Innovation, Science and Economic Development Canada

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Canada

# The 50 – 30 Challenge

## What Works Toolkit: Guide to Sustaining Organizational Change

# Alignment with the Publicly Available Specification (PAS)

It is important to note that terminology is ever evolving and may not be reflected in external links and resources throughout the What Works Toolkit. The terms used within the toolkit align with the Publicly Available Specification (PAS) document developed by the Diversity Institute, and sponsored by the Standards Council of Canada in support of the Government of Canada's 50 – 30 Challenge. Section 3.1 in the PAS defines Equity-Deserving Groups as follows:

**3.1 Equity-Deserving Groups**

The Challenge's equity-deserving groups include those identifying as: Racialized, Black, and/or People of Colour ("Visible Minorities"), People with disabilities (including invisible and episodic disabilities), 2SLGBTQ+ and/or gender and sexually diverse individuals, and "Aboriginal" and/or Indigenous Peoples. The program and participants recognize First Nation Peoples, Métis Nation, and Inuit as founding Peoples of Canada and under-represented in positions of economic influence and leadership.

Please refer to the PAS for additional information on the 50 – 30 Challenge as well as tools and resources for your organization.

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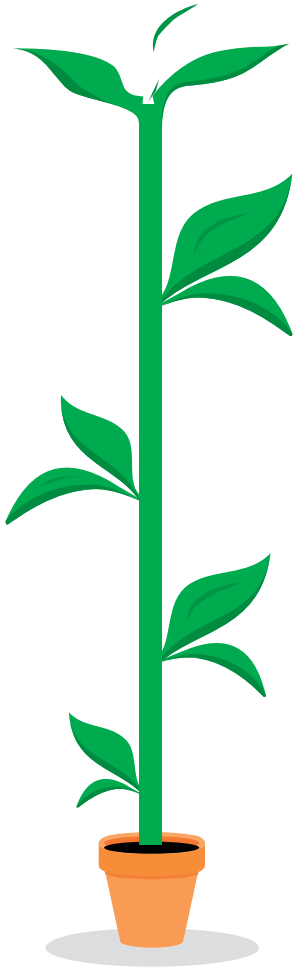


# Purpose of this Tool (1 of 2)

As leaders and board members of your organization, you support the creation of an environment that builds access to opportunity for everyone.

The purpose of this tool is to provide a guide to leaders and board members, as well as individuals that play a role in setting organizational strategy, policies and processes:

- This tool will help you reflect on current systems and structures in place
- This tool will deep-dive into different ways your organization's systems and structures can be adapted to be more inclusive
- There will be examples of actions you can take to help your organization build and sustain long-term change

Through this tool, you will gain a deeper understanding on:

1. How your organization can adapt systems and structures to create a sense of belonging for everyone
2. How your organization can sustain the change in the long-term through strategy, accountability, governance, and metrics

# Purpose of this Tool (2 of 2)

**How is this Relevant to the 50 – 30 Challenge?**

- ✓ Working towards the goals of the 50 – 30 Challenge requires everyone in the organization to have access to opportunity and resources.
- ✓ Leaders play a critical role in setting the organization's direction, building the culture, and sustaining organizational change.

Having the right systems and structures in place will create sustainable and successful organizations with top talent and a space where everyone feels welcome and safe.

# Key Takeaways for All Organizations

**1.0 Adapting Systems and Structures**

Board Recruitment: Consider the role you and systems play in recruiting new board members.

Training and Development: Consider training you can take as leaders to foster a culture of growth, respect, and inclusion.

Sponsorship and Mentorship: Consider the role you play in equitably sponsoring and mentoring board candidates.

Policies and Processes: Consider which policies and processes in your organization build access to opportunity.

**2.0 Sustaining the Change**

Embedding these values and long-term goals into strategy is critical to the overall impact the organization is aiming for.

Creating oversight and governance is needed to put the strategy in place and sustain it.

To know whether and how we are achieving the goals of the 50 – 30 Challenge and building belonging in our organizations, we need to measure and track progress.

# What Does this Mean for Small / Medium Organizations? (1 of 2)

**1.0 Adapting Systems and Structures**

- **Board Recruitment:** Hold people who lead HR functions accountable for embedding equity, diversity and inclusion (EDI) in talent processes and in leadership recruitment
- **Training:**
  - Offer formalized EDI training to all employees free of charge to establish a respectful workplace where everyone is treated equitably
  - Implement formal training for HR function to support them in embedding an EDI lens in talent processes
- **Mentorship:** Pair leaders with employees or have small coaching groups to support employees in their career advancement
- **Policies and Processes:** Where there are informal policies and processes in place, consider how your organization can accommodate employee needs and flexibility in the workplace (e.g. parental leave)

# What Does this Mean for Small / Medium Organizations? (2 of 2)

**2.0 Sustaining the Change**

- **Continue to expand commitment and investment to EDI** as your organization grows and there are increased resources (e.g. time, money, people) to support EDI initiatives
- **Assign accountability to teams or employee pairs** to EDI goals / initiatives related to the overall strategy and link to their performance reviews and tracking progress
- Host **regular internal leadership meetings** specifically focused on discussing EDI progress

# What Does this Mean for Large Organizations? (1 of 2)

**1.0 Adapting Systems and Structures**

- **Board Recruitment:** Participate in partnership programs to source candidates from non-traditional channels
- **Training:**
  - Provide multi-modal opportunities for employees to find training that interests them in addition to formalized training offered to all employees, (e.g. online courses, workshops, etc.)
  - Hold regular learning sessions for board members and leaders on different EDI topics (e.g. racism, privilege)
- **Mentorship:** Put a formal mentorship program in place where leaders are paired with employees to support their career advancement
- **Policies and Processes:**
  - Allocate resources to EDI initiatives (e.g. partner with organization to put an anonymous hotline in place)
  - Ensure formalized processes consider access for everyone
  - Offer flexible working arrangements and other benefits where possible (e.g. reimburse employees for tuition)

# What Does this Mean for Large Organizations? (2 of 2)

**2.0 Sustaining the Change**

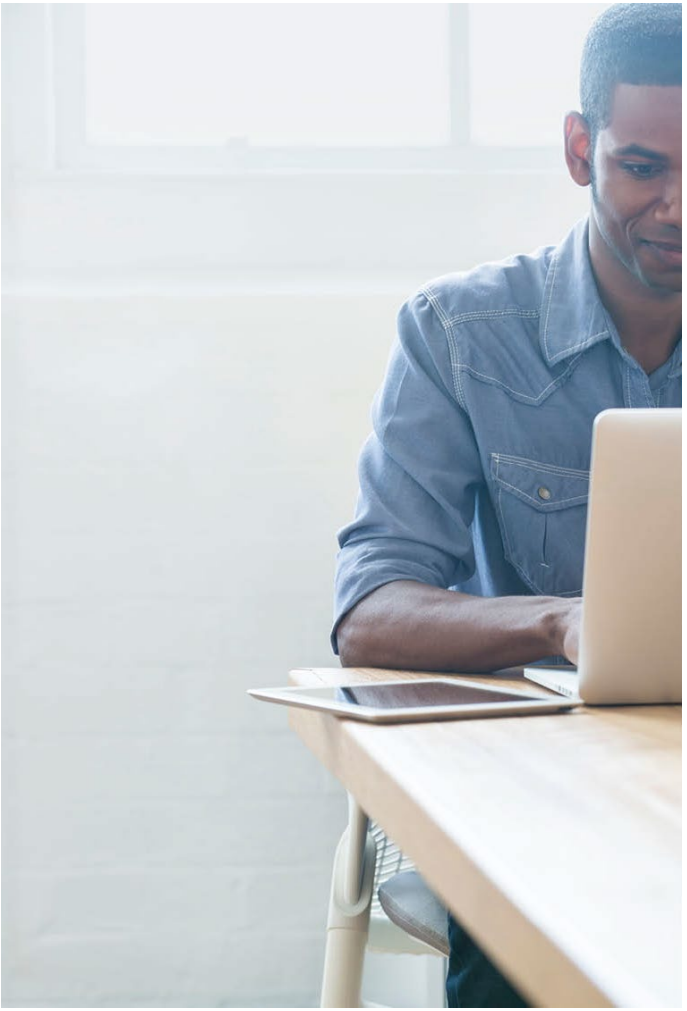
- **Discuss EDI within the organization's strategy and goals** within different forums (e.g. meetings, Town Halls, email communications, etc.)
- **Assign accountability to teams** to EDI goals / initiatives related to the overall strategy and link to their performance reviews
- Take an active role in ensuring there are **formal governance structures in place** (e.g. lines of communication, decision-making processes)
- **Collect self-identification data** to better understand employee demographics and experiences, and put tools and infrastructure in place to support all steps of the data management lifecycle

# Scenario: Meet Jean

Jean is a Finance leader for a pharmaceutical manufacturing organization.

Jean read the Board and Leader Guidebook to learn more about the role of leaders in promoting EDI and ultimately achieving the goals of the 50 – 30 Challenge. They now want to understand how to sustain the organization's culture transformation by adapting systems and structures in place.

Jean is going to explore the Guide to Sustaining Organizational Change tool to learn more.



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# 1.0 Adapting Systems and Structures to Build Access to Opportunity

# 1.1 Board Recruitment (1 of 5)

**As board members and leaders of the organization, it is important to consider the role you play in recruiting new board members and the systems in place to attract and retain leaders.**

The following are actions you can take as leaders to support the recruitment of members from the five priority groups into board positions:

- **Recognize gaps in skillset and experience:** Boards need to look at their communities to see who their customers are, who they are serving, and who needs to be represented to recognize where there are gaps and source talent accordingly. It is important that the board accurately reflects the people and culture in the organization as well as the communities it serves.

**Case Study**
**Large Organization: Estée Lauder Companies Inc.**

In 2020, Estée Lauder Companies Inc. committed to ensure the percentage of Black employees at all levels within the organization mirrored the percentage of Black people in the United States population over the next five years.

The organization also pledged to double its recruits from historically Black colleges and universities over the next two years.

**Link to:**
- Talent Processes Tool – Sections 2.3 and 6.1

# 1.1 Board Recruitment (2 of 5)

- **Expand the talent pool:** Broaden the talent pool to expand and ensure access of opportunity to qualified candidates from the 5 priority groups. This can be done through:
  - Sourcing candidates through non-traditional channels
  - Being aware of how you can remove as many barriers as possible

**People with disabilities Callout:**

- Key considerations can include the format of your application, language used in job descriptions, and online accessibility when candidates apply for jobs

  - Implementing greater sponsorship in the organization
  - Partnering with talent agencies / community organizations to source candidates from the five priority groups

**Link to:**

- Talent Processes Tool – Sections 2.3 and 6.1

# 1.1 Board Recruitment (3 of 5)

- **Implement partnership programs**: Task board members to contribute towards recruitment and bring new members on board from mentorship programs they participate in. Think beyond traditional choices, and highlight the importance and benefits of giving new candidates opportunities to have their first board experience.

**Women and/or non-binary individuals Callout:**

- Leaders who have the expertise can open up their networks to those who are board ready, but don't have the same access. For example, the program, Catalyst Women on Board, provided women who were board ready with access to a network of board members. Board members were paired with women who were ready for board positions and mentored them to further support their development. Review the accompanying case study on this slide for more details.

**Case Study**
**Small/Medium Organization: Catalyst Women on Board**

The Catalyst Women on Board was a mentorship-sponsorship program aimed to increase the number of women on corporate boards.

Mentors-sponsors were board directors and CEOs that are committed to advancing diversity on boards. Each of them actively mentored and sponsored a board-ready and CEO-endorsed woman to help grow her connections and raise her profile as a qualified board candidate. Through this program, women filled over 230 corporate board positions.

**Link to:**
- Talent Processes Tool – Sections 2.3 and 6.1

# 1.1 Board Recruitment (4 of 5)

**Consideration(s) for Intermediate / Advanced Organizations:**

- **Implement Shadow Boards:** Shadow boards offer organizations the opportunity to reinvent their business models, redesign processes, and transform aspects of their organizations. They consist of a group of non-executive employees that work with more senior employees and leaders on initiatives within the organization. A shadow board allows more junior employees to contribute their insights in an open space and brings in different perspectives than senior employees may be used to.

**Link to:**
- Talent Processes Tool – Sections 2.3 and 6.1

# 1.1 Board Recruitment (5 of 5)

**Case Study**
**Large Organization: Gucci**

When faced with a decline in sales due to changing consumer preferences, Gucci implemented a shadow board comprised of millennial professionals across different functions within its organization who meet regularly with the executive team. The shadow board helped the executive team work through issues the organization was facing, specifically related to making the brand more relevant to a younger market. After implementing the insights brought forward by the shadow board and improving the organization's digital and internet strategies, Gucci's sales grew by 136%.

**Case Study**
**Large Organization: Accor S.A.**

Facing pressure from competitor, AirBnB, and failed marketing attempts to acquire more customers, French hospitality company Accor recognized the need to reinvent its business model. A shadow board was created to develop a brand for millennials. The shadow board developed a new brand, Jo&Joe, focused on combining hotel comfort with the friendly, budget-conscious atmosphere of a youth hostel. The shadow board also developed Accor Pass, a hotel subscription for people under 25 that provides them with a place to stay while they search for permanent housing.

**Link to:**
- Talent Processes Tool – Sections 2.3 and 6.1

# 1.2 Training and Development (1 of 3)

**An important consideration to sustain organizational change is continued education for those who are decision-makers as it takes time to put learned actions and behaviours into practice. Below are two types of training that board members and leaders can participate in to foster an environment focused on respecting the differences of others.**

**1. Board-Specific Training:**

a) Training to help new board members grow and get support they need to succeed
   - Recruiting diverse board members is not about “checking a box”; it is about supporting the transition of women and/or non-binary individuals, Racialized, Black, and/or People of Colour, 2SLGBTQ+ and/or gender and sexually diverse individuals, People with disabilities, and “Aboriginal” and/or Indigenous Peoples into board positions
   - Finding ways to educate people to be a good board member and support their fellow new board members to be successful is critical to the success of the board

b) Training to align on expectations, behaviours and goals of existing and new board members

**Key action callout:** Think about the board’s comfort around talking about the “why” of setting some of these strategies.

- Why do you want to recruit members in our community?
- What will you do to ensure members of our community feel comfortable?

**Link to:**
- Starting the Conversation – Section 6.0
- Talent Processes Tool – Section 6.1

# 1.2 Training and Development (2 of 3)

**2. Formalized EDI Training:**

Board members should partake in the following formal EDI training:

- Inclusive leadership training: Training on how to become an inclusive leader
- Unconscious bias training: Training on how to become aware of unconscious bias and how to recognize your own biases

Here are two learning modules you can take:
- Unconscious Bias Learning Module
- Psychological Safety Learning Module

**Callouts:**

Cultural competency training:

- "Aboriginal" and/or Indigenous Cultural Competency Training
- Anti-racism training: some boards offer anti-racism training to leadership and board members
- Training on gender identity and expression
- Training to increase awareness of people identifying as having disabilities

**Link to:**
- Starting the Conversation – Section 6.0
- Talent Processes Tool – Section 6.1

# 1.2 Training and Development (3 of 3)

**Case Study**
**Large Organization: Ontario Public Service**

The province of Ontario offers The Ontario Indigenous Cultural Safety Training (ICS) Program, a provincial program administered by Southwest Ontario Aboriginal Health Access Centre.

The Ontario ICS Program is focused on supporting the health transformation for of Indigenous Peoples, which is aligned to the health and social service systems transformation ongoing in Ontario. The purpose of this training is to improve healthcare experiences for Indigenous peoples by educating healthcare workers across the Local Health Integration Networks (LHINs) on the unique history and challenges facing Indigenous people so that they can better support them.

These E-Learnings offered by CCRW provide training on inclusive disability practices in the workplace.

**Link to:**
- Starting the Conversation – Section 6.0
- Talent Processes Tool – Section 6.1

# 1.3 Sponsorship and Mentorship (1 of 4)

**As board members and leaders of the organization, it is important to consider the role you play in equitably sponsoring and mentoring potential board candidates.**

A sponsor is someone who talks about you in decision-making spaces and advocates for you using their own professional capital to help progress your career forward. Implementing formal mentorship and sponsorship programs enhances employee engagement and retention, improves employee performance, and promotes a culture of talent recognition and support.

**Women Callout:** Men are 50% more likely to attribute their advancement to a senior leader's support than women are. However, 80% of companies do not have a formal sponsorship program. Women candidates with high potential are often over-mentored and under-sponsored.

**Link to:**
- Talent Processes Tool – Sections 3.1 and 6.1

# 1.3 Sponsorship and Mentorship (2 of 4)

**Case Study**
**Large Organization: Abbott**

Abbott places a large emphasis on mentorship and sponsorship within its organization. The focus is not only on hiring diverse employees, but developing them for growth.

In the organization's 2020 Diversity, Equity, and Inclusion Report, an employee who identifies as Latino credits his mentors and sponsors for supporting his career growth. He indicated that the fact they didn't look like him made their support more meaningful. To pay it forward, this employee now acts as a mentor and sponsor to others in the organization. As a result of his dedication and support, he has won the President's Award for his work to advance EDI within the organization.

**Case Study**
**Large Organization: Bank of Montreal (BMO)**

In 2014, BMO launched an Enterprise Sponsorship Program. Senior leaders are paired with employees from priority groups who have been identified as candidates for leadership positions. Sponsors advocate on behalf of these employees, provide them with visibility, and help them foster connections that lead to development opportunities. Different business units across the bank have implemented this program to advance the pipeline of diverse talent throughout the organization.

**Link to:**
- Talent Processes Tool – Sections 3.1 and 6.1

# 1.3 Sponsorship and Mentorship (3 of 4)

As **board members**, you can take the following actions within your organization:

- Support the implementation of a formal sponsorship program, where managers and above are paired with employees from the five priority groups
- Get board members committed to sponsoring and mentoring board candidates from the five priority groups, with the goal to recruit them to the board
- Enable and support the success of potential board candidates from the five priority groups
    - For example: Pair yourself with a high potential board candidate and sponsor them when they apply for a board position
    - For example: Help and encourage new board members where you can, such as with board meeting preparation and sharing their points of view

Calling board members and leaders in Western Canada! Sign up to be a mentor to a newcomer to Canada or to learn how to create a mentorship program within your organization.

**Link to:**
- Talent Processes Tool – Sections 3.1 and 6.1

# 1.3 Sponsorship and Mentorship (4 of 4)

As **leaders**, you can take the following actions within your organization:

- Implement a formal sponsorship program, where managers and above are paired with employees from the five priority groups
- Get managers on board and committed to mentoring employees from the five priority groups by highlighting benefits to both them and the organization
- Advise mentors to encourage employees from the five priority groups to apply for leadership positions or promotions as they are less likely to do so
- Promote the skills, talents, and ability of the individual you are sponsoring, and help them work through mistakes
- Reach in at key moments and encourage, even nudge, towards the next role

**Women and/or non-binary individuals Callout:** Engage male employees to be allies. Allies will initiate and participate in open and honest conversations about equity, diversity and inclusion, advocate for gender equity, and encourage greater sensitivity in the workplace.

**Key action callout:** Think about how you, as a leader in the organization, promote, sponsor, and enable career success.

**Link to:**
- Talent Processes Tool – Sections 3.1 and 6.1

# 1.4 Policies and Processes (1 of 6)

**The following policies and processes can be put in place to adapt systems and structures to build access to opportunity:**

- **Candidate development:** Create development opportunities for less experienced individuals to be on the board (e.g. pair a candidate with a senior leader to learn the ropes and prepare them for a board position).
- **Meeting policies:** Ensure board members use inclusive language during meetings and pay attention to the distribution and fairness of speaking time.
  - Example: Whoever is leading the board also has the responsibility of ensuring that quieter board members speak up in board meetings.
- **Term limits:** Put term limits in place to remove barriers for new board members to be recruited.
- **Anonymous hotlines:** Put anonymous hotlines in place so employees have a safe space to report their concerns without fear of reprisal.

**Safe Space** is defined as: "A place intended to be free of bias, conflict, criticism, or potentially threatening actions, ideas, or conversations" – Source: Merriam-Webster

**Link to:**
- Talent Processes Tool – Section 6.1

# 1.4 Policies and Processes (2 of 6)

- **Creating networking opportunities that are accessible to everyone:** Oftentimes, there are barriers to networking opportunities such as after-work socials and sports events. Make these opportunities accessible and be intentional about what opportunities are available, both formal and informal. Examples include:
  - If you're inviting people to an after work social, indicate there will be drinks AND snacks to include those who may not drink.
  - Invite everyone to a sporting event so everyone feels invited to participate.
  - Casual chat in the office about sports may exclude those who are not interested in sports. Bring people into the conversation and ask what they are interested in.
- **Performance expectations for board members and leaders:** Incentivize board members and leaders by tying their roles and responsibilities to achieving the goals of the 50 – 30 Challenge and holding them accountable for modelling inclusive and respectful behaviours.
- **Allocate resources:** Ideally, your organization should allocate resources to EDI training and development and provide board members and leaders with the tools to be successful in advancing EDI in the organization and in reaching the goals of the 50 – 30 Challenge. Resources should also be linked to driving accountability, and reviewing and putting these policies and processes in place.

**Link to:**
- Talent Processes Tool – Section 6.1

# 1.4 Policies and Processes (3 of 6)

**Case Study**
**Small/Medium Organization: Beehive Strategic Communications**

Beehive has revamped its policies and processes to ensure its values and commitments to social impact are reflected and that they contribute to a workplace where people feel safe and included regardless of identity.

The organization has updated its EDI policy, and added two new policies focused on inclusion and belonging: a Pay Equity Policy and a Whistleblower Policy. Beehive has also replaced all singular and first person pronouns with “their/theirs” in its employee handbook and brand standards to respect and honour how all employees identify.

- **Recognize and abide by Canadian laws and regulations:**
  - **Comply or Explain:** Ontario Securities Commission (OSC) requires most companies listed on the TSX to disclose their policy for identifying and nominating women directors, and whether there are targets at either the board or executive level. If not, they must explain why.
  - **Bill C-25:** Amendment to federal and most provincial Corporations Acts that requires certain companies to disclose policies and practices related to diversity on the board of directors and within senior management for all annual meetings held on or after January 1, 2020.

**Link to:**
- Talent Processes Tool – Section 6.1

# 1.4 Policies and Processes (4 of 6)

**Consideration(s) for Private Organizations:**

- Today's investors are increasingly evaluating if the opportunities they are investing in are socially conscious and meet Environmental, Social, Governance (ESG) criteria. Consider how your organization's efforts show a commitment to social purpose and EDI.
- Certain Canadian regulations (e.g. Comply or Explain and Bill C-25) require publicly traded companies to disclose diversity on their boards and in senior leadership positions. Consider how your organization is meeting these requirements by making progress towards the 50 – 30 Challenge.

Read this survey about policies and practices to create an inclusive workplace for transgender employees in the workplace (available in English and French), written by the Institute for Gender at the Economy and Pride at Work Canada.

**Link to:**
- Talent Processes Tool – Section 6.1

# 1.4 Policies and Processes (5 of 6)

- **Offer flexible policies:** Ideally, your organization should provide flexibility in policies, such as flexible working arrangements and other policies to accommodate employee needs (e.g. parental leave, health coverage, tuition reimbursements, etc.)

**Consideration(s) for Intermediate / Advanced Organizations:**

- **Provide employees with flexible policies, benefits and expense coverage:** Ideally, your organization should provide employees with flexibility to use benefits and funds that support their needs. Your organization can consider the following examples:
  - Reimburse employees for certifications or courses employees choose to take for their professional development
  - Provide employees with paid time off to volunteer for causes they are passionate about
  - Offer additional health coverage where possible (e.g. expense coverage for transitioning employees)

**Link to:**
- Talent Processes Tool – Section 6.1

# 1.4 Policies and Processes (6 of 6)

**Case Study**
**Small/Medium Organization: Association of Alberta Forest Management Professionals (AAFMP)**

AAFMP's Accommodation of Religious Observances Policy provides their employees with options to observe holidays outside of the provincially legislated holidays in addition to supporting individuals to exercise other religious observances. Three statutory holidays have been identified as flexible for employees to recognize other religious holidays, showing AAFMP's recognition of all cultural beliefs.

To ensure representation on its Board, AAFMP uses a skills and diversity matrix and Terms of Reference for the Nominating Committee. The skills and diversity matrix ensures Board members have a balanced ratio of experience/expertise as well as community perspective. The Terms of Reference seek to help the Nominating Committee identify and recruit qualified and skilled individuals on a continual basis, and include term limits, meeting policies, and composition policies.

**Link to:**
- Talent Processes Tool – Section 6.1

# Adapting Systems and Structures: Regional and Industry Considerations (1 of 3)

**Industry: Mining**

According to a report from Osler, in 2021, only 19% of director positions were held by women in the mining industry, which has consistently held the lowest proportion of women in leadership positions over the last few years. Organizations can implement the following programs and practices to increase representation of women and other priority groups:

- Leaders can participate in mentorship programs (e.g. International Women in Resources Mentorship Program), where mining leaders can be paired with mentees in various mining roles and across the mining cycle, providing mentees with access to social networks and higher visibility
- Contribute to Women in Mining newsletter published by the Mining Association of Canada (MAC) to highlight women in leadership and at site level
- Use the standard on Indigenous and Community Relationships developed by MAC to educate leaders and employees at mine sites on the history of Indigenous Peoples, and train them on cultural competency, anti-racism, conflict resolution, and human rights

# Adapting Systems and Structures: Regional and Industry Considerations (2 of 3)

**Industry: Manufacturing**

In an industry typically dominated by men, organizations within manufacturing can put the following policies and practices in place to attract more diverse employees into the industry and create an inclusive workplace:

- Where possible, adjust shift-based jobs to provide employees with flexible work arrangements and better work-life balance
- Create a Panel Diversity Policy – only allow employees to participate in panel discussions if there is equal representation. For example, only allow employees to participate in panel discussions where panelists include women and those who identify as women
- Seek employee feedback anonymously – not all employees may be comfortable speaking up, so providing an anonymous forum will allow them to voice any issues or concerns

# Adapting Systems and Structures: Regional and Industry Considerations (3 of 3)

## Industry: Education

The following trends are shaping the education industry, and educational institutions can consider them when adapting their systems and structures to be more inclusive:

1. There is an increased focus on reshaping education systems to be more accessible and inclusive. Educational institutions can think through different methods of teaching, how to provide more opportunity for students, and the role that staff play in supporting students from priority groups.
2. Dedicated resources and offices are being put in place to embed an equity lens within the educational industry and transform the system to better support priority groups. More emphasis is also being placed on holding leaders accountable to address inequities and support staff and students.
3. Post-secondary institutions are incorporating Truth and Reconciliation Commission of Canada (TRC) Calls to Action (Numbers 62 – 65) by placing greater emphasis on teaching Indigenous current realities, history, and incorporating Indigenous knowledge systems into methods of teaching and curricula.

**Case Study**
**Small/Medium Organization: NorQuest College, Humber College, Douglas College, and Autism CanTech! Program**

The Autism CanTech! Program supports professionals with Autism in getting employed. This program focuses on removing barriers and creating inclusive and accessible work environments. The program runs for six months and prepares participants for roles in data processing in various industries, such as education, financial, and government. Throughout the program, participants are also paired with a career coach to help them prepare for employment.

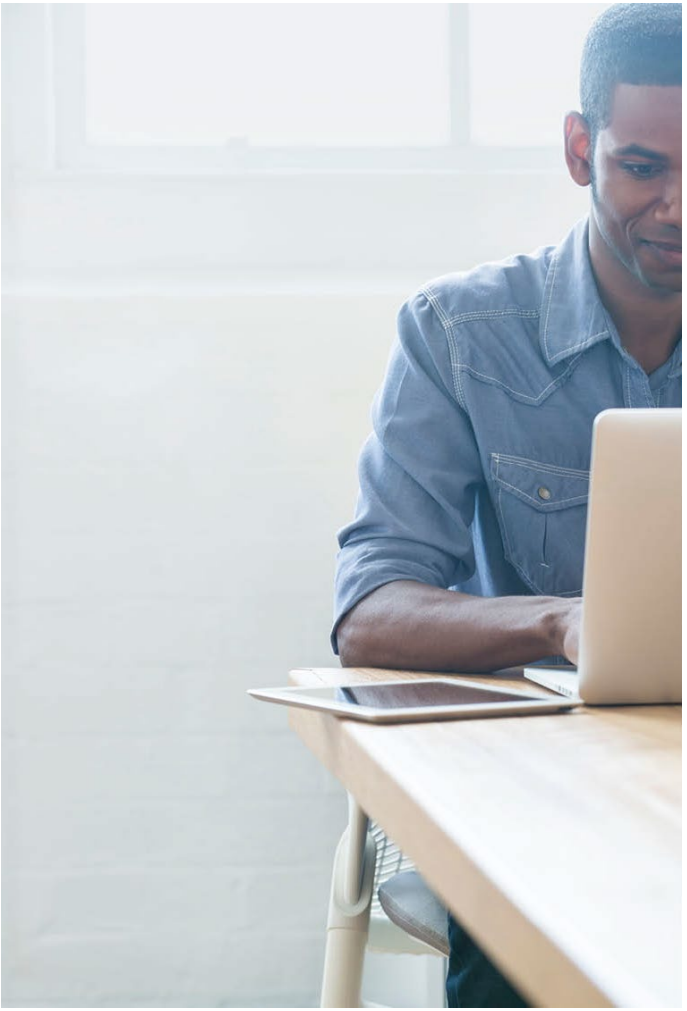
This program is hosted at three educational institutions across Canada: NorQuest College, Humber College, and Douglas College.

# Scenario: Checkpoint 1

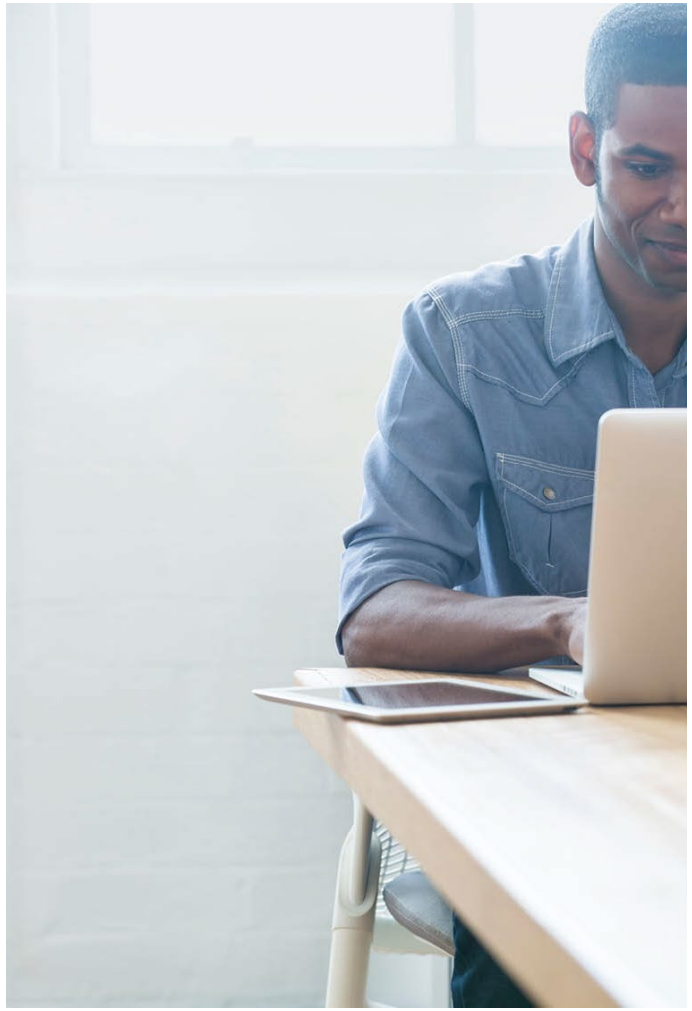
Jean wants to ensure that policies and processes in place accommodate employee needs and offers them flexibility. One of their employees is Jewish and wants to take a day off to celebrate Yom Kippur. She does not know if she can take the day off, however, as the organization only offers sick days and statutory holidays as paid days off. This employee approaches Jean, asking for their advice on how she can take a day off from work to observe this holiday.

**What actions can Jean take to model equitable and inclusive behaviour? Select all that apply.**

- ❑ Tell their employee to use a sick day to observe the holiday
- ❑ Apologize to the employee that she cannot take the day off
- ❑ Discuss, as a leadership team, ways the organization can create a policy that offers employees flexible paid days off
- ❑ Ask HR to make an exception for this employee to take the day off



# Scenario: Checkpoint 1 (Solution)



Jean wants to ensure that policies and processes in place accommodate employee needs and offers them flexibility. One of their employees is Jewish and wants to take a day off to celebrate Yom Kippur. She does not know if she can take the day off, however, as the organization only offers sick days and statutory holidays as paid days off. This employee approaches Jean, asking for their advice on how she can take a day off from work to observe this holiday.

**What actions can Jean take to model equitable and inclusive behaviour? Select all that apply.**

- ❑ Incorrect: Tell their employee to use a sick day to observe the holiday
- ❑ Incorrect: Apologize to the employee that she cannot take the day off
- ❑ Correct: Discuss, as a leadership team, ways the organization can create a policy that offers employees flexible paid days off
- ❑ Incorrect: Ask HR to make an exception for this employee to take the day off

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# 2.0 Sustaining the Change and Building Accountability

# 2.1 Strategy (1 of 3)

**It is important to acknowledge that inclusive organizational change is a journey and a sustained effort is needed to move this forward both in the short and long-term. Embedding these values and long-term goals into strategy is critical to the overall impact the organization is aiming for.**

As leaders and board members, you can take the following actions to embed the goals of the 50 – 30 Challenge into your organization's strategy:

1. Reflect and discuss your organization's strategy and goals using the following questions:
    - What are your organization's long-term goals? In what ways do they align to equity, inclusion and belonging?
    - Do your strategy, values and vision align with the 50 – 30 Challenge and if so, how? If not, why not and how could they be?

    **Key action callout:** Make these connections explicit so that it is clear to employees within the organization and stakeholders outside the organization.

    - Does your strategy align to your overall governance?

# 2.1 Strategy (2 of 3)

**Consideration(s) for Public Sector Organizations:**

- Reflect on your organization's relationships with clients, customers, partners, and suppliers to understand if they are committed to creating an inclusive environment for their employees, have shared values with your organization, and if their practices, policies and processes are equitable and inclusive. Additionally, think about how you can communicate your organization's commitment to EDI to these clients, partners and suppliers. Examples can include:
  - Add an Equity, Diversity, Inclusion, Discrimination, and Harassment Policy addendum to all client contracts and ask all contractors and suppliers to review and agree to this
  - Review your list of vendors and suppliers and ensure they are diverse and priority groups are represented

# 2.1 Strategy (3 of 3)

2. Shift what “good” looks like and what your board and leadership skills and requirements are

**Key action callout:** Think about how you recruit individuals to the board and in leadership positions – do they match your strategy goals and do they cover the functions and areas you need help in? Has this shifted over time?

- Broaden the range of professional backgrounds considered for board member positions. Avoid filling open seats with people already in your personal/professional networks as this raises the risk for unconscious bias.

**Women Callout:**

- Consider expanding recruitment to access sources of functional diversity that women typically have experience in.
- Women are more likely to bring knowledge and expertise in fields such as management, human resources, sustainability, corporate governance, regulatory/legal/compliance, and political/government. They also often have more types of functional expertise. Of the most underrepresented board skills overall, 80% of skills were most likely to be held by women than men.
- Increasing the representation of women on boards will increase board diversity given their unique skillset, thus increasing the effectiveness of the board and, as a result, increasing the value of the firm.

- Conduct a skill needs analysis – look at the skills you ideally want on the board, given the business, and then the skills you have. What is missing and what is needed?

# 2.2 Governance (1 of 3)

**To put the strategy in place and sustain it in the long-term, governance and oversight is needed.**

1. Consider how governance structures can support the organization in achieving its vision and long-term strategy.
    - Who should be part of the structure? What does the board structure look like? Are there other committees within the organization focused on EDI?
    - Where are the lines of communication? In what ways are they formalized?
    - What does accountability look like? Are different pieces of the strategy owned by members across the organization?
    - Is the EDI strategy embedded within the overall strategy and viewed as a cultural shift/transformation?
    - How do leadership and the board interact? What kind of interactions exist between leadership and the board with employees?

# 2.2 Governance (2 of 3)

2. Within the overall governance structure, consider all layers of an organization, and their interactions with the strategy, particularly focusing on the following functions:
   - Organizational Structures: Different functions and teams that make up the organization

**Key action callout:** Consider this model to embed equity and inclusion into your organizational structure

- Make sure the leader(s) accountable for this area of focus has the authority to make the change
- Make sure employees are given equitable development opportunities to advance their career – build that into processes and change processes to ensure this where needed
- Build incentives and enable managers to drive culture changes through effective policies that enable inclusion and build consistency as well

   - Decision-Making Processes: Processes and approvals required to make decisions
   - General Roles and Responsibilities: Staff, People Leaders, Executives and Sponsors

# 2.2 Governance (3 of 3)

**Consideration(s) for Non-Profit Organizations:**

- Research suggests, where possible, to adjust decision-making processes to be collaborative. Ensure decision-making processes consider all priority groups and that everyone feels their voices are heard and valued when decisions are made. Including members from all levels of the organization will enable and empower them, and they will be able to provide input on challenges they may be facing.

# 2.3 Tracking and Measuring Progress (1 of 4)

**To know whether and how we are achieving the goals of the 50 – 30 Challenge and building belonging in our organizations, we need to measure and track our progress. Without that understanding, there is no clear way of knowing how we are working towards our vision and strategy.**

1. Use data to assess gaps and report on a regular basis (at least on a semi-annual basis)
    - Identify data that you need to gather (e.g. organizational level, retention, engagement, turnover, self-identification, etc.)
    - Gather data required to conduct gap analysis
    - Analyze representation at the leadership and board levels – it is important for employees to feel seen and represented in their leadership (both in values and in intersectional identities)
    - Go to Section 2.3a in this tool, the Guide to Sustaining Organizational Change, to learn more about collection and management of self-identification data

**Link to:**
- 10 Actions You Can Take – Section 3.0
- Starting the Conversation – Section 6.1

# 2.3 Tracking and Measuring Progress (2 of 4)

2. Build ownership and assign accountability
   - Who (or which team) is the owner of different initiatives? What activities are being done to work towards that long-term goal?
   - How is performance tied to equity and inclusion?
   - Build ownership for leaders and board members to move this strategy and vision forward by tying leader and board roles and responsibilities to specific parts of this strategy and tracking progress in moving these goals forward through their performance evaluations

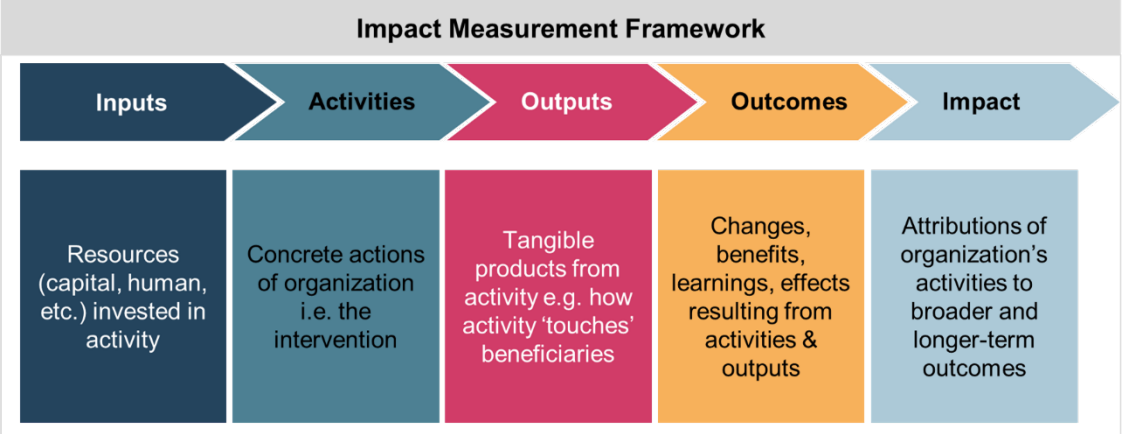
3. Tie the data you are collecting to strategic initiatives to track progress

**Link to:**
- 10 Actions You Can Take – Section 3.0
- Starting the Conversation – Section 6.1

# 2.3 Tracking and Measuring Progress (3 of 4)

**Consideration(s) for Intermediate / Advanced Organizations:**

4. Use an Impact Measurement Framework to measure progress against goals and the overall organizational strategy
   - This framework allows your organization to track progress in a data-driven way towards the overall strategy
   - It helps your organization understand what types of data you need to track progress, by breaking down different steps and strategic initiatives required to achieve the overall strategy
   - This framework allows different owners and teams to understand how much progress they are making towards the overall goal and if any changes need to be made (e.g. collect different pieces of data)




**Link to:**
- 10 Actions You Can Take – Section 3.0
- Starting the Conversation – Section 6.1

# 2.3 Tracking and Measuring Progress (4 of 4)

**Consideration(s) for Intermediate / Advanced Organizations:**

5. Incorporate an Inclusive Lens throughout the Data Management Cycle
   - Ensure different stakeholder perspectives and voices are incorporated in the design, collection, and reporting of data
   - Incorporate diverse perspectives in all aspects of the data management lifecycle to improve decision-making and ensure it is inclusive
   - Embed an inclusive lens into the design and testing of products and services to assess for the potential of bias

Gender-Based Analysis Plus (GBA+) is the analytical process by which a policy, program, initiative or service can be examined for its impacts on various groups of women and men. GBA+ aligns with the principles outlined in the Canadian Charter of Rights and Freedoms and the Canadian Human Rights Act. The Government of Canada is committed to supporting the full implementation of GBA+ across federal departments and agencies.

**Link to:**
- 10 Actions You Can Take – Section 3.0
- Starting the Conversation – Section 6.1

# 2.3a Guidance on Self-Identification Data (1 of 2)

**As part of measuring and tracking progress, organizations can collect self-identification data. It is important to make it clear to people why you are collecting this data and how it will be used.**

Reasons why self-identification data should be collected and how it will be used:

- Help organizations have conversations about EDI-related goals and creating a welcoming environment for everyone
- Understand success of EDI efforts and success in creating a space where everyone feels welcome
- Analyze gaps to understand what programs need to be created and which resources to provide
- Evaluate equity of policies and processes
- Measure employee engagement
- Measure success of EDI initiatives
- Maintain compliance with regulation to report on representation of the four designated employment groups in the *Employment Equity Act*

# 2.3a Guidance on Self-Identification Data (2 of 2)

**Case Study**
**Large Organization: Ontario Power Generation**

In 2021, Ontario Power Generation (OPG) launched an expanded employment equity workforce demographic census that included new educational and data collection functions and categories. This expanded collection of data will allow the energy company to improve upon their analysis and reporting, identify robust insights into their workforce, and improve upon their EDI approaches to programming, recruitment, and advancement. In the first six months, the census exceeded the number of responses received in the 10 years prior, signaling employees' increased willingness to self-identify.

This is an example of a self-identification survey from the Canadian Human Rights Commission which provides guidance on how to collect self-identification data.

# 2.3b Data Management Lifecycle (1 of 3)

| Stage | Activities |
|---|---|
| **1. Creation and Collection** | • Identify the purpose, objective and intended uses of the information<br>• Select the appropriate data elements to be collected so that it is fit for purpose<br>• Notify individuals about the collection, the purpose/objective and intended uses of that data<br>• Include language at the point of collection to indicate that providing self-identifying data is voluntary, and providing it serves as consent for its use for the specified purposes<br>• There should never be repercussions or retaliation for an individual deciding not to provide self-identifying data<br>• Limit data collection to scope and scale of disclosed purposes and uses<br>• Use multiple choice response format. Include options ‘prefer not to answer’ and ‘I don’t know’ and allow for checking off multiple boxes. Do not use “free text” response format.<br>• Ensure that self-identifying information is anonymous |

# 2.3b Data Management Lifecycle (2 of 3)

| Stage | Activities |
|---|---|
| **2. Storage** | • Ensure the self-identifying information is protected by the appropriate physical, organizational, and technological controls corresponding to its level of sensitivity<br>• Clarify roles and responsibilities to ensure who does what, when, and how in the event the self-identifying information is subject to a security breach<br>• Ensure that you abide by the rules relating to that client and data as it relates to transferring it across borders |
| **3. Usage** | • Ensure the self-identifying information is used only for disclosed purposes and uses<br>• When aggregating / grouping data for analysis, consider a minimum sample size to maintain confidentiality and anonymity, otherwise there is a risk that a specific respondent could be identified / linked back to their responses |

# 2.3b Data Management Lifecycle (3 of 3)

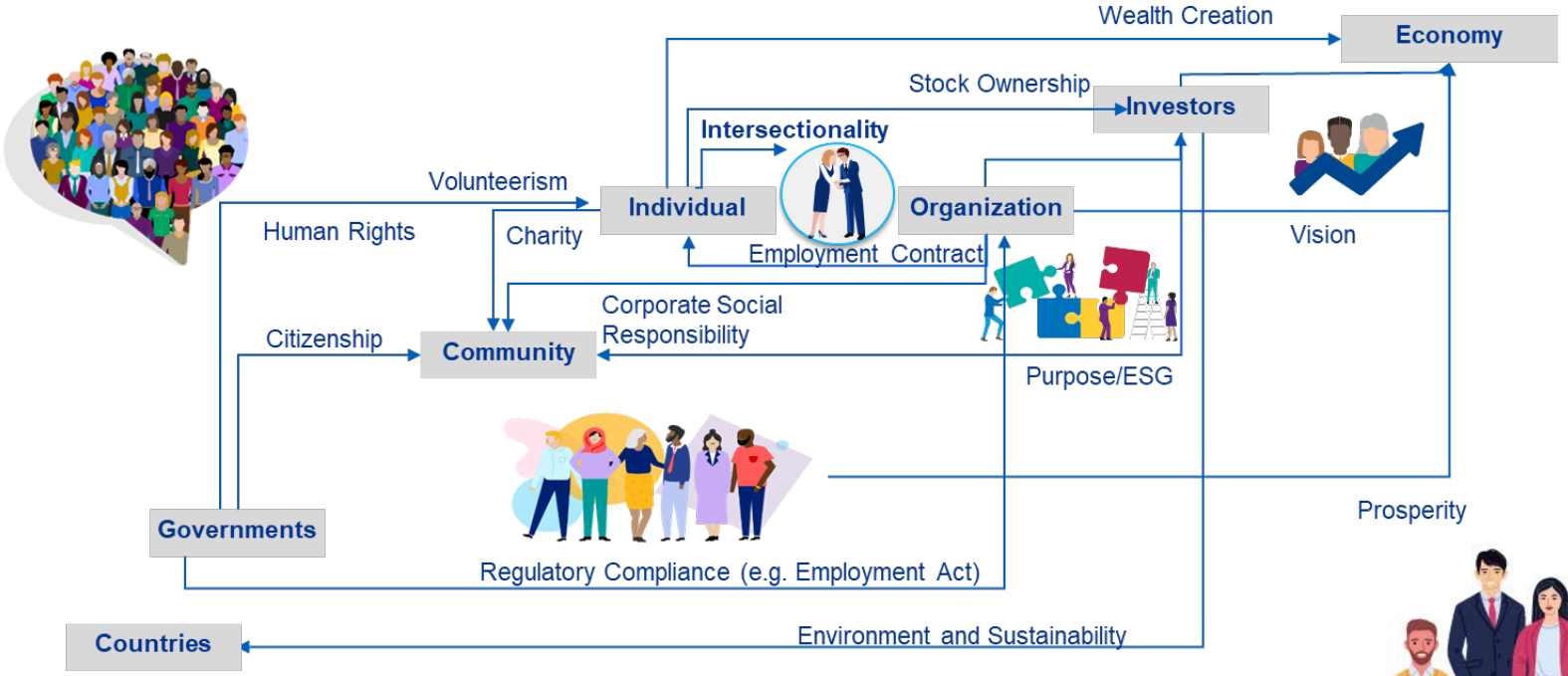
| Stage | Activities |
|---|---|
| **4. Archival** | • Ensure the self-identifying information is protected by the appropriate physical, organizational, and technological controls corresponding to its level of sensitivity<br>• Clarify roles and responsibilities to ensure who does what, when, and how in the event the self-identifying information is subject to a security breach |
| **5. Destruction** | • Ensure the information is properly disposed once retention period has expired<br>• A person should always have a convenient way to ask for their information to be deleted |

# 2.4 Who Can My Organization Engage With?

There are various internal and external stakeholders that can be involved in decision-making and consultation. It is important that the voices of the community are heard and brought to the decision-making table. The below diagram outlines the complexity of intersectionality and the different cross-roads between these stakeholders. It also highlights how decisions can influence various social, economic, political and community impacts.

**Intersectionality** is defined as:

A framework for understanding how different aspects of a person's social and political identities (e.g., gender, race, class, sexuality, ability, physical appearance, etc.) combine to create unique modes of discrimination and privilege. Intersectionality identifies advantages and disadvantages that are felt by people due to this combination of factors – Source: Kimberlé Crenshaw, TIME



# 2.4.a How Do We Engage With Stakeholders? (1 of 4)

It is important to have a structured and thoughtful plan in mind in order to engage the community and work towards successful outcomes.

Here are some steps your organization can take to get started:

| Step | Actions |
|---|---|
| 1. Determine your focus for community engagement | What EDI area or topic are you looking to address in your organization? |
| 2. Understand the needs and purpose of the conversation | What are you hoping to learn from these conversations? How can you ensure that members of the community are brought to the table and that their voices are heard? |
| 3. Explore organizations and individuals to involve | Who are experts in this area that are willing and comfortable in speaking with you? |

(Continued on next page)

# 2.4.a How Do We Engage With Stakeholders? (2 of 4)

| Step | Actions |
|---|---|
| 4. Structure your engagement and conversation(s) | What questions are you planning on asking? Send an agenda in advance to the participants so that they are able to prepare for the discussion. |
| 5. Implement engagement activities | Which activity best fits the need of the discussion? Depending on the group and topic, you can include anonymous forums, focus groups, individual one-on-one conversations or informative workshops. |
| 6. Communicate the actions and next steps being taken | What are you going to do with what you have learned? Communicate with the stakeholders how you will use and apply your learnings to improve your organization for priority groups. |

# 2.4.a How Do We Engage With Stakeholders? (3 of 4)

**Priority Group Callout:**

Members of priority groups understand their communities and challenges the most.

- When focusing on specific priority groups, engage with individuals and/or organizations representing that group. Decisions should not be made on their behalf or based on assumptions

**Priority Group Callout:**

There are specific protocols and considerations for engaging with “Aboriginal” and/or Indigenous Elders and Knowledge Keepers. These protocols should be respected and followed.

- When considering engaging an Elder or Knowledge Keeper, first develop relationships with their community
- Establish why your organization and/or initiative is a good fit for them and communicate what process would be required for them to share their knowledge

This guide highlights working with Elders and Knowledge Keepers.

# 2.4.a How Do We Engage With Stakeholders? (4 of 4)

**Consideration(s) for Intermediate/Advanced Organizations:**

Organizations or independent consultants that focus on priority group communities often are expected to participate in community engagement activities, free of charge.

- Consider partnering with the stakeholder to receive additional services and supporting them in generating revenue
- Consider compensating participants to thank them for their time and contributions

# Sustaining the Change: Regional and Industry Considerations (1 of 2)

## Industry: Technology

The COVID-19 pandemic propelled the technology industry's focus on EDI. According to Osler, the industry has grown rapidly with the number of positions increasing by 22.5% over the last 5 years.

Technology hubs are often located in cities with a high cost of living, and it is challenging for individuals from priority groups to move to different parts of the country without their social networks and support systems.

To increase representation, organizations can put in place the following practices:

- Leverage a remote work strategy to hire from across the country, and provide employees with the ability to work from anywhere
- Where possible, open offices in cities with a lower cost of living
- Track diversity within each level to understand if goals are being met and where improvements need to be made

**Case Study**
**Small/Medium Organization: DUCA Financial Services Credit Union**

DUCA, a small credit union based in Ontario a certified B-corporation and committed to ESG. DUCA's motto is "DUgood" which focuses on supporting members, building and investing in the communities it serves, and advocating for fair and equitable banking.

DUCA helps people get access to basic financial services, addresses social challenges, and ensures fair financial inclusion.

# Sustaining the Change: Regional and Industry Considerations (2 of 2)

## Industry: Banking and Financial Services

According to Osler, in 2021, with 24% of board positions held by women, 6.8% held by Racialized, Black, and/or People of Colour, 0.5% held by Indigenous Peoples, and 0.5% held by People with disabilities, organizations in financial services can implement the following practices to increase representation within the industry:

- Put a board diversity policy in place with targets and programs to increase diversity across senior management
- Assess diversity at leadership levels to understand progress toward promoting and retaining diverse talent (e.g. TD Bank is conducting a racial-equity audit to assess diversity within the organization and if it is meeting its targets)
- Identify the levels or roles in which employees from priority groups are leaving the organization, and create programs to support their advancement
- Put development plans in place to help employees from priority groups achieve promotions and move into leadership positions
- Provide training to support employees in their roles

**Case Study**
**Large Organization: Parkland Corporation**

Parkland, a large supplier and marketer of fuel and petroleum products and convenience store operator. The Board has implemented a target representation of Black, Indigenous and People of Colour and 2SLGBTQ+ on its board and in executive officer positions of 10%, as part of its Diversity Policy.

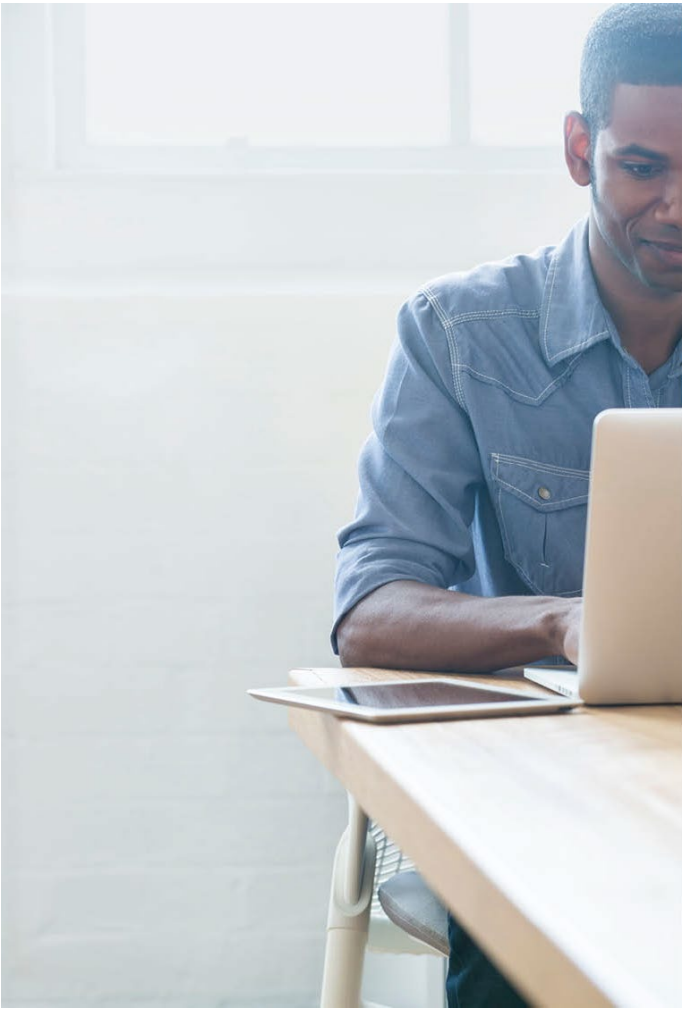
The organization will use these targets to guide its approach to recruitment and have a governance structure and leadership team that will help Parkland reach its long-term goals.

# Scenario: Checkpoint 2

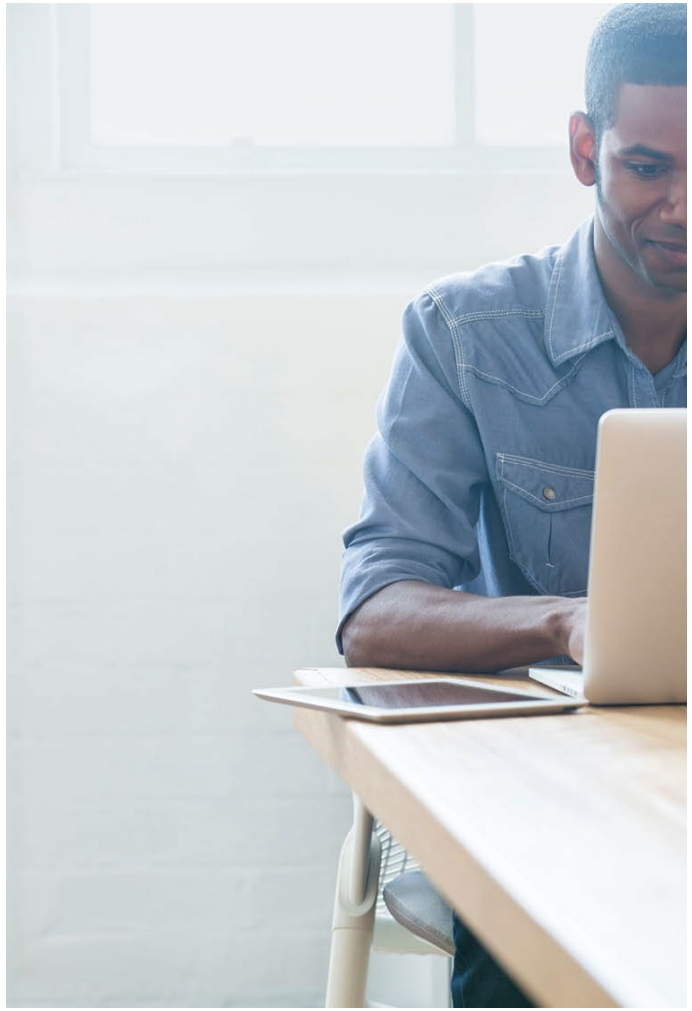
Jean is excited to have other leaders on board, and now recognizes the importance of sustaining the change they started. Jean realizes that their organization EDI strategy is currently being led solely by the Human Resources department. There is limited leadership oversight to how the EDI strategy and progress is not being tracked.

**What should Jean do? Select all that apply.**

- ❑ Collect self-identification data without communicating findings and how those findings are being used
- ❑ Ensure pieces of the strategy are owned by team members across the organization to build accountability
- ❑ Help put governance mechanisms in place to oversee the strategy
- ❑ Put the responsibility of the strategy on one person or team
- ❑ Tie metrics to initiatives to measure and track progress



# Scenario: Checkpoint 2 (Solution)



Jean is excited to have other leaders on board, and now recognizes the importance of sustaining the change they started. Jean realizes that their organization EDI strategy is currently being led solely by the Human Resources department. There is limited leadership oversight to how the EDI strategy and progress is not being tracked.

**What should Jean do? Select all that apply.**

- ❑ Incorrect: Collect self-identification data without communicating findings and how those findings are being used
- ❑ Correct: Ensure pieces of the strategy are owned by team members across the organization to build accountability
- ❑ Correct: Help put governance mechanisms in place to oversee the strategy
- ❑ Incorrect: Put the responsibility of the strategy on one person or team
- ❑ Correct: Tie metrics to initiatives to measure and track progress

# Additional Resources (1 of 2)

You can leverage additional resources to learn more about how your organization can adapt systems and structures to be more inclusive, and how to build and sustain organizational change. Consider the resources below!

- **Alberta Mentorship Program**
  - Be a Mentor
- **Canadian Council on Rehabilitation and Work**
  - E-learnings for disability inclusive practices
- **Canadian Human Rights Commission**
  - Collecting Employment Equity Information About your Employees
- **Conference Board of Canada**
  - All on Board: Research
- **First Peoples Cultural Council**
  - Working with Elders

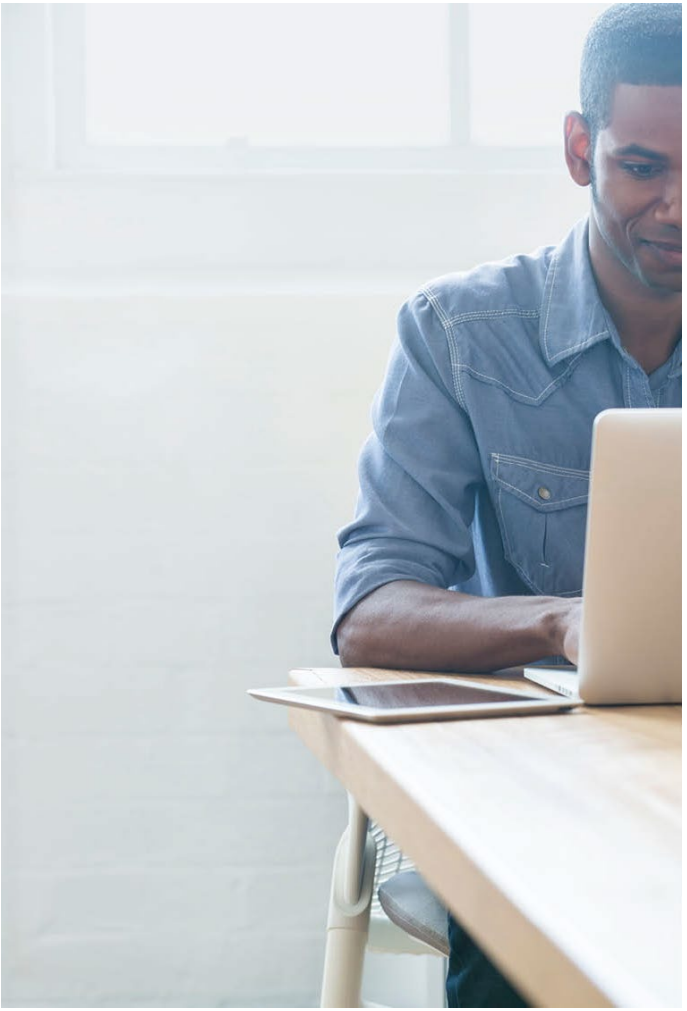
# Additional Resources (2 of 2)

- **Government of Canada**
  - Gender-based Analysis Plus (GBA+)
- **Institute for Gender and the Economy and Pride at Work Canada**
  - Transitioning Employers: A survey of policies and practices for trans inclusive workplaces
- **The Talent Consortium Inc.**
  - Unconscious Bias Learning Module
  - Psychological Safety Learning Module

# Scenario: Conclusion

Jean is excited to be involved in the organization's culture transformation and in creating an environment that is accommodating and inclusive of employees' needs.

They now understand actions they can take with other leaders in creating and sustaining the culture change within the organization over the long-term!



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# Continue your journey: Which tile is next for you?

Return to Mapping Your Journey to 50-30 Tool