

An Economist’s Informal Guide to Writing an EDI Statement*

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1 Commitment to Equity, Diversity, and Inclusion

Grant applications increasingly require applicants to build Equity, Diversity, and Inclusion (EDI) into their proposals.¹ This requirement is partly symbolic, representing a societal culture change. But many organizations also view the EDI statement as a tool that can be used to bring about culture change. EDI statements may promote EDI in the “academic research ecosystem”, both by recognizing the efforts of scholars who already practice EDI and by requiring others to consider how they would do so. This guide combines some of the latest advice on how to incorporate EDI into our professional practices with application to the economics profession. Although the guide is long, it is not comprehensive.

Equity, diversity, and inclusion are broad and multifaceted terms. The Government of Canada defines EDI in the following way ([verbatim from the SSHRC funding guidelines](#)):

- *Equity is defined as the removal of systemic barriers and biases enabling all individuals to have equal opportunity to access and benefit from the program.*
 - *To achieve this, all individuals who participate in the research ecosystem must develop a strong understanding of the systemic barriers faced by individuals from underrepresented groups (e.g., women, persons with disabilities, Indigenous Peoples, racialized minorities, individuals from the LGBTQ2+ community) and put in place impactful measures to address these barriers.*

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¹You may also see EDI in conjunction with “decolonization”, making the acronym EDID. For simplicity, this guide focuses on EDI principles, but if your teaching practices or research methodologies draw on strategies for decolonization, you should include this information in your application. Broadly, decolonization is about deconstructing colonial ideas of superiority and privilege of Western thought and approaches. It involves dismantling unbalanced power dynamics and revitalizing Indigenous Knowledge and approaches.

- *Diversity is defined as differences in race, colour, place of origin, religion, immigrant and newcomer status, ethnic origin, ability, sex, sexual orientation, gender identity, gender expression and age.*
 - *A diversity of perspectives and lived experiences is fundamental to achieving research and training excellence.*
- *Inclusion is defined as the practice of ensuring that all individuals are valued and respected for their contributions and are equally supported.*
 - *Ensuring that all team members are integrated and supported is fundamental to achieving research and training excellence.*

Practices that advance equity, diversity, and inclusion are highly valued by funding organizations as well as the economics profession more broadly. The Tri-Agency members have integrated EDI into their excellence indicators and evaluation criteria.² Since its inception in 2018, the New Frontiers in Research Fund (NFRF), which is managed by the Tri-Agencies Secretariat, has embedded EDI requirements into its program design.³ The American Economic Association (AEA) now has [an entire website](#) dedicated to providing research-based best practices for economists to build a more diverse, inclusive, and productive profession. Clearly, it is becoming increasingly important to your professional success that you understand how your practices either consciously or subconsciously relate to EDI.

Importantly, the most effective EDI statements will go beyond the symbolic, demonstrating a real commitment to principles of equity, diversity, and inclusion. Ashcraft and Allen (2020) provide some suggestions for how to avoid virtue-signaling and performative practices:

- Explicitly acknowledge systemic racism. Don't simply include vague generalities about the importance of diversity and equity.
- Acknowledge that even your own institution is racist.
- Point out that systemic racism harms everyone, even though the burden disproportionately falls on faculty and students of color.
- Describe how you are increasing your knowledge and applying the lessons you learn.

²The Tri-Agencies include the Canadian Institutes of Health Research (CIHR), Natural Sciences and Engineering Research Council (NSERC), and Social Sciences and Humanities Research Council (SSHRC).

³You can read more about those best practices here: <https://www.sshrc-crsh.gc.ca/funding-financement/nfrf-fnfr/edi-eng.aspx>

- Indicate your ongoing commitment to anti-racism, including milestones and deadlines. If you are involved in anti-racist efforts at your institution, directly link to those efforts.

Generally speaking, EDI statements should be no more than two, single-spaced pages in length. Although the format will vary, EDI statements tend to include an introductory paragraph, sections that separate research practice from research design, and a conclusion. Avoid using jargon, buzzwords, or vague statements. Instead, include specific details and concrete examples whenever possible.

2 Sections of the EDI Statement

Some applications are evaluated on the basis of how well EDI principles are integrated throughout the research proposal. Some applications are evaluated based on the quality of a standalone EDI statement. If you are asked to produce the latter, I recommend covering the following three sections in your EDI statement: (1) Research Team and Research Environment; (2) Teaching, Mentorship, and Professional Service; and (3) Research Design. In their evaluation of proposals, the Tri-Agency members (including SSHRC) draw a distinction between “research practice” (Sections 2.1 and 2.2) and “research design” (Section 2.3), so you may alternatively wish to structure your EDI statement along those lines.

2.1 Research Team and Research Environment

As the principal investigator (PI) on the grant, the funder assumes that your responsibilities include recruiting, training, and mentoring.⁴ Through your approach to these activities, you are fostering a specific research environment. In this section, your goal is to explain to the funder the concrete EDI-related practices that you will adopt as you compose your research team – which could include co-PIs, student research assistants (RAs), postgraduate researchers, and other collaborators – and how you otherwise plan to develop an inclusive research environment. This section should be written with the understanding that structural barriers exist within academia, and that these barriers disproportionately affect scholars belonging to certain disadvantaged groups. We should also acknowledge that barriers exist at all levels, from undergraduate students to faculty members. Before writing this section, it might be helpful to read and learn more about the structural barriers in academia and the consequences of these barriers. You can find an overview of selected research in Appendix A.

⁴The advice in Section 2.1 largely draws on guidance from the [Government of Canada’s SSHRC funding guidelines](#)

2.1.1 Recruitment and Hiring

In this part of the section, you most likely will include a statement about how structural barriers operate at the margins of recruitment and hiring. If we allow these barriers to remain unmitigated, we may be depriving our research team of valuable diversity of thought, perspectives, and experiences. Your job is to explain how your recruitment and hiring practices intentionally draw on EDI principles. A strong explanation will include a description of the *practices* you plan to adopt. What does this look like? Here are some examples:

- Advertise openings in a way that is accessible to everyone. Circulate job openings widely in an effort to reach everyone, or target student groups representing racially marginalized students.
- If you are interviewing for an opening, attend implicit bias workshop and implement the tools learned.
- Design your interview questions/assessment criteria with an appreciation for diverse viewpoints and experiences.
- Evaluate candidates based on their own commitment to EDI.

Many of those examples are most applicable to large lab-based research groups, or research projects that involve research assistants or postdoctoral researchers. What if you are working independently or in collaboration with a small number of co-PIs? In this case, you may wish to describe the practices you would implement if your project were to require student assistance in the future. For example, would there ever be an opportunity to hire a student to provide copy editing services? If so, you could describe the hypothetical practices you would implement if you were in this position. Or, you could describe the practices you adopt to ensure that the diverse perspectives of all co-PIs are valued and respected. You can also explain how, at the institutional level, the University of Alberta is committed to meeting the requirements of the Canada Research Chair Program's Equity Diversity and Inclusion Action Plan and increasing awareness and understanding about the benefits of EDI with students, faculty, and staff.

As a note of caution, it is important to avoid tokenism, which would be recruiting and hiring a person belonging to an underrepresented group simply to fulfill a diversity quota. With this in mind, you should avoid listing the characteristics of your research team as a sort of diversity checklist. Instead, you should describe how you have taken, or plan to take, meaningful action in recruitment and hiring, motivated by a real desire to remove structural barriers.

2.1.2 Training and Development Opportunities

In this part of the section, you most likely will include a statement about how structural barriers impact researchers' ability to access important career development opportunities. How will you ensure that everyone on your research team has equal access to opportunities? Again, you should describe the concrete practices that you plan to adopt. What types of practices would be relevant here? Some examples include:

- Provide clear communication of opportunities to all members of the research team.
- Distribute development opportunities evenly across team members. For example, you may have a policy whereby conference attendance will be funded for all team members on a rotating basis.
- Ensure that graduate students, postdoctoral researchers, and junior faculty have opportunities to expand their networks and promote their own research.
- Identify yourself, or your co-PI, as the team member with accountability for ensuring adherence to EDI in training and development.
- Make a plan to provide EDI training for the entire research team.

Again, many of these practices are most relevant for large projects involving many collaborators. What if you are working independently? In this case, you could make a commitment to obtain EDI training for yourself. What if you are working in collaboration with a small number of co-PIs? You could explain how you and your co-PIs plan to consider EDI principles in your approach to decisions that may have career implications (e.g., authorship order).

2.1.3 Inclusion

Building an inclusive research environment means supporting all members of the research team. In an inclusive research environment, every member of the research team is recognized for their unique contributions, which draw on the diversity of their lived experiences. You may wish to start this section with a statement about how inclusion is necessary for a researcher to reach their full potential and an acknowledgement that inclusion requires conscious effort. You should also describe your concrete plan to integrate all members of the research team into the research environment. Some examples include:

- Commit to fostering a culture that is safe and respectful for everyone.

- Develop a process for swift, fair, and confidential complaint management. You may also wish to acknowledge the importance of taking complaints seriously.
- Have a mechanism for members of your research team to raise concerns about the research environment, and have a process for addressing concerns.
- Make a plan to educate yourself about the structural issues impacting your research team, such as the legacy of colonialism or anti-Black racism, for example.
- Provide accommodations for your team members, for example flexibility in hours for family or religious obligations, support services for international members of the team, etc.

If you do not have a research team, you may wish to cite the institutional plan for promoting an inclusive research environment. Or, where applicable, you could discuss the transparent nature of your research. Have you published a data replication package, or do you have your code posted on your website? If so, you could explain how it is an act of inclusion to provide open access to your research materials.

2.2 Teaching, Mentorship, and Professional Service

Sometimes you will be instructed to explain how you incorporate EDI into your teaching, mentoring, and service activities. Before writing this section, take some time to reflect on the ways in which you engage with your students, your colleagues, and the academic research community more generally. How do your actions advance EDI objectives?

2.2.1 Teaching

Our teaching may relate to EDI in many different ways, ranging from our pedagogical approach to the topics we cover. If you teach about diversity topics, you can mention that here, and describe what you hope to achieve with these lessons. If you are among the many economists whose courses do not explicitly address diversity topics, you should instead focus on how you foster an inclusive and equitable learning environment. As instructors, we serve a student body that is diverse in terms of race, ethnicity, gender expression, ideology, and lived experiences. In this part of the section, you have the opportunity to share information about how your teaching practices accommodate diverse learning needs. You may wish to include some of the following information:

- How you have designed your instructional materials to accommodate diverse learners. For example, you may rely on a range of evaluative materials, you may have a strategy for reducing bias in grading, you may incorporate a range of instructional materials drawing on scholars with different perspectives and backgrounds, etc.
- Your use of inclusive language in your syllabus, perhaps including a course EDI statement. [Brown University](#), for example, has recommendations for including a diversity statement on course syllabi.
- The steps you have taken to decolonize your pedagogy and their impact on student learning.⁵
- The teaching strategies you employ to promote respectful conversation and engagement with controversial or divisive topics.
- How you foster a culture of inclusivity and belonging in your classroom.
- Your commitment to collecting student feedback and reflecting on the effectiveness of your own teaching practices.

2.2.2 Mentorship

In this part of the section, you will discuss your professional mentoring roles, either formal or informal, and your approach to mentorship. Your role as a mentor can be broadly defined. Do you advise any graduate students? Have you provided advice to undergraduate students about their career choices? Do you regularly provide guidance to junior faculty? All of these activities could be considered mentorship.

The funder typically will be interested to know how your approach to mentoring aligns with EDI principles. If you engage in activities to support and promote students and junior colleagues, you are most likely practicing EDI-related mentorship. A convincing statement about mentorship will acknowledge the importance of mentorship, particularly for scholars who face structural barriers (Reddick and Young, 2012; Stamm and Buddeberg-Fischer, 2011). It will also provide specific examples of concrete practices that you have adopted as a mentor. For example, let's say you have worked with students who belong to groups that are underrepresented in economics. How did you identify structural barriers facing these students and help

⁵If you'd like to learn more about decolonizing your pedagogy, I would recommend reading Tanaka et al. (2007). Strategies for decolonizing your pedagogy may include: bringing Indigenous voices forward by, for example, assigning readings by Indigenous scholars or inviting Indigenous guest speakers; emphasizing experiential learning opportunities; avoiding Western notions of competitiveness in the classroom by removing grading curves; minimizing the role of lecturing in the classroom; relying on assessments that are designed around the concept of relationality – for example, avoiding multiple choice question exams. If you have questions about how to decolonize your courses, I'm happy to share additional tips and resources.

them overcome those barriers? Perhaps you regularly share extracurricular opportunities targeted at women or racialized minority students. Or maybe you make the effort to help students or junior colleagues establish network connections. If so, provide details of these specific examples. You may also decide to take advantage of some of the mentorship development tools offered by your institution, such as unconscious bias or antiracism training. Finally, have your personal experiences overcoming structural obstacles shaped your approach to mentoring? If so, this information can be quite impactful if you feel comfortable sharing it.

If you are the PI on a large research project, you may also wish to discuss how mentoring is practiced within the team environment. You could include some of the following examples, where relevant:

- Your plan to ensure that all members of the team have equal access to mentoring.
- Relatedly, your plan to ensure that all members of the team have an equal mentoring burden. (We know that members of underrepresented groups tend to invest more time in mentorship activities.) If the burden is unequally distributed, explain how you reward team members for their efforts.
- If your team composition lends itself to mentorship among team members (for e.g., postdoctoral scholars mentoring PhD candidates or PhD candidates mentoring undergraduate students), you may require your team members to undergo EDI training.
- Your approach to fostering effective mentor-mentee relationships within the team.
- The steps you have taken to establish mentor-mentee boundaries within your team and between yourself and your mentees. How frequently do you meet? What is the nature of these meetings? What is your feedback mechanism? Etc.

2.2.3 Service Activities

Do you participate in any service activities geared toward the promotion of EDI? These activities could take the form of serving on committees, participating in community outreach, or even engaging in volunteer work. This is your opportunity to discuss those activities. Rather than simply listing the activities, describe your involvement. Explain what you have learned through your involvement and how you will incorporate these lessons into your research practice or research design going forward. Be careful not to generalize too broadly. Instead, be specific and clear about what you have taken away from these experiences.

2.3 Research Design

Funders may ask us to explain how our research design draws on EDI principles. You can respond to this request by discussing the focus of your research, the groups served by your research, and/or the research methodologies you employ. If your research focuses on social or economic inequality (see the below section on Diversity Research), use this section to explain how your scholarship enhances our understanding of the complexities of the lived experiences of diverse groups of people. If your approach to research takes into account diversity or identity factors (see the below section on Research Methodologies), use this section to describe how you apply EDI approaches to your research design. Depending on the nature of your research, this section may or may not be straightforward to write.

Arguably, all fields in our discipline relate to EDI in some way. Economics is about people and the constraints, the endowments, and the decisions that people make. As we maintain our scientific approach to studying social issues, we should acknowledge that the behavior of people is inherently “messy” (OIGI, 2021). Some scholars argue that the assumptions we make to simplify human behavior may reinforce inequities. I recommend reading articles such as Komlos (2021) to help you think more critically about how your research relates to the economic system that disadvantages some groups of people. Economics research is shaped by the environment around us and also shapes that environment. In this section, your job is to articulate this in the context of your research.

2.3.1 Diversity Research

Do you do “diversity research”? The answer is yes if any of your research touches on themes of social or economic inequality, power imbalances, oppression, representation, or identity. And in that case, you should describe how your scholarship contributes to social change. Borrowing verbatim from the [University of Michigan’s National Center for Institutional Diversity](#), explain how your research seeks to:

- *inform understanding of historical and contemporary issues of social inequality across societal contexts and life domains (e.g., in education, arts and culture, health and mental health, economic and occupational attainment and mobility, infrastructure and community development)*
- *illuminate the challenges and opportunities that arise when individuals from different backgrounds and frames of reference come together in significant societal contexts, such as schools and colleges, neighborhoods and communities, work teams in organizations*

- *inform our understanding of systems of power and privilege and their interactions with groups historically underrepresented and marginalized based on identities including but not limited to race, ethnicity, gender, social/economic class, culture, sexual identity, ability status, and religion*
- *highlight the experiences of disenfranchised populations, whose narratives have traditionally been relegated to the outer periphery of intellectual inquiry and academic scholarship, made invisible through epistemologies and research methods that privilege dominant social groups*
- *foreground the knowledge systems, assets and resources, and cultural strengths of members of historically marginalized communities in order to promote empowerment of individuals and groups from these communities*

2.3.2 Research Methodologies

Diversity scholarship need not only be defined by the focus of our research topics or the groups served by our research outputs. Diversity scholarship may be defined by its inclusive and non-traditional methodological approaches. Non-traditional approaches may include intersectionality, gender-based analysis, Indigenous research methodologies, and anti-racist approaches.⁶ In this part of the section, you can describe how EDI factors shape your research questions, theoretical frameworks, literature reviews, analyses and interpretations, and knowledge mobilization activities.

Examples of some practices you may adopt:

- Consider whether it is appropriate to include race or ethnicity as a control variable in your statistical models. William Spriggs encourages us to be “thoughtful about how [we] treat race and ethnicity in [our] research” (OIGI, 2021).
- Many of us invest substantial time learning the relevant history or institutional background related to our topics. During this process, make a conscious effort to identify the ways that laws and institutions differentially impact(ed) groups of people and how that may affect outcomes today.
- If you are doing any primary data collection, you may wish to oversample underrepresented groups. Randy Akee notes that the limitations of existing data sets preclude comprehensive analysis of outcomes related to racism and lack of inclusion (OIGI, 2021).

⁶Brief definitions of these approaches are provided in SSHRC Guide to Addressing Equity, Diversity and Inclusion Considerations in Partnership Grant Applications: https://www.sshrc-crsh.gc.ca/funding-financement/apply-demande/guides/partnership_edi_guide-partenariats_guide_edi-eng.aspx.

- Make a plan to present your research outside of economics and incorporate ideas and methods from other academic disciplines, where appropriate. Putting your research in the “marketplace of ideas” can enrich your analysis (Mullainathan, OIGI, 2021).
- Make a commitment to read relevant papers written by scholars who belong to identity groups that are underrepresented in your field.
- If you are conducting Indigenous research, outline how you intend to adhere to the mutual benefits and respectful relationships principles of the [Tri-Council Policy Statement](#).

3 Supporting Information

In addition to the three main sections of the EDI statement, you may wish to include additional supporting information, where relevant. Depending on how much content you would like to add, you may choose to embed this information within each of the three main sections, or you may wish to create a separate section. Supporting information may include:

- **A Statement of Values** as related to your commitment to EDI. What are your values regarding equity, diversity, and inclusion in your academic life? Why do you think diversity is important in academia? Why are these issues particularly important in the economics discipline?
- **Examples of Experiences** that demonstrate your commitment to EDI. What have you done to promote EDI in the classroom or in your one-on-one interactions with students, faculty, or staff? What were the outcomes? How successful were these experiences?
- **Future Plans** for promoting EDI in teaching/mentoring, service, and research. How will you continue your EDI work in the future? Are there future trainings, workshops, or professional development opportunities that you plan to take advantage of? If so, what are they and when will you pursue these opportunities? You may wish to mention that EDI efforts are long-term and iterative. Our future efforts will be informed by our learnings.
- **Self-Disclosure** of elements of your own identity. It is your choice whether to include personal information in your EDI statement. If you belong to an identity group that has been historically marginalized, you do not necessarily need to disclose that information. Many people choose to withhold the

information to mitigate the risk of bias in the evaluation of their application. If you do wish to disclose, consider sharing about how your identity has impacted your approach to teaching, research, or scholarship. Consider this your opportunity to contextualize the approaches you have described in your statement. For example, has your experience belonging to an underrepresented group shaped the way you mentor students who face similar obstacles? Whether or not you choose to disclose personal information, it may be helpful to reflect on the ways in which your experiences have formed your frame of reference.

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5 Appendix A: Structural Barriers in Academia

From the Government of Canada's [SSHRC funding guidelines](#):

- *The 2018 report published by the Canadian Association of University Teachers, [Underrepresented and Underpaid: Diversity Equity Among Canada's Postsecondary Education Teachers](#), highlights the persistent lack of diversity in the academic workforce, and wage gaps between men and women, and between white and Indigenous and racialized staff.*
- *[The Equity Myth: Racialization and Indigeneity at Canadian Universities](#), (2017) by Frances Henry, Enakshi Dua, Carl E. James, Audrey Kobayashi, Peter Li, Howard Ramos and Malinda S. Smith, discusses the barriers in academia faced by racialized and Indigenous faculty, including racism, unconscious or implicit biases such as curriculum vitae (CV) and accent bias, bias in letters of reference, citation and self-promotion, affinity bias and precarious work, white normativity, tokenism, ineffective equity policies, wage gaps and increased workloads (e.g., "the equity tax").*
- *The 2012 Council of Canadian Academies report, [Strengthening Canada's Research Capacity: The Gender Dimension](#), highlights the bias, stereotypes, lack of role models and mentors, and barriers within institutional practices and policies faced by women in research, which prevent their full participation.*
- *Recent research conducted by [Holly Witteman, Michael Hendricks, Sharon Straus and Cara Tannenbaum](#) demonstrates a gender bias in peer review processes, resulting in a 4% lower success rate for women when the focus of the review is on the calibre of the researcher versus the quality of the research being proposed.*