

EQUITY, DIVERSITY AND INCLUSION INITIATIVES IN COMMUNITY ORGANIZATIONS

A summary of ways of supporting and strengthening capacities and skills

SUMMARY

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[Read the complete report \(French\)](#)

The community sector is particularly sensitive to discrimination, inequity, and social justice. On the one hand, community organizations are, by virtue of their mandates and daily work, on the forefront of struggles and mobilizations for equity and inclusion. On the other, the lack of resources and adequate funding disadvantages this sector relative to its public and private counterparts. Those most vulnerable to inequalities in the labour market are over-represented in this sector; in part because many organizations are involved in solidarity and care work. The community sector is, however, not immune to its share of tensions, dynamics of exclusion and relations of domination, which show up in different ways, according to location, field of work, and the period of time.

Over the past several years, movements like Black Lives Matter, #MeToo, and Idle No More reasserted the necessity of pursuing struggles for equity, diversity and inclusion (EDI) on diverse fronts. In this context, many community organizations began to scrutinize their own practices. Such initiatives are, for the most part, based on the principle that everyone concerned should be able to participate equally, with respect and dignity, in the activities of a group or organization. The goal is to fight exclusion, discrimination and marginalisation of groups and people who, for different reasons – racism, sexism, homophobia, ableism, colonialism, ageism, educational inequities, poverty, etc. - are treated unfairly by society.

“So inclusion, diversity, equity is a little bit of our existence.”

- A participant

This summary¹ outlines a research and consultation process undertaken by the SHERPA University Institute with the community sector on the request of Centraide of Greater Montreal. It provides an overview of the main findings and action points to support and strengthen EDI capacities and skills of organizations and their partners. The full report includes a detailed overview of the process, an in-depth analysis of the issues and strategies identified during the consultation, and additional tools and resources for individuals and groups who want to go further.

¹ To lighten the presentation of this summary, we have not included most of the numerous sources and references on which this project relies. However, we invite you to consult them in the final report.

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The community sector is, however, not immune to its share of tensions, dynamics of exclusion and relations of domination, which show up in different ways, according to location, field of work, and the period of time.



Photo : Aris

WORKING DEFINITIONS

“Equity, diversity and inclusion” is an expression much in use these days. It designates a broad range of initiatives, programmes, policies, and measures of all kinds which specifically aim to:

▶ fight inequalities, discrimination, and attacks on dignity in an organization; and

▶ increase the accessibility and sensitivity of the organization’s activities, services, and interventions to encompass the plurality of profiles, status, and positions of current and potential users.

Diversity: an environment in which the contribution of people of diverse backgrounds and profiles is valued

The goal of diversity is to value fully the contribution of people of diverse backgrounds and profiles within an organization. It invites us to ask why certain groups are under-represented – in particular, those experiencing or having experienced discrimination, domination, marginalisation, and exclusion – and how the situation can be remedied.

Equity: fair access to resources and to the same opportunities

An organization strives for equity when it seeks to eliminate direct, indirect, and systemic barriers to participation of all. It attempts to treat people fairly by taking into account all the different realities and backgrounds which may prevent some people and groups from accessing the same services and opportunities.

Inclusion: an environment promoting the participation of all

Inclusion aims to ensure that everyone feels welcome, respected, recognized and safe within an organization. Its goal is the participation of all and it actively supports everyone’s contributions to the activities and decisions of the organization.

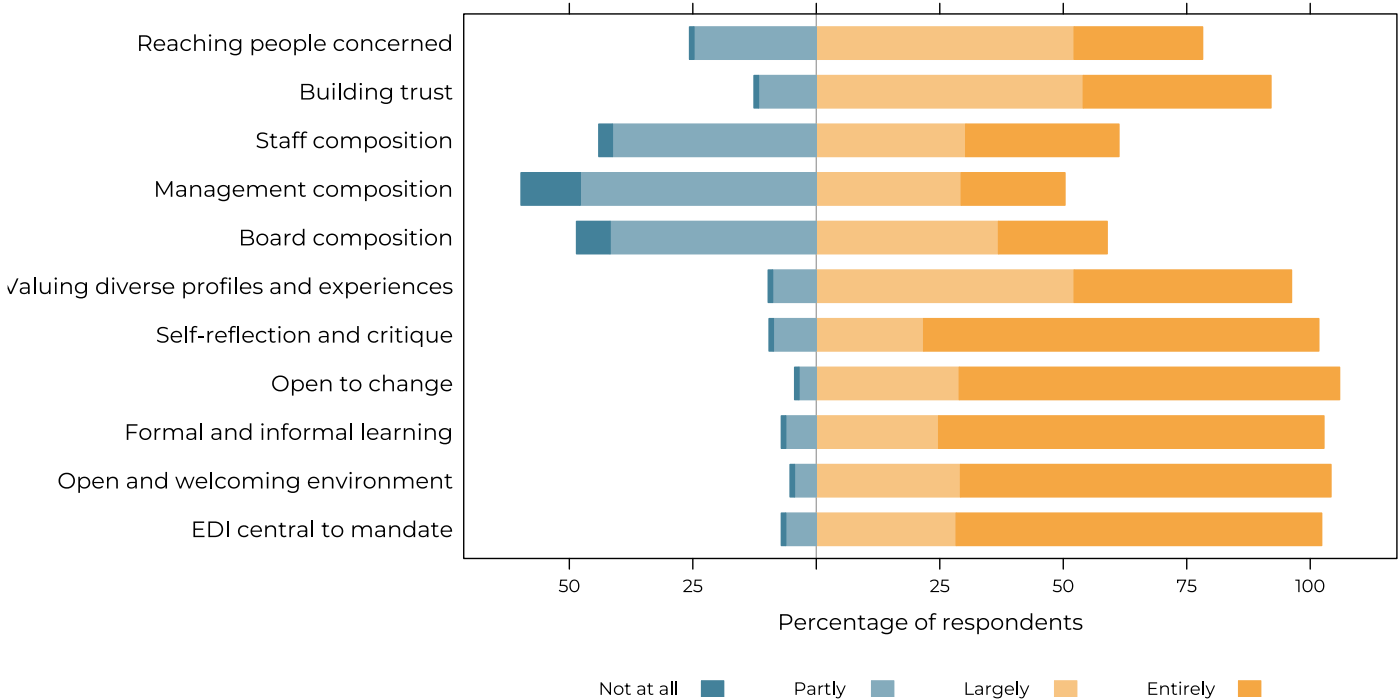
PERSPECTIVES OF COMMUNITY ORGANIZATIONS

Many organizations have frameworks, often formal and well-integrated, which help them to think about equity, diversity and inclusion in their practices. Others are in the process of seeking guidelines, especially those working in fields traditionally less used to such questioning. Overall, organizations have solid

and varied expertise on these questions – expertise which should be recognized, named, and mobilized.

When asked to rate their organization on various indicators of EDI, most participants in the consultation believed that, overall, their organization met the different standards ‘largely’ or ‘entirely’.

Perceptions within community organizations



Participants expressed most reserves about the representivity of their organization’s personnel (staff, management, board); followed by the degree to which they reached everyone concerned. A considerable number believed that their organization was poorly equipped in one or more of the areas.

The consultations also allowed a broadly-shared, basic conception of EDI to be identified. This approach mobilises a characteristic set of attitudes and vocabulary anchored in the principles of community-based action, and reflects the social and political struggles in which the groups participate.



Main significations of EDI in the groups consulted

Principles “at the heart of our mandate.”

“Of course it is part of our orientation, of our mandate from the start; even before everyone was talking about it, it was part of what we did.”

Practices of welcoming people into the group: openness, respect, compassion, kindness, non-judgemental.

“Quebec society is very multicultural, the needs of the population are diverse, so services must respond to the diverse cultural needs to be effective and achieve individual and community wellness.”

A way of fostering a feeling of belonging.

“Our vision of inclusion highlights the importance of acting so that all members of our community, regardless of the diversity they carry, can recognize themselves in it, develop a feeling of belonging, and, possibly, contribute to its transformation.”

A matter of social relevance: concretely contributing to struggles against exclusion and inequalities in the community.

“It’s a start to the changes we want to see in society, where there will no longer be any relations of oppression. Our organization must be part of the overall solution.”

ORGANIZATIONAL TRANSFORMATION AND ITS CONDITIONS

We approach EDI initiatives from the perspective of organizational transformation and the learning processes which support this transformation. Through the lens of collective and organizational development, we can classify initiatives according to their goals and fields of application while seeing them as part of an integrated process of experimentation, learning, and change.

Six Considerations for Significant and Sustainable Transformation



a) Equity, diversity and inclusion affect all aspects and activities of an organization.

Beyond the more common initiatives (training, hiring practices), concern for EDI can lead to questioning organizational culture just as much as daily activities and practices and is best approached from a global and integrated perspective.



c) EDI work is an ongoing, never-ending process.

The idea of a process helps us to focus on concrete results and the sustainable impact of initiatives rather than on implementing predetermined measures. It also encourages us to keep in mind the broader goals of the initiatives. EDI trajectories are rarely simple and linear and changes cannot be rushed.



b) Everyone connected to an organization is concerned with EDI-related transformations.

Everyone involved in an organization is responsible for critical reflection and change – in particular, those with decision-making and leadership roles - and not just those who feel concerned. This approach invites us to question power relations in the group, as well as speaking and decision-making mechanisms.



d) Difficulties and tensions are an integral part of the process.

EDI learning inevitably involves times of tension and discomfort. Learning to collectively navigate these difficulties and patches of resistance is an integral part of the collective way forward. Critiques and demands can be embraced as opportunities to move towards more inclusive practices.



e) Resources determine how far transformations can be carried out.

Planning and expectations for carrying out EDI initiatives should correspond to the human and material resources available, especially to avoid their becoming an additional burden on the people and groups responsible for implementing them.



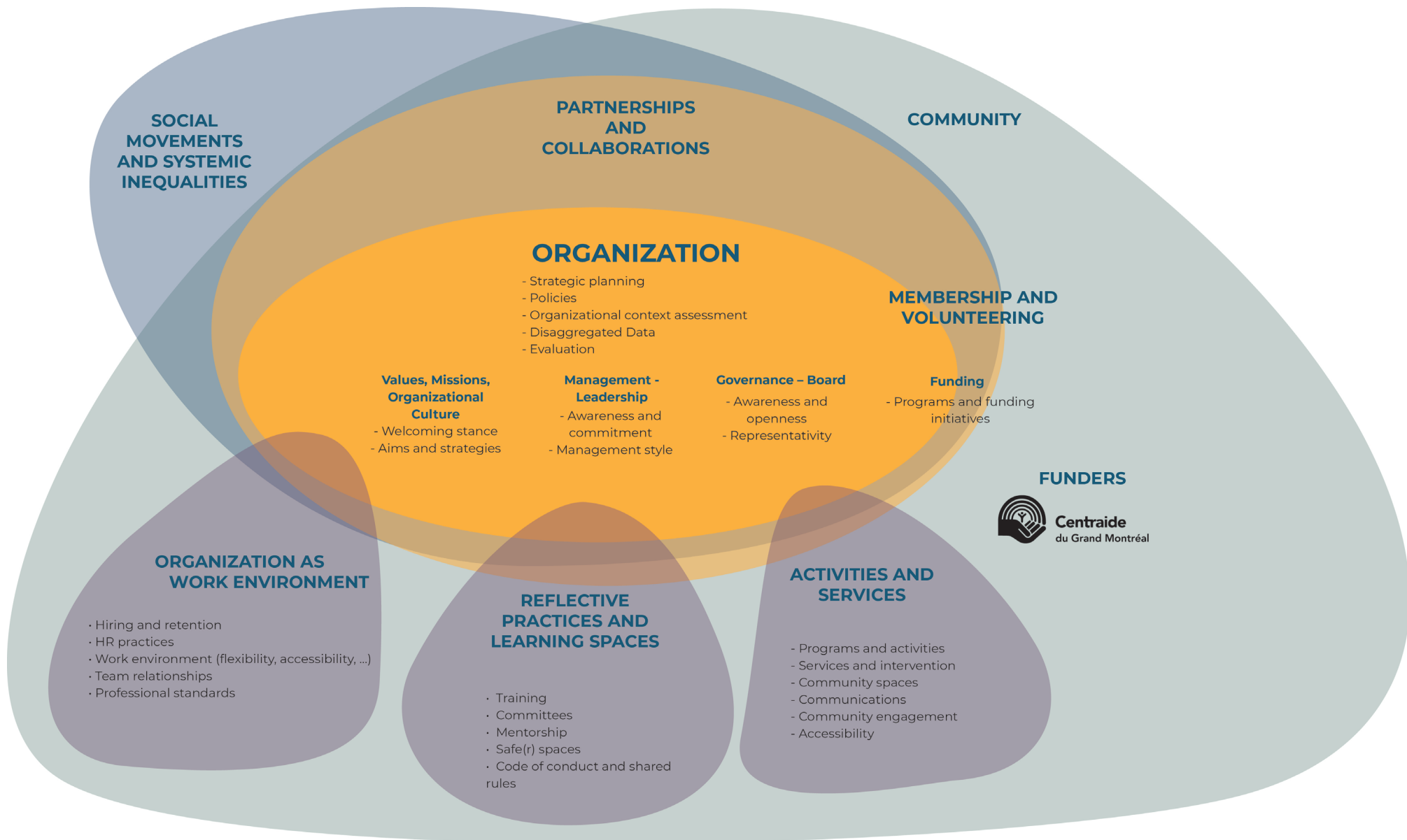
f) Methods should be adapted to capacities and needs.

There are as many ways of planning and carrying out EDI initiatives as there are organizational contexts. The most meaningful and sustainable transformations emerge from processes aligned with organizational capacity and need. Organizational change can be planned in a more formal way or be undertaken as opportunity arises and resources become available.

Multi-Level Initiatives

Initiatives promoting equity, diversity and inclusion in the workplace and living environments are made up of skills and practices situated at different, complementary levels: individual attitudes and skills; team practices; organizational practices; transformation of the environment (spaces for collaboration and consultation, contact with partners and funders, etc.) and of communities.

The following, non-exhaustive, diagram illustrates the range of organizational spheres of action potentially concerned with EDI initiatives. The organizations contributing to this project often viewed their own practices from this broad perspective, and in connection with the social and political struggles they wage at neighbourhood and community levels.



*Equity, diversity and inclusion initiatives in community organizations. An overview of spheres of activity involved
Institut universitaire SHERPA, 2024*

An Iterative Process of Self-Reflection and Learning

EDI initiatives are opportunities for collective learning and transformation. They are part of an iterative process of self-reflection which can be guided by three major transversal principles:

- ▶ **1. Draw on pre-existing strengths.**
Start with pre-existing strengths and skills so that plans for change can be rooted in familiar, tested practices.
- ▶ **2. Seek to leave one's comfort zone.**
The most fertile space for learning is generally at the edge of our comfort zone and our skills – the point at which we are stimulated by challenges without feeling completely overwhelmed.
- ▶ **3. Centre initiatives around the perspectives and experiences of those most concerned.**
The starting point and measure of EDI initiatives remains the position of the people who are excluded or marginalized in the group or community; their experiences should, at all times, be central to critical reflection and to the practices put in place.

On this basis, we provide an overview of practices and issues affecting different organizational spheres of activity. Each is approached through three lenses, corresponding to the three principles identified above:



Pre-existing strengths and skills



Challenges and issues



Resources, levers, and avenues of support or reinforcement

EDI INITIATIVES IN COMMUNITY ORGANIZATIONS

Organizational Framework and Management Practices

a) Values, Mandate and Organizational Culture



Strengths

A set of values and principles, broadly shared in the community sector, help make it fertile ground for implementing and experimenting with practices promoting equity, diversity and inclusion. For many, these define their very reason for existing.

Practices of openness and unconditional welcome have long been part of many organizations' day-to-day work. They are oriented around encounter and experimentation and open to thinking through situations where implementation may prove more difficult.

Many groups are involved, concretely and on a daily basis, in movements struggling for equality and social justice.



Challenges

From values to commitment.

Beyond principles, it is not always obvious how to move forward concretely. It requires first clarifying the meaning of the commitment (e.g. to the organization's values or mandate) and then figuring out which changes or initiatives need to be set into motion. Processes of reflection scrutinizing the organizational culture, its biases and blind spots, are generally good starting points.

*“A true willingness to help others less fortunate;
A true willingness to relinquish one's privileges;
A true willingness to begin a process of looking at one's own biases, practices;
A true willingness to include others, consider others equally;
A true willingness to do this work from the heart and not for money, to window dress, to create a façade of change.”*

- A participant



Levers

Tools for critical reflection and self-assessment can be useful for a collective evaluation of the group's culture and different aspects of its activities.

Workshops, trainings and various forms of support also represent important levers to sustain and develop.

b) Administration, Governance and Management Practices



Strengths

The administration's sensitivity to EDI appears to be determinant, because many initiatives start at this level (in about 70% of organizations consulted) and because its support, like the Board's, is essential to developing them.

On both individual and collective levels, kindness, listening, humility, openness to questioning, and the capacity to help navigate through tensions and uncertainties appear to be facilitating qualities.

Collaborative processes and well-established participatory or horizontal management practices are assets when collective work is undertaken on EDI within a team.

Inclusive leadership practices strive to transform power relations within a group in the direction of struggles for justice and equity.



Challenges

Poor representativity in administrations and boards often limits their awareness and commitment. Networks with limited diversity represent, just as with hiring, a barrier to attracting and including people from marginalized groups in the governance of certain organizations.

Developing and deepening EDI initiatives increases the already heavy work load of many management teams, who are often overwhelmed and work with limited resources.



Levers

There is a lot of expertise in co-management and participatory management (collective, feminist management, consultations, shared decision-making power, etc.), drawing on rich and varied experience.

Reflecting on difficulties in hiring and keeping employees, especially with expert partners and community members, can lead to more diversified participation in an organization's governance.

c) Funding



Strengths

Core funding provides flexibility and a timeline permitting projects with less clearly defined terms and duration, whose benefits may be revealed over the long-term.

Adequate, dedicated funding, while rare, combined with flexible and realistic expectations, allows the time and resources necessary for EDI work.

Many community organizations demonstrate a creativity and solidarity which produce numerous inspired practices despite the lack of resources.



Challenges

Limited resources can fuel competition; undermining solidarity among groups and discouraging collaboration on certain issues. This dynamic is often layered with power relations with the result that certain organizations or issues monopolize available funding, to the detriment of groups serving minoritized people.

The influence of funders on the direction or scale of projects can be more or less direct: via reporting, in the definition of objectives or results, through participation in the same consultation bodies, because of the need to maintain a good relationship in order to renew grants, etc. These more or less subtle pressures often push groups to adopt a more consensual approach and can mean that funders' priorities prevail over the community's.

There are many systemic barriers to obtaining funding which disadvantage emerging or activist groups relative to more established organizations. This results in affected individuals and groups most often ending up in the backseat of projects aimed at them.



Levers

Several avenues can be explored to develop generally more inclusive funding practices: giving affected individuals and groups a central place in the definition of goals and modalities; maintaining individual and organizational autonomy throughout the process; deliberately and directly supporting the projects of marginalized groups; etc.

Experimentation with collaborative modes of sharing funding envelopes aim to establish the conditions for a consensual, creative, and solidarity-based allocation of resources in a neighbourhood or field of action.

Tensions and conflicts between the approaches and goals of philanthropic organizations and of community groups are worth exploring and discussing, from a historical perspective and in the context of current issues and struggles.

Evaluation as Part of Learning Processes

When adapted to the organizational context and centred on the usefulness of the results for the community, an evaluation can be an essential tool for a collective learning process. Flexible and iterative processes seem not only the most appropriate for this context, but offer the best assurance that the time and resources invested in the evaluation will directly contribute to deepening collective learning and to the desired changes.

Self-assessment tools are important resources for reflecting on organizational culture and practices. They are particularly effective in sketching a portrait of the situation and guiding discussions on which initiatives to undertake.

Ideally, the evaluation process goes beyond self-assessment for its information, because of the biases and limitations of that type of tool.

The evaluation process may be coordinated by a committee and led by an external facilitator, particularly when the process requires a certain expertise or the appearance of neutrality.

See Philippe Angers-Trottier, *Projet LabOA. Rapport de recherche*, Montréal, Centre des organismes communautaires (COCO), 2018.

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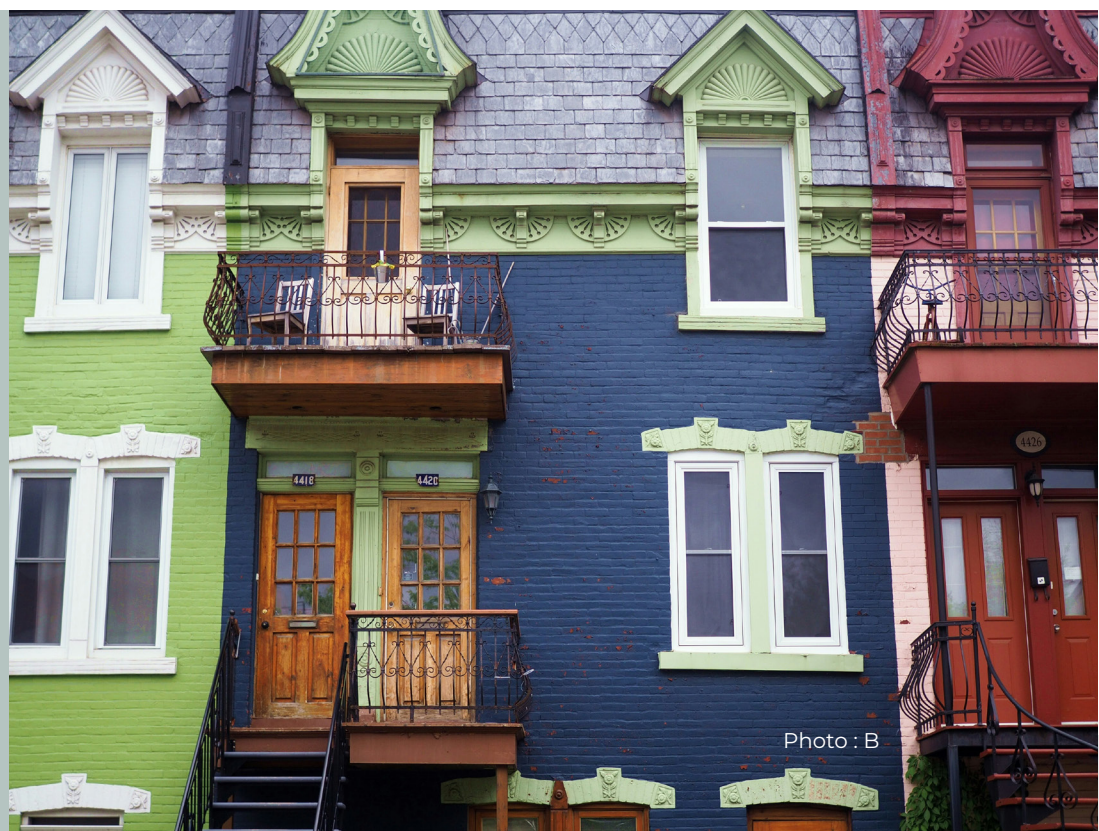


Photo : B

a) Hiring Practices



Strengths

Many organizations experiment with hiring practices open to appreciating a greater variety of profiles and professional backgrounds; for example, by redefining the essential qualifications and relevant experiences for the job.

Hiring within the community helps anchor groups in their communities and promotes representivity.

To ensure that the sociodemographic profiles of people who use the organization are reflected, some groups use targets so that certain proportions are always maintained.



Challenges

The scarcity of qualified labour makes hiring difficult in a context in which the shortage of staff is aggravated by the fact that many teams are aging. This is accentuated by the lack of recurring funding in the sector, which reduces attractiveness and ability to keep staff.

Many groups have difficulty attracting candidates outside their traditional circles and profiles – whether because of limited affinity networks, preferred ways of spreading the word, or the attractiveness of their community to certain groups and individuals.



Levers

Support for reviewing communication, distribution and hiring practices, as well as partnerships able to increase affinity networks and community sensitivity, are important resources for transforming practices in the sector.

While some overall data is available, documenting the situation by neighbourhood and sector can help direct efforts more precisely.

b) Environment and Working Conditions



Strengths

It seems that for many groups, promoting a truly plural environment – multi- or inter-cultural, plurilingual, in which people of different backgrounds and positions interact – is an important vector for learning and transformation.

Many groups deliberately experiment with different ways of increasing the flexibility and inclusivity of practices – working conditions, mutual expectations, or ways of collaborating - when integrating new people into their teams.



Challenges

Prior to integrating people with minority profiles into a group, there needs to be a commitment to making sure they can fully and completely participate. Hiring can be tokenistic if it is not accompanied by measures to address oppressive dynamics in the team.

Providing appropriate support to new people takes time and resources.

Transformations in the workplace and labour practices necessarily give rise to resistance which may be difficult to resolve.



Levers

Redefining the working conditions of the sector is a huge endeavour: flexible schedules and places of work, flexible vacation, work-family balance, workplace accessibility and comfort, reviewing evaluation criteria, lightening workloads, struggles against oppression and discrimination, etc. This effort can draw on many experiences and resources groups have produced.

Spaces for Learning and Collective Development

The many formal and informal experiences in reflective practices – co-development, communities of practice, consultations, etc. – are a significant resource for the community sector. They embody what is most promising in these approaches: collective development, by and for the people and communities concerned.



a) Training

Training appears to be especially useful when:

▶ It is part of a trajectory or clear programme of learning which responds to organizational needs;

▶ It promotes learning useful to participants;

▶ Beyond raising awareness, it contributes to concrete thinking, from the starting point of those affected, about the community's practices and their dynamics of oppression and exclusion.



b) Committees

Establishing a committee seems to be especially useful when:

▶ It exercises a clear mandate from the organization and leadership, recognised by the entire group, with the objective of ensuring the process maintains its momentum;

▶ It has the necessary conditions to carry out its mandate: training; availability of members and fair remuneration for their work; support from the administration, etc.;

▶ It ensures that people affected can participate in setting the agenda for initiatives without making them responsible for implementation.



c) Documentation of Practices

In a context in which staff turnover is often high, documenting approaches and practices can be an important tool for knowledge-transfer and sharing expertise. Given limited time and resources, passing on knowledge and practices often relies on support and direct contact in a group. Documenting practices helps:

- ▶ Sustain practices, over time and despite people leaving;
- ▶ Facilitate the integration of people joining the team;
- ▶ Collectively reflect on the principles underlying the group's approaches and practices; and
- ▶ Share experiences, learning, and expertise.



d) Safe Spaces

“Safe” or “safer spaces” are rooted in an important tradition of knowledge and practice in community and activist circles. The intention is to create space for collective learning, mobilisation, and care of self and others. Accessibility of the shared place to all is primordial, from a perspective which facilitates dialogue – both speaking and listening. The feeling of comfort which can develop in such spaces fosters sharing, introspection, critical questioning, and a certain mutual and collective accountability. Adopting a set of shared values and rules, known and accepted by all participants, can help uphold the group's commitment to ensuring each person feels safe.

“We often call our safe space a brave space, because it can never truly be a safe space. But it's a space where we try to help each other, to be able to do something together or go further together, so we try to give ourselves courage to do it collectively.”

- A participant



e) Partnerships and Collaborations



Strengths

Partnerships and collaborations can be a significant source of support to develop and strengthen more inclusive practices. They open up sometimes unexpected opportunities for learning and sharing expertise.



Challenges

Logistically, collaborations take time, energy and resources which are not always available.

Bridging differences in organizational cultures (community, institutional, municipal, private, philanthropic, etc.) can be difficult given rhythms, priorities and sometimes irreconcilable perspectives.

Deeply rooted privileges and relations of domination often surface in collaborative spaces, tending to undermine efforts by groups to fight exclusion.



Levers

Supporting innovative partnerships can contribute in different ways to implementing inclusive practices creatively.

Many strategies can be deployed to promote dialogue and inclusive practices in consultation bodies: awareness-raising activities, training, dedicated committees, modelling, consensus (rather than majority) decision-making, mediation, facilitators, etc.

Activities and Services

The importance of reaching, welcoming, and offering services adapted to the needs of everyone who could benefit from the organization's activities was a main concern raised by people throughout our process. Adapting to the changing realities of the neighbourhood, expanding the base beyond networks historically mobilized around the organization, and reaching more groups and individuals are

goals which require rethinking the way people are welcomed into the organization, its programming, its communication and mobilisation strategies, and accessibility.



Strengths

The community sector draws on a number of approaches to create welcoming and listening spaces for current and future members (anti-oppressive, anti-racist and intercultural practices; intersectional feminism; universal accessibility, etc.).

The participation of community members in planning and agenda setting is a well-established practice in many groups.

Many organizations routinely use inclusive and diversified communication practices in their work: multilingualism, translation, interpretation, etc.



Challenges

Broadening their base to better reflect the community remains a challenge for many organizations. However, representivity is an important vector of transformation in a group.

This challenge is often associated with the limited reach of the organization, which may in turn be related to issues of affinity (networks, contacts), communication (strategies, ways of spreading information, the group's image), and resources.

Accessibility often comes with a significant cost (physical lay-out of the space, interpretation and translation, availability of staff, etc.).



Levers

Developing community engagement practices can help create significant and enduring relationships with new groups based on their needs.

Partnerships and expertise shared among groups with specific experiences and knowledge (e.g., realities of immigrants, racialized people, LGBTQIA+ communities, illiterate people, disabled people, etc.) are important sources of learning and co-development.

Universal accessibility is an essential starting point for rethinking an organization's practices and day-to-day work.

Guidelines, Plans and Policies

A great majority of the people consulted were enthusiastic about the idea of collectively clarifying and articulating their EDI intentions. 65% of the organizations surveyed already had specific guidelines and 60% of the rest aimed to have them in the medium-term. Participants were nevertheless wary of funding programmes requiring organizations to adopt a formal policy; in particular because of the additional workload this would represent and the risk that this type of requirement would lead to performative commitments, disconnected from the real needs of the community.



1 Intuitive Guidelines

Without necessarily seeing the need or having the time to formalise their initiatives, many groups strive every day to make their practices and spaces more inclusive.

“There are so many groups like that who have really exemplary practices, but don’t necessarily have the capacity, time or even the interest to name or articulate it in a way that fits into a little check box in project submissions. We also have to respect that.”

- A participant

Community Sector Approaches

There are different ways of clarifying and (more or less) formally articulating an organization’s EDI intentions, depending on the group’s needs, ways of organizing, and management styles.



2 Specific Action Plans

This practice is particularly widespread in bigger organizations. It is generally based on a prior analysis of needs and benefits from being structured around the concerns of affected people throughout the process.



3 A Component of Strategic Planning

While under-documented, this is commonly practised by many of the organizations consulted. Strategic planning seems to create an opportunity to think collectively about these issues and integrate them into the group’s work as guiding principles.

Formalising commitments allows them to be integrated into the organizations' work in various ways, rather than undertaken as isolated initiatives.



Photo : Étienne Delorieux

Formalising commitments allows them to be integrated into the organizations' work in various ways, rather than undertaken as isolated initiatives. It also allows them periodically to be brought to the surface, since they can easily become secondary to the pressure of day-to-day work.

Two additional conditions are essential to ensure that adopting guidelines bring about significant changes in the group:

- ▶ recognition that it is an evolving, non-linear, uncertain process; and
- ▶ guidelines must be rooted in the realities of the communities.

ACTION POINTS



Promoting the development, adaptation, deepening and sharing of resources produced in the community sector in Quebec and elsewhere seems a promising “by” and “for” way to support organizations in their work of self-reflection and change.



Supporting networks and other coordinating bodies to transform their own practices is an opportunity to make them important levers for the development of more inclusive practices, particularly through exchange of practices and co-development.



Groups whose expertise is little recognized or undervalued as a resource can be deliberately supported to consolidate and share their knowledge and experience.



Given varying needs and resources, efforts should primarily be directed at continuous learning within organizations rather than adopting formal plans.



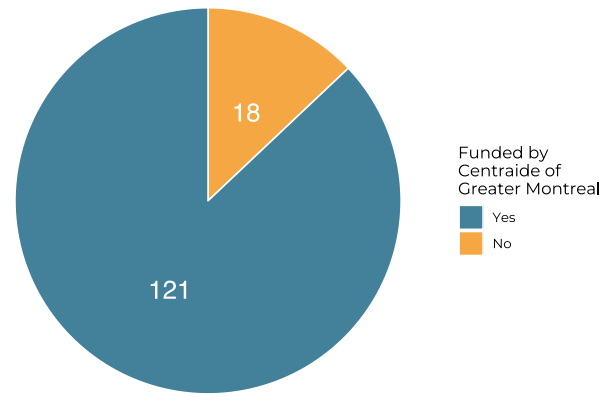
Third-party support is often appreciated at different stages when EDI-related questions are being navigated.



To offset the lack of resources, different forms of support can be developed in consultation with the target groups: dedicated funding programmes, specific funding for mandate and operations, freeing up staff, fair and targeted compensation for collaborative work or for developing new tools, etc.

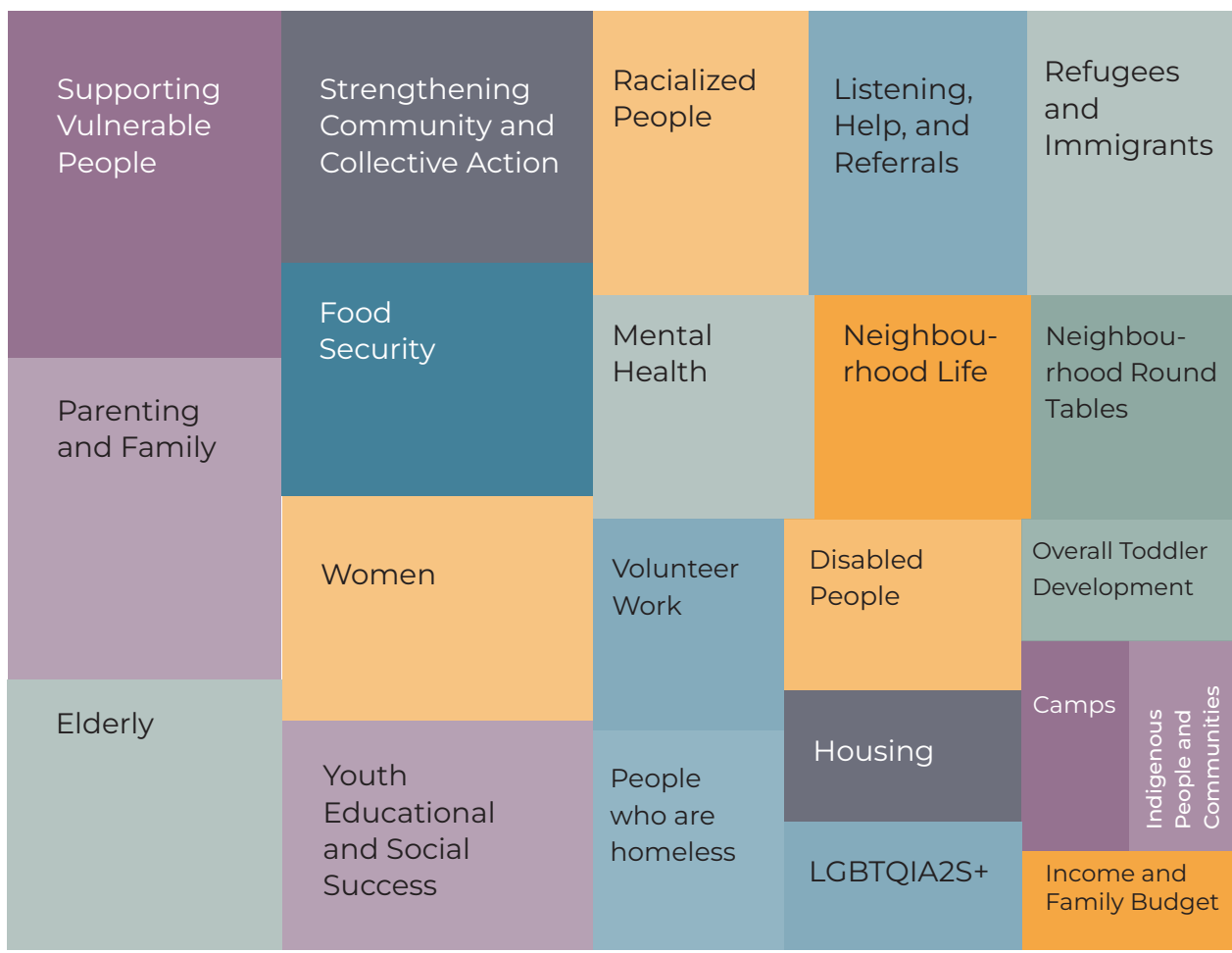
CONSULTATION ACTIVITIES AT A GLANCE

Online Survey
 October 20 to November 21, 2022
 139 respondents; 120 substantial answers



From every horizons of community action

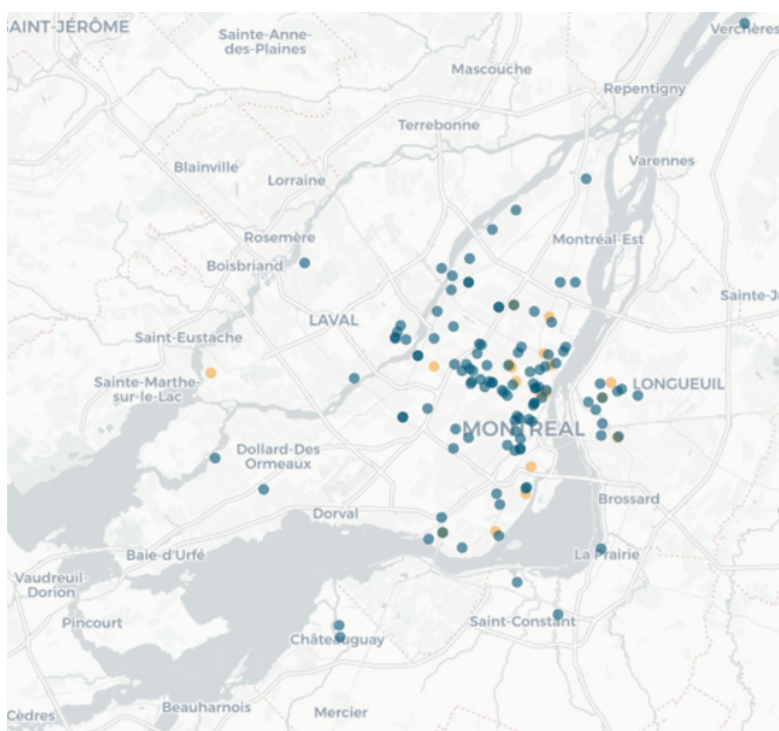
Main sectors and target populations represented in the consultation: supporting vulnerable people, strengthening community and collective action, food security, youth educational and social success; families, elderly, women and racialized people.



Main sectors and target populations represented in the consultation

From various corners of Greater Montreal

The majority of respondents (60%) hold managerial or assistant managerial positions (6%). 23% of respondents occupy various coordination or project manager positions; 6% have intervention roles and 4.5% work in human resources, administration or finance. Of those who responded to the self-identification questionnaire, the majority (87%) are between 30 and 64 years of age and self-identify as women (75%), which roughly corresponds to the proportions in the sector; particularly in management or coordination positions. The vast majority (96%) speak French. More than half are bilingual, 47% speak French and English, and more than 20% master three or more languages. In addition to Spanish and Arabic, respondents can communicate in German, Haitian Creole, Italian, Kabyle, Fula, Portuguese, Wolof and sign language. Over 18% of respondents were not born in Canada. Some 17% identified themselves as racialized, and one as Indigenous. 15.8% identified as a person with a disability.



Workshops:

Three online sessions; February and March, 2023

2 hours

12 participants

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