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canadian institute of ecology and evolution
institut canadien d'écologie et d'évolution

Stage-based Assessments of Grants for EDI (SAGE) Toolkit

Produced by the 2020 Canadian Institute of Ecology and Evolution Special Topic Working Group

The Stage-based Assessments of Grants for EDI (SAGE) toolkit aims to support efforts by funding agencies to increase equity, diversity and inclusion (EDI) in their grant processes for early-career researchers in ecology and related STEM fields. Funding is a critical factor at the early-career stage (e.g., graduate, postdoctoral levels) that can influence whether individuals can pursue a career in their field and also what that career might look like. However, early-career researchers who are black, indigenous, and people of colour (BIPOC) or from other historically under-represented racial backgrounds and marginalized identities have been systematically under-served, under-resourced, and under-funded. By increasing EDI in grant processes, deserving early-career researchers have a greater chance at securing funding and establishing fruitful and satisfying careers in their chosen fields.

The SAGE toolkit identifies 4 stages of the funding opportunity (Advertisement, Application, Review, and Awarding) and provides stage-specific considerations posed in the form of questions, justifications, and recommendations for advancing EDI efforts. Questions and recommendations are intended to facilitate iterative assessments and improvements over multiple funding cycles. This toolkit was motivated by racial inequalities observed among recent cohorts of ecology-related early-career grants in North America, but is also applicable to supporting other axes of identity, especially because intersectionality (i.e., the combination and overlapping of multiple components of identity and thus also potential forms of discrimination such as racism, sexism, ableism, and classism) can further disadvantage applicants from equitable consideration.

This toolkit is geared for implementation by funding agencies, and grant-makers, and decision makers. Considerations in **bold** are especially important for EDI, while all considerations are valuable for increasing accessibility and transparency. Considerations with an (*) may require knowledge available only to those working within the funding agency; other considerations may be assessed with publicly available information online. The toolkit draws from existing guidance for equitable grant-making and expert solicitation of professionals in ecology and related fields, across multiple axes of identity including age, gender, race, ethnicity, stage in career, and experiences with applying for and/or facilitating funding opportunities.

Increasing EDI among grant recipients is a complex issue for which there is no single strategy or action to address the current lack of representation among ECRs. While we have made an effort to make the document as concise as possible, efforts to increase EDI require continued work, commitment, and constant evaluation. Space has been added in each section for funding agencies to add their own additional considerations. For more information and the most recent version of the SAGE toolkit, please visit bit.ly/ediSAGEtoolkit.

Advertising

	Consideration	Recommendation	Description	Action Taken
Strategy	**Where is the funding opportunity, or call for applications or proposals, advertised?**	Recruit widely. Advertise in various outlets and platforms to reach different organizations and people, like list-serves, professional societies, and university, Band and Treaty offices, Indigenous environmental organizations, and Lands Departments. Encourage sharing and relationship-building with underrepresented groups.	Attract a more diverse applicant pool[1,2]. Example outlets and platforms include the Canadian Society of Ecology & Evolution, WorkCabin.com, Wildlife Society and Ecological Society of America (chapters across Canada), minority serving institutions (msiexchange.nasa.gov) and social media accounts such as @blackmammalogists, @DiversifyEEB, @Diversifygrads.	*Yes / No* *Details: …*
	Is recruitment active, passive, or both? *	Employ active/targeted and passive recruitment strategies. Reach out to previously successful institutions and organizations to help advertise. Contact previous grant recipients to suggest potential new applicants. Provide recruiters with EDI training.	Passive recruitment requires fewer resources, but active recruitment can encourage deserving applicants[1] with strong applications who might not otherwise apply[3]. Avoid recruiting non-marginalized and already well-represented groups. The Canada Research Chairs Program has been working on training requirements for those involved in recruiting and nominating processes.	*Yes / No* *Details: …*
	When is the funding opportunity advertised?	Advertise the grant around the same time each year.	Applicants can anticipate opportunities. Predictability helps advertisements reach a wider audience over time.	*Yes / No* *Details: …*
	How much time is there between advertising and the application deadline?	Provide a clear and discrete deadline. Consider how much money is being distributed when setting a deadline. E.g., A funding opportunity for $50,000 should have more time between advertising and application deadline than for $5,000.	Time to prepare an application should take into account the quantity of materials and writing required, and be commensurate with the size of the award. However, applications for large (and multi-year) awards should still be feasible for less-well resourced individuals and organizations.	*Yes / No* *Details: …*
	Are URLs and hyperlinks up to date?	Ensure correct links current information. Indicate what information may change per funding cycle.	Potential applicants without access to mentorship rely heavily on information on websites[4]. Broken links and outdated information are a barrier to information.	*Yes / No* *Details: …*
	Additional considerations…	*Recommendations…*	*Description…*	*Yes / No* *Details: …*

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Considerations in bold indicate that they are especially important for EDI.

	Consideration	Recommendation	Description	Action Taken
Information Content	**What language is used in the advertisement?**	Provide information in at least both official languages (i.e., English and French). Use inclusive language, updating as appropriate terms evolve. Use consistent wording over time (i.e., across grant cycles). Minimize technical jargon.	Use inclusive language[1,5] in the advertisement, updating as appropriate terms evolve. e.g., FNMI (First Nations, Métis, Inuit), Indigenous, LGBTQIA2S+, racialized, BIPOC. Excessive Jargon can have a connotation of classism; also some applicants/researchers may use different terms[6,7].	*Yes / No* *Details: …*
	Does language convey a neutral tone?	Avoid describing applicants with superlatives: "Applicants must have a PhD and leadership experience" instead of "Successful applicants have exceptional leadership skills."	Saying ideal applicants are "exceptional", "thought leaders", "world class", etc., may discourage applicants who do not think of themselves as such[8].	*Yes / No* *Details: …*
	Is there information about eligibility requirements?	Communicate and justify requirements such as citizenship or career stage.	Potential applicants will not spend time on an application if they initially know they are ineligible.	*Yes / No* *Details: …*
	Does the ad include an EDI statement?	Include an EDI statement. Statements should be specific and detailed how the funder supports EDI. For example, include why diverse perspectives and experiences are valued, and non-monetary resources available to recipients.	EDI statements[9] suggest an earnest commitment. While applicants may not be deterred by a lack of one, robust and action-oriented EDI statements provide transparency a level of credibility for the funding agency. The degree to which the funder abides by their EDI statement can be judged by criteria in this toolkit.	*Yes / No* *Details: …*
	Does the ad describe how the review process will meet EDI goals?	Include a brief description of criteria and requirements of reviewers. How are they trained? How will people be selected, personal biases minimized, gaps in perspectives addressed?	Clear description of how the review process will strive to be equitable provides confidence in the integrity of the organization and the funding opportunity; especially can give assurance to applicants from BIPOC and historically marginalized backgrounds.	*Yes / No* *Details: …*
	Are required and preferred qualifications clearly differentiated?	Clearly distinguish between required vs. optional/preferred qualifications. State if applications are encouraged despite any unmet preferred, optional qualifications.	More applicants, who might not otherwise apply because they do not have the preferred qualifications, may apply if they know that they at least meet the minimum necessary requirements.	*Yes / No* *Details: …*
	Does the ad clearly state the award amount?	State the award amount and how it is determined.	Prospective applicants can determine if the size of the award is sufficient for their needs[10].	*Yes / No* *Details: …*
	Additional considerations…	*Recommendations…*	*Description…*	*Yes / No* *Details: …*

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Application

	Consideration	Recommendation	Description	Action Taken
Implementation	Is the application through a university or can it be direct to the funding agency?	Allow both. If applications are sent directly, consider providing the application materials in multiple formats (e.g., web portal, email, PDF, Word/Google doc) to increase accessibility. For web portals, ensure all questions/parts are posted somewhere, and allow navigation between pages and saving progress before submission. Flexibility increases accessibility.	Tri-Council (CIHR, NSERC, and SSHRC). Require allows both. Applicants not at or affiliated with an academic institution may be disadvantaged if university-submissions are required or prioritized. This can be difficult with high applicant volume. If institutions have their own review and selection processes, funding agencies should be clear about standardized expectations. Consider mandatory training for institution staff.	*Yes / No* *Details: …*
	Is the application submission process single or multi stage?	Structure the application to have multiple stages, wherein the first requires a short project summary or Letter of Intent. Compelling and/or promising proposals can be invited to submit a full application, possibly also given feedback to increase chances of success.	By progressing only competitive applications to the next stage, multi-stage submission processes can increase efficiency by reducing the workload of both applicants and reviewers. Project summaries or Letters of Intent invited to submit full applications are more likely to be successful.	*Yes / No* *Details: …*
	Additional considerations…	*Recommendations…*	*Description…*	*Yes / No* *Details: …*

	Consideration	Recommendation	Description	Action Taken
Requirements	**How flexible are eligibility requirements?**	Assess the relevance of eligibility requirements and consider other ways to demonstrate qualifications, such as years since terminal degree or intent to remain in Canada/ relationship to Canadian residency. For example, Liber Ero does not require applicants to be Canadian, but that research should be primarily in Canada. Provide brief justifications: e.g., "The funder requires successful applicants to be Canadian citizens because...", "Applicants whose residency status is not yet secured will be considered..."	Eligibility requirements may make assumptions about applicants. For example, requiring citizenship or residency-status may prevent newly-arrived, BIPOC, historically marginalized, early-career applicants. Related to “Are required and preferred qualifications clearly differentiated?” in Advertising.	*Yes / No* *Details: …*

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	Consideration	Recommendation	Description	Action Taken
Requirements *cont.*	Are official or unofficial transcripts required?	Consider what information transcripts add to the application. If required, consider initially allowing unofficial transcripts and only requiring official transcripts to verify if the applicant makes it to the final round.	Official transcripts usually cost money. Also, they can take weeks to receive, especially in the fall term when applications from several awards from multiple disciplines are due.	*Yes / No* *Details: …*
	Are letters from references required or just their contact details? How many?	Consider only requiring names and contact details. The number should be commensurate with the award amount and the expected amount of experience. Graduate students likely can only, and thus should be required, to provide fewer references/letters compared to postdocs. Provide deadlines and ample time to secure letters.	Multiple letters or references can be a barrier for applicants with less experience (or those with extenuating circumstances that may have affected their ability to have multiple references). A clear deadline allows applicants to gauge whether their references are able to adhere to application deadlines.	*Yes / No* *Details: …*
	Are there specific formatting requirements for preparing applications?	Avoid strict rules or placing weight on formatting, such as font size or margins, etc. Clearly communicate word counts or page limits in the application instructions. Ensure word limits correspond to weighting of different sections.	Clear guidelines help prevent applicants from spending excessive amounts of time cutting responses to meet limits.	*Yes / No* *Details: …*
	Additional considerations…	*Recommendations…*	*Description…*	*Yes / No* *Details: …*
Content	**Is the applicant required to say how they have contributed to EDI efforts?**	Instead of requiring descriptions of EDI contributions, allow applicants to describe how EDI is relevant to them in a position statement. Open-ended prompts provide room for interpretation, e.g., "What does EDI mean to you?"	The work of addressing EDI issues should not lie only with communities that are already burdened with being marginalized, and whose members may not have the opportunities or ability to participate in EDI activities.	*Yes / No* *Details: …*
	Does the application ask for EDI/demographic information about the applicant?	This should be included but optional. Offer a write-in option. Explain the relevance of EDI-related questions, such as the reason for asking, how it will be used, and pertinence to the review process. Consider multiple axes of identity, inclusiveness of the format, why it is relevant to ask[11]. Examples can be found here[12].	Such data can help develop metrics to track EDI efforts and their effectiveness over time. Write-in options increase visibility for under-represented groups and help avoid identity erasure. Data must be collected for a clear purpose but not be the sole statistic by which to measure EDI progress. Consider the Canada Institutes of Health Research FAQs about self-identifying[13].	*Yes / No* *Details: …*

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	Consideration	Recommendation	Description	Action Taken
Content *cont.*				
	Does the application ask about non-academic experiences?	Allow applicants to describe relevant details about barriers or delays during their careers, and skills/instances of leadership/initiative relevant to proposed research. Explicitly state reasons for asking and how this will be considered in the review process. If the review is point-based, consider limiting the maximum number of points that can be deducted as a result of non-academic needs or barriers that may have affected progress.	Relevant experience is not accessible to all[14]. Applicants may be disadvantaged if they needed to devote time to non-academic needs (work, family, etc.) or had barriers to accessing resources. Diverse ways of showing excellence and leadership go beyond traditional measures such as number of publications or institutional awards. Funders must have a clear plan for how to evaluate this section.	*Yes / No* *Details: …*
	Additional considerations…	*Recommendations…*	*Description…*	*Yes / No* *Details: …*
	Consideration	**Recommendation**	**Description**	**Action Taken**
Support	Is there an estimate of how long the application will take to complete?	Included an estimated completion time, which should be commensurate with award size. At minimum, include descriptions of the number of questions and their format. For example, "All sections have 500 word limits and are weighed equally".	Estimated completion times help applicants anticipate the time needed to prepare documents and write cover letters, essays, etc[15, 16]. Resource-limited applicants can develop a strategy to submit. Such information can be collected from previous applicants and even queried in the application.	*Yes / No* *Details: …*
	Is an email available for applicants to contact?	Provide the email address of a specific person, position, or office at the funding organization. Make efforts to respond to queries in a timely manner.	Funding opportunities can reduce barriers to application by providing email responses to questions about the application or unexpected circumstances. Questions may arise about process, requirements, or discrepancies between different sources. Timely responses can increase the number of applications and reduce anxiety about whether questions have been received[17].	*Yes / No* *Details: …*
	Are additional resources available to applicants?	Provide a FAQ for generic queries about details of the application process. Ideally develop webinars about the process with tips for crafting successful applications.	Guidance about application details or specifics can be helpful, especially for competitive funds, lengthy applications, or when external resources/support are limited.	*Yes / No* *Details: …*
	Additional considerations…	*Recommendations…*	*Description…*	*Yes / No* *Details: …*

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Review

	Consideration	Recommendation	Description	Action Taken
Communication	Are expected timelines and decision dates clearly stated?	Provide dates by which *all applicants* should receive a decision. Communicate how long the review process will take, e.g., "applicants will receive a decision by March 1."	An explicit timeline helps applicants plan. This increases transparency, helping applicants plan as well as for reviewers who serve on panels for multiple grant cycles.	*Yes / No* *Details: …*
	Are updates about the review process provided to applicants?	Provide updates, especially regarding delays in the review process. Confirm with applicants when submissions have been received and as soon as decisions are made.	Confirmations provide applicants with a sense of closure at each stage of the process, reduce the number of inquiries, and offer a realistic sense of when they will receive a decision. Updates help applicants plan.	*Yes / No* *Details: …*
	Is there public information about the weighting and evaluation of application sections?	Be as specific as possible about how different aspects of the application are weighted, e.g., 30% to proposal, 15% to EDI, etc. These metrics should be public.	Provides applicants with a guide with respect to how much time should be spent on different sections. Public information increases EDI accountability.	*Yes / No* *Details: …*
	Additional considerations…	*Recommendations…*	*Description…*	*Yes / No* *Details: …*
Review Panel	**What requirements of reviewers are considered when assembling reviewers?**	Recruit reviewers from diverse backgrounds, considering for example: geography, language, institution affiliation, gender, career stage, age, accessibility, and ability.	This ensures that multiple perspectives are present, and also helps minimize personal biases, especially those that would otherwise be held by the majority[18, 19]. For the Banting fellowship, requirements include academic and research excellence and representation from a range of institutions, expertise, region, language, and gender[20].	*Yes / No* *Details: …*
	What trainings do reviewers receive before the review process?	Provide EDI resources and require reviewers to receive EDI training, such as those required by the Canadian Tri-Council (CIHR, NSERC, and SSHRC). Require evidence of training. Activities such as mock reviews can also familiarize reviewers with the process and help clarify procedures.	Training helps reduce bias and unprofessionalism[21] during the review process and increases knowledge about the EDI and its importance when reviewing applications[22, 23].	*Yes / No* *Details: …*

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Review Panel *cont.*

Consideration	Recommendation	Description	Action Taken
Are reviewers' names public?	Names should be publicized (e.g., posted on website) during or after the review process, and updated per funding cycle or when reviewers change.	Publicizing reviewers' names contributes to a transparent review process. However, reviewer anonymity during the review process may be important for safety and unbiased reviews.	*Yes / No* *Details: …*
Are reviewers recognized or compensated for their contributions? *	When possible, compensate reviewers for their time and expertise. Consider meaningful acknowledgement of reviewers' contributions (e.g., financial compensation or some mechanism with employer or institution).	Undue burdens and workloads should not be put on reviewers, especially those from under-represented groups.	*Yes / No* *Details: …*
Are previously successful applicants invited to act as reviewers for future funding cycles?	Consider asking previous successful applicants to either serve as reviewers, or at least request optional and anonymous feedback from them about the application process.	Previous recipients have experienced the review process. Accessing their perspectives increases EDI in the review process and helps application components achieve the desired elicitation from applicants, resulting in greater EDI in applicants and recipients.	*Yes / No* *Details: …*
Does an EDI advocate sit on the review panel?	Consider placing an EDI advocate, officer, or "champion" on the review panel to participate in meetings and discussions, even if they do not contribute to application reviews.	A person trained in EDI, bias reduction, and facilitation can help maintain EDI standards and expectations of reviewer conduct, with merely their presence and/or by asking mindful questions about the motivations behind scores and decisions,	*Yes / No* *Details: …*
Is there a code of conduct for reviewers?	Before beginning their duties, require reviewers to agree to a code of conduct that describes expectations, how issues may be resolved, and consequences for failure to adhere.	A code of conduct for reviewers increases awareness, provides a guide, and creates accountability.	*Yes / No* *Details: …*
How long do reviewers serve? *	Designate a maximum number of review cycles (e.g., 3-4 years) for which someone can serve as a reviewer.	Having a maximum reduces the burden on reviewers and encourages diversity in the review panel. Reviewers for the Banting Fellowship serve a maximum of 3 consecutive years[24].	*Yes / No* *Details: …*
Additional considerations…	*Recommendations…*	*Description…*	*Yes / No* *Details: …*

| Consideration | Recommendation | Description | Action Taken |

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Review Process	**Is the review process blind? ***	A double-blind process is a good approach to address some biases, but it can also mask other, implicit, personal biases. Alternatively (or additionally), have a diverse review panel with multiple reviewers for each application.	A carefully developed review structure contributes to a transparent process. No approach is likely to be perfect, and limitations and weaknesses should be acknowledged[25].	*Yes / No* *Details: …*
	Do all applications begin with the same score or standing? *	State in the advertisement and application that applications from marginalized, underrepresented, and BIPOC groups will receive special/additional consideration (not just that they are encouraged). Consider pre-scoring or preliminary rankings to help applications that self-identity as from under-represented groups and elevate them to the forefront of discussion or review, although this may leave some out if self identifying is optional.	Research has shown that narrow definitions of appropriate, rigorous science, or accepted paradigms can limit and systematically underfunded demographics (e.g., black)[26]. This approach will also help redress the history of marginalization and intersectionality. For example, Vanier and Banting fellowships have a *form* of this through their selection criteria and procedures, although it does not seem to specifically target EDI objectives[27].	*Yes / No* *Details: …*
	Do reviewers discuss rubric scoring?	After scoring but before final decisions, reviewers should meet to review applicants' evaluations and scores. Use scores as a tool for discussion rather than as a decision-maker.	Over-reliance on quantitative scores reduces nuance in evaluations. Roundtable meetings create consensus and transparency, and reduce personal biases that may have influenced results.	*Yes / No* *Details: …*
	How are non-academic parts of the application weighted/considered?	Non-academic, non-traditional but nevertheless relevant experience and achievements such as leadership should be considered indicators of excellence and potential success[28, 30].	Extenuating circumstances (e.g., family responsibilities, leave) can affect traditional "success" metrics such as grades, work experience, publications.	*Yes / No* *Details: …*
	Do reviewers debrief after the review process?	At the end of each funding cycle, provide reviewers with the opportunity to offer feedback on the review process.	Reviewers may have insights that can increase transparency and accountability in future grant cycles.	*Yes / No* *Details: …*
	Additional considerations…	*Recommendations…*	*Description…*	*Yes / No* *Details: …*

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Awarding

	Consideration	Recommendation	Description	Action Taken
Communication	**Are non-monetary resources awarded?**	Explicitly state in the application process if the award includes other benefits or resources, such as training, travel, mentorship, and how long those resources are available.	Non-monetary support could be an incentive for potential applicants, and could provide valuable training, mentoring, and networking.	*Yes / No* *Details: …*
	Is there indication about how competitive the opportunity is?	Explicitly state in the advertisement and or application the number of applicants and awards given in previous funding cycles.	While this may vary among years, providing statistics for previous years provides applicants with an idea about chances of success.	*Yes / No* *Details: …*
	In how many stages/portions is the money awarded? *	Explicitly state in the application how funds will be awarded. Reduce the number of payments, ideally awarding funds up-front rather than as reimbursements. Explicitly state if payment is through another institution e.g., university, and tax implications.	Applicants may not have personal funds to front costs for subsequent reimbursement. Limited access to funds could be a significant barrier. Lump sum payments at the start could ease many access problems, develop trust, and increase applicant's chances of success.	*Yes / No* *Details: …*
	Is feedback given to successful or unsuccessful applicants?	Feedback to all applicants increases their future chances of success, either with the same or different funding opportunities. If this is an option, then also communicate when applicants should expect to be notified.	Minimize additional work for the review panel by using feedback from official notes from the review process or completed rubric forms with short answer components for reviewers to elaborate on any strengths and/or weaknesses. The Canadian Research Chair Program asks reviewers to provide feedback to assist unsuccessful applicants in future advancement[29]. Train reviewers to ensure constructive and useful feedback[30].	*Yes / No* *Details: …*
	Are applicants given the opportunity to provide feedback?	Ask applicants for feedback about the application process, as well as their experience holding the award (e.g., exit interview or survey). Target questions to identify strengths and areas for future improvement.	Applicants may provide valuable feedback to funders that can make the application, review process, and award tenure easier to navigate and inclusive.	*Yes / No* *Details: …*

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Section	Consideration	Recommendation	Description	Action Taken
Communication *contd.*	Are there reporting requirements for successful applicants?	Avoid unnecessary reporting that burdens recipients with no benefit. If specific reporting requirements exist, be explicit about expected deadlines and reporting documents (e.g., interim, annual, final reports, etc.). Report templates are helpful and should be provided upon award acceptance. Recipient-specific discussions about realistic report deadlines are encouraged.	It is important for successful applicants to know what kind of work is required for reports throughout the award life cycle. This is especially important if delivery of funds is dependent on report submissions.	*Yes / No* *Details: …*
	Additional considerations…	*Recommendations…*	*Description…*	*Yes / No* *Details: …*

	Consideration	Recommendation	Description	Action Taken
Award Limitations	Are recipients allowed to/prohibited from accessing other resources?	Explicitly state in the advertisement and application materials if recipients are prohibited from holding multiple concurrent (financial) awards or employments. Consider allowing applicants to hold simultaneous awards, especially if awarded by different funding agencies.	It is limiting to applicants if their prestigious award only partially covers expenses and are prohibited from seeking additional funding to cover costs. Not allowing for multiple sources of income can disadvantage applicants with less socio-economic power. This information allows applicants to determine whether they can or should apply for the award at the outset.	*Yes / No* *Details: …*
	Are funds limited to certain expenses?	Explicitly state in the advertisement and application materials if there are any restrictions to how the funds can be used, such as publication costs or salary/stipends. Allow applicants to list in the application any potential costs which may not already be specifically mentioned under the award. Generally, avoid stipulations.	Knowledge about financial limitations allows applicants to plan ahead, and encourages transparency. This may be especially important for students, whose expenses can include tuition, books, materials, and living costs. All are important to the success of the student, and should be considered eligible expenses.	*Yes / No* *Details: …*
	Is multi-year or continued/renewed funding possible?	Specifically state whether the grant is renewable or not. The possibility of renewed funding offers ECRs financial security when trying to establish a foothold in their field.	Information about repeat funding helps applicants strategize when in their careers to apply for funding opportunities.	*Yes / No* *Details: …*
	Are paid leaves or breaks allowed?	Allow for leaves and breaks to account for unexpected circumstances that may affect the ability of recipients to make progress. Ideally, leaves and breaks should be paid. At minimum, state in the application if leaves are allowed.	Leaves and breaks, especially paid, allow for unexpected life circumstances. Funding flexibility is important for promoting EDI[15].	*Yes / No* *Details: …*

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	Consideration	Recommendation	Description	Action Taken
Award Limitations *contd.*	Are no-cost extensions of funds possible?	Offer conditions for no-cost extensions to funds if the proposed deliverables/project end up being delayed.	Flexibility reduces stress and avoidable burdens on the recipients' livelihood and work. Clearly communication increases the chances that people without such prior experience or knowledge of such possibilities can still take advantage of such options and funding opportunities.	*Yes / No* *Details: …*
	Additional considerations…	*Recommendations…*	*Description…*	*Yes / No* *Details: …*
Reporting	**Is information about recipients' diversity collected, analysed, and reported? ***	Aggregated patterns about recipients may be tracked and reported to improve future funding cycles. This requires optional questions in the application to declare ethnicity, racial background, and other axes of identity and underrepresentation.	Information about recipients (and applicants) allows funders to track diversity trends over time and make changes to encourage diversity among applicants[31]. Funders should be very clear about what they are collecting this information for[12]. Metrics should not be the sole measure of EDI progress.	*Yes / No* *Details: …*
	Are successful applications published?	With consent from applicants, successful applications may be published and made publicly available	Successful applications can help future applicants, such as those from smaller institutions or who may have less guidance and support, to craft better applications.	*Yes / No* *Details: …*
	Additional considerations…	*Recommendations…*	*Description…*	*Yes / No* *Details: …*

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Citations

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