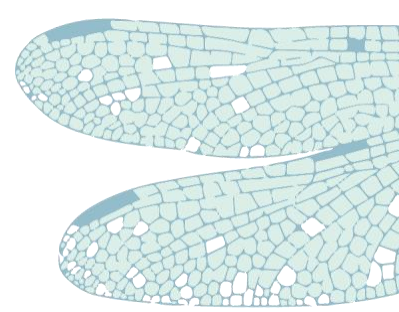
Trauma: Occurs when one loses the sense of having a safe place to retreat to within or outside oneself to deal with frightening emotions and experiences – a soul-wound that fractures one's ability to relate to the self, others, and the environment (Fernando & Bennett, 2018).

- **Intergenerational Trauma:** Historical trauma in which the collective emotional and psychological injury experienced by a group of people is subjectively remembered and experienced by both individuals and the community of later generations (Fernando & Bennett, 2018).
- **Retraumatization:** The triggering of symptomology in response to exposure to new traumatic material reminiscent of initial traumatic events (Fernando & Bennett, 2018).

Trauma-informed services: By being aware of the trauma histories of people and staff, organizations can create a service that is 'hospitable and engaging' (Bowen et al., 2011).

Workplace bullying: A persistent pattern of unwelcome conduct that a reasonable person in the same circumstances would consider unreasonable. Workplace bullying includes behaviour that is belittling, intimidating, humiliating, offensive, or disempowering. It must have the cumulative purpose or effect of harming an employee's health, reputation, career success, or ability to perform (Osler, 2021; Turpin et al., 2019).

Workplace incivility: Low-intensity deviant behaviour with ambiguous intent to harm the target, in violation of workplace norms for mutual respect. Uncivil behaviours are characteristically rude and discourteous, displaying a lack of regard for others (Dean-Coffey et al., 2014; Turpin et al., 2019)



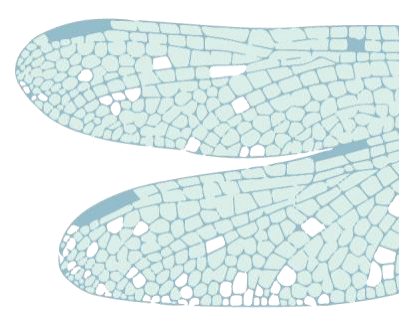
Appendix C: Details on Workplace Cultural Audits

A workplace cultural audit is a valuable way of gathering insights on the current workplace culture, and on ways to move towards a more inclusive culture. First, the organization should discuss the process with employees to help them understand the nature of it, how results will be shared, and why it is important. Throughout the audit, facilitators guide participants to help them develop actionable solutions to issues that are surfaced. Selver and Foley (2018) offer a detailed description of a cultural audit. A summary of the process is included here. This is a useful example for guiding an organization's work. However, implementing a cultural audit will likely require organization-specific adaptations.

Phase 1: Employee Survey

In Phase 1, a quantitative survey is used to provide the organization with information about how its culture is perceived, and to serve as the basis for the second phase. The second phase uses a qualitative, participatory, discussion-based approach. The survey should include:

- Demographic information (Note: When collecting demographic information, allow participants to select more than one option (i.e., for race, 'person of colour' and 'Indigenous'). Limiting a respondent's selection to one option can lead to identity erasure of multiracial and multiethnic respondents (Levy et al., 2021).
- 5-point Likert scale questions (1 = strongly disagree, 2 = disagree, 3 = neutral, 4 = agree, 5 = strongly agree) beginning with "I believe [...]" and followed by prompts to capture employees' perspectives on their working environment, relationships, individual experiences, hiring and representation, leadership and organization, and diversity and inclusion training. Examples of statements include:
 - Work culture (environment): I believe [my organization] goes beyond tolerance for people's differences and towards acceptance.



- Work culture (relationships): I believe most people at [my organization] are open to having their assumptions challenged.
- Work culture (individual experiences): I believe my colleagues within [my organization] value my work.
- Hiring and representation: I believe [my organization] staff represent diverse gender identities (male, female, transgender, other self-identified forms of gender expression)
- Leadership and organization: I believe I am included in decision making at [my organization].
- Diversity and inclusion training: I believe [my organization] has helped me develop the skills to help address diverse team conflicts.

Phase 2: Participatory Action Research (Discussion)

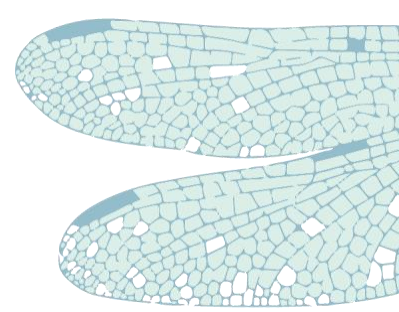
This phase can be facilitated by members of the organization’s Diversity and Inclusion Committee (see: EDI Committees for more info on this as a recommended practice) if one exists. Alternatively, the organization’s leadership team can guide this work. Phase 2 involves two stages.

Stage 1: Results Sharing

- Participants are invited to attend one of three results-sharing meetings (attendance not required).
- Results are shared via email in advance which enables participants to be better prepared to engage in dialogue.
- Sessions begin with conversational ground rules.
- Participants are invited to comment or just listen.
- An assigned notetaker documents comments from all participants.

Stage 2: Circle of Action Questions

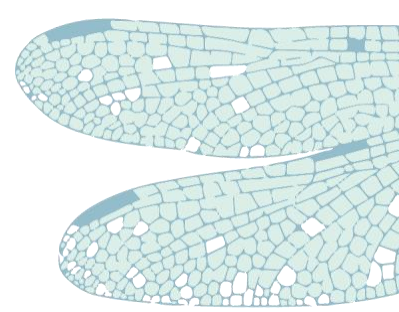
The goal of this stage is to continue to create a sense of community while taking ownership for co-constructing actionable solutions to move the organization forward. This should serve as a place to listen to others’ perspectives on



organizational dynamics, speak authentic truths, and decide how to translate ideas into action. Participants are invited to one of four circle of action meetings, to discuss the themes that arose during stage 1. Themes for discussion could include:³

- work culture that incentivizes individualization over collaboration based on centering reappointment
- promotion and tenure (RPT) criteria
- how to overcome the lack of trust in relationships
- how to treat each other with respect and gain skills to address conflict in a healthy manner
- how to ensure hiring of a diverse workforce
- the need for more transparency from leadership and inclusion in decision making
- incentivizing and rewarding diversity and inclusion training
- the possibility of a mentoring program
- cliques

³ These themes evolved from the results of the survey and the commentary during the results sharing stage in the example offered by Selver & Foley, 2018. A cultural audit in a different organization may result in a focus on different themes.

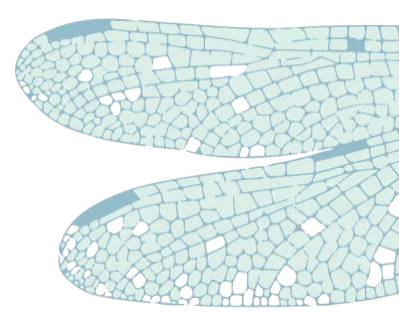


Appendix D: Chief Diversity Officer Position

Increasingly, positions of Chief Diversity Officer are being created in universities and organizations. Worthington and colleagues (2014) detail the following standards for someone in this role in an academic setting:⁴

1. Can envision and conceptualize the diversity mission of an institution through a broad and inclusive definition of diversity.
2. Understands, and can articulate in verbal and written form, the importance of equity, inclusion, and diversity to the broader educational mission of higher education institutions.
3. Understands the contexts, cultures, and politics within institutions that impact the implementation and management of effective diversity change efforts.
4. Has knowledge and understanding of, and is able to articulate in verbal and written form, the range of evidence for the educational benefits that accrue to students through diversity, inclusion, and equity in higher education.
5. Understands how curriculum development efforts may be used to advance the diversity mission of higher ed. institutions.
6. Understands how institutional programming can be used to enhance the diversity mission of higher education institutions for faculty, students, staff and administrators.
7. Understands the procedural knowledge for responding to bias incidents when they occur on college or university campuses.

⁴ While this list is specific to academic institutions, the abilities and understandings suggested could be adapted other organizational settings (e.g., point 2 could be adjusted to: “Understands, and can articulate... to the broader organizational mission”).



8. Has a basic knowledge of how various forms of institutional data can be used to benchmark and promote accountability for the diversity mission of higher ed. Institutions.
9. Understands the application of campus climate research in the development and advancement of a positive and inclusive campus climate for diversity.
10. Broadly understands the potential barriers that faculty face in the promotion and/or tenure process in the context of diversity-related professional activities.
11. Has current and historical knowledge related to issues of non-discrimination, access, and equity in higher education.
12. Has awareness and understanding of the various laws, regulations, and policies related to equity and diversity in higher education.

Appendix E: Table of Promising Practices

Practice	Level of Implementation		
Explicit intolerance of discrimination, harassment, or mistreatment	Organization	Leadership	Training
Written into policy, procedure, and contracts, including details on accountability	Yes	N/A	N/A
Responding appropriately to instances of discrimination, harassment, or mistreatment, holding employees accountable for their behaviour	N/A	Yes	N/A
Clear communication of this intolerance	N/A	N/A	Yes
Self-awareness and reflection	Organization	Leadership	Training
An awareness of the organization's social position, reflection on workplace power dynamics, systemic manifestations of oppression, and ways to strive for a more inclusive and equitable workplace	Yes	Yes	N/A
Providing appropriate amounts of time during working hours for members of the organization to engage in reflection, fostering their own self-awareness	Yes	Yes	N/A
Develop awareness of one's own social location and how this shapes workplace experiences and interactions, and how these experiences may be different for others.	Yes	Yes	Yes
Transparency	Organization	Leadership	Training
Around goals and intentions, recruitment, hiring, onboarding, and promotion practices	Yes	N/A	N/A
Around implementation of practices – origins, intentions, expectations, and monitoring	N/A	Yes	N/A
Around training development, intentions, goals, and expectations	N/A	N/A	Yes
Flexible Working Arrangements (FWA)	Organization	Leadership	Training
Ensure FWA are incorporated into workplace policy	Yes	N/A	N/A

Encourage employee uptake of FWA to their benefit	N/A	Yes	N/A
Brief employees on FWA available in the workplace	N/A	Yes	Yes
Be trauma-informed	Organization	Leadership	Training
Develop policies with a trauma-informed lens	Yes	N/A	N/A
Engage with employees with a trauma-informed lens, with an awareness of potential triggers and a thorough understanding of appropriate support resources	N/A	Yes	N/A
Provide training through a trauma-informed lens, with an awareness of potential triggers and appropriate responses and support resources available	N/A	N/A	Yes
Funding and resources	Organization	Leadership	Training
Prioritize funding to support ongoing engagement in learning and reflection opportunities	Yes	Yes	N/A
Allocate adequate funding to commit to and follow-through on EDI initiatives, including audits, training, and compensating educators	Yes	Yes	Yes
If establishing an EDI committee (recommended), ensure adequate funding is available to compensate for time spent; this should not be voluntary	Yes	Yes	N/A