

Makeover: Women's Leadership Co-Creation Studio Advancing Equitable Non-profit Sector Change

Environmental Scan Report

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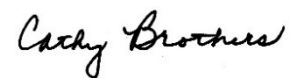
Foreword

Our initial review of governance and leadership practices across Waterloo Region's non-profit sector conducted through feminist and intersectional lenses identified structural biases in leadership recruitment practices. Further, dominant assumptions in organizational or board cultures have placed diverse women at the margins of decision-making in these organizations. Capacity Canada's vision of "*Courageous communities that excel*" and our mission of "*Bringing together the ideas, people and resources that fuel social innovation*" led us to submit our proposal to Women and Gender Equality, Canada.

The Makeover Project, which aims to identify systemic barriers, to coordinate multilevel stakeholder engagement, and co-create solutions for systems change, is also closely aligned to our new strategic directions of leading social innovation and connecting locally. Documented evidence in the literature review has revealed the values and benefits of diversity, equity, and inclusion within organizations. The purpose of this environmental scan is to understand the leadership landscape in the Waterloo Region. This report will provide a ground for our future work and will give us an opportunity to understand how to move forward.

Capacity Canada prides itself in using design thinking strategies for all our activities and services. Through the Makeover Project, we hope to create models or prototypes that could be replicated across the country for desired results. The next phase of this project includes 3 Design Sprints which will aid organizations and community members in rethinking how they approach problem solving. The goal is to develop innovative solutions to this important challenge of underrepresentation of the marginalized.

I owe profound gratitude and pride to the team that has worked so relentlessly in conducting this research and producing this report. It is a distinct privilege to present this edifying document that could chart new pathways for women's leadership in the Waterloo region and beyond.



Cathy Brothers
C.E.O.
Capacity Canada

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We are grateful for the continuous guidance and support from the project Advisory Table members -

- Jennifer Hutton, CEO, Women's Crisis Services of Waterloo Region
- Fauzia Mazhar, Founder and Executive Director, Coalition of Muslim Women
- TK Pritchard, Executive Director, SHORE Centre
- Sara Casselman, Executive Director, Sexual Assault Support Centre of Waterloo Region
- Kim Decker, CEO, YWCA of Cambridge

A crucial component of the Environmental Scan was the online survey, for which we would like to thank Sherryl Petricevic, Jen Petricevic, and Profound Impact.

We owe our gratitude to the survey and interview participants and to those who shared the survey within their networks or connected us to interviewees.

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Finally, we owe sincere thanks to Cathy Brothers for her unrelenting encouragement, leadership, and guidance.

Executive Summary

Capacity Canada launched the project -Makeover: Women's Leadership Co-Creation Studio: Advancing Equitable Non-profit Sector Change to Identify and address systemic barriers for underrepresented women, trans, and non-binary Individuals In the not-for-profit leadership. This 15-month project is funded by Women and Gender Equality Canada (WAGE).

The scan is comprised of a literature review, 18 qualitative semi-structured key Informant Interviews (from 6 board leaders, 7 senior staff and 5 community stakeholders), and a qualitative survey of not-for-profit organizations and community members to examine the current state of governance and leadership practices through a feminist lens.

Key Findings

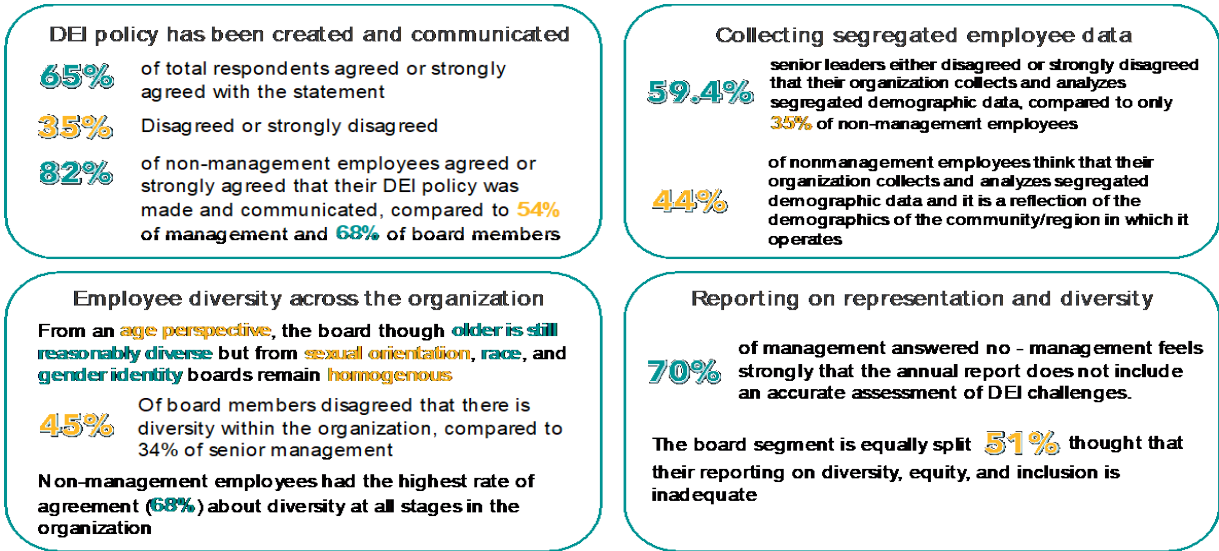
Literature Review

The literature review was conducted to critically analyze and provide a baseline assessment of gender diversity across charitable sector boards and organizations. The findings from the literature review have been organized into the following categories:

- **Existing and Emerging Barriers:** which includes lower compensation, race and gender biases, lack of leadership roles, dismissive organizational culture and impacts of covid-19 pandemic.
- **Data Collection and Knowledge Mobilization:** which includes a call for sectoral data that is more robust and comprehensive, centering the experience of women in the sector, and implementation challenges.
- **Methods to Improve Gender Equity within Boards:** which includes board diversity policies, board assessment tools, addressing turnover, disclosing of demographic data, follow-up, and framing gender diversity in organizations.

Environmental Scan Survey

The survey gathered valuable data about the current landscape of the non-profit sector in the region with regards to their diversity, equity, and inclusion strategies. These are the key findings from the survey:



Key Informant Interviews

The individuals selected for interviews were connected to organizations in Waterloo Region with a commitment to addressing diversity, equity, and inclusion (DEI). Of the **18** interviewees, **6** identified as BIPOC and **2** as 2SLGBTQ+.

	Recurring Themes	Perceived Barriers Towards Greater DEI
Senior Leaders	<ul style="list-style-type: none"> • High level of responsibility & accountability to make change • Process of improving DEI is complex and continuous • Negative attitudes towards DEI • Challenge of moving from understanding to action • Previous experiences of tokenism 	<ul style="list-style-type: none"> • Visualization • Confidence • Gender Discrimination
Board Members	<ul style="list-style-type: none"> • Diversifying board makeup through succession planning • Importance of dedicated resources for DEI • Need for increased knowledge and education • Including youth on boards 	<ul style="list-style-type: none"> • Current board makeup • Unpaid time commitment
Stakeholders (community members, frontline staff)	<ul style="list-style-type: none"> • Value of working on boards • Representation on boards • Leadership journey • Factors for choosing boards 	<ul style="list-style-type: none"> • Fear and experience of discrimination • Focus on survival jobs for immigrants • Time and availability • Strict requirements

Next Steps

Since September 2022, the project has started gathering a group of dedicated change-makers and equity seekers to take the first step towards building strategic solutions to accelerate changes that will amplify women's voices within the non-profit sector. We will be using the tools of human-centred design to gain direct insights into what women from underrepresented communities need in order to further their opportunities for leadership.

The design studio will be facilitated by members of [Capacity by Design](#), a program of Capacity Canada that helps social good organizations rethink how they approach problem solving in order to develop innovative solutions to complex challenges.

Introduction

Project Aims

Capacity Canada launched the project – Makeover: Women’s Leadership Co-Creation Studio: Advancing Equitable Nonprofit Sector Change. This 15-month project, funded by Women and Gender Equality Canada (WAGE), supports a feminist response and recovery from the current impacts of COVID-19 through systemic change.

Project Outcomes

At the end of this project, Capacity Canada will have contributed to addressing systemic barriers by advancing inclusive policies and practices, encouraging more equitable and effective sharing of resources, increasing networks and collaboration to accelerate systemic change, supporting positive distribution of authority, voices, and decision-making power, and finally addressing persistent harmful gender norms and attitudes to support women’s equality.

Project Activities

Following an environmental scan, Capacity Canada will use a design-thinking strategy to identify specific local barriers limiting women from stepping into non-profit leadership roles. The insights gathered from this phase will help to inform the focus and direction of subsequent design sprint sessions where a group of stakeholders will engage in an iterative, collaborative process that incorporates the principles and practices of human-centred design.

The project is also undertaking three community surveys in collaboration with its project partner Profound Impact. The surveys collect sectoral data from the perspective of multiple stakeholder groups in Waterloo Region. The first collected a broad baseline of the perceptions and practices of nonprofit and charitable organizations as it relates to diversity, equity and inclusion. Based on the learnings from the first survey, the second survey will focus in greater depth on DEI and gender diversity work of boards of directors in the region. The third and final survey of the project will be conducted to address any gaps in knowledge, as determined by cumulative findings of the previous surveys and project work to date.

Rationale and Context

The nonprofit sector is a women-majority field, but not always women-led. In 2018, a literature review completed by the Ontario Nonprofit Network (ONN) identified that **75%-80%** of the Ontario nonprofit sector workforce is women, yet this employment

share is not representative of what is being observed at the leadership level – women are underrepresented in senior leadership positions and men are overrepresentedⁱ. Within the Waterloo Region, however, women are still under-represented in the labour market: **74%** of men in the Waterloo Region are actively involved in the workforce, while only **66%** of women (above the age of 15) are doing soⁱⁱ. This report also noted several other factors particularly important for women in the workforce in the Waterloo Region: family responsibility plays a big role in the proportion of women able to enter the labour market; the Kitchener-Waterloo Region has made significant steps in closing the income gap; key areas within the region? are high risk for poverty relative to benchmarks; and Waterloo Region is over-represented in sexual assault allegations along with it being a gendered crime (i.e., in 2018, males represented **98%** of all charges for sexual assault)². This data was collected before the pandemic, and researchers suggest that these trends were only exacerbated by the COVID-19 pandemic.

Objectives of Environmental Scan

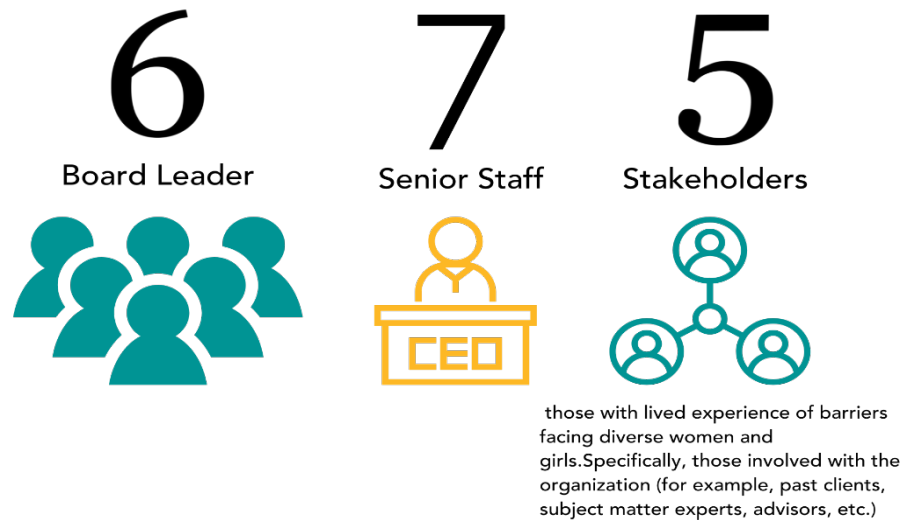
This environmental scan intends to develop a baseline assessment of gender diversity across a sample of charitable sector boards and organizations in the Waterloo Region. In particular, the scan is assessing and examining gender-based leadership practices in a small sample of gender-serving charities in Waterloo Region. The sample for the environmental scan will focus on gender-serving charities and nonprofits for several reasons. Foremost among them is that these organizations will have a greater interest in exploring how their leadership and governance styles inform service delivery and how more reflective and equity-informed models of governance and leadership might inform service delivery models. Further, some gender-serving organizations have identified a strong desire to develop and model feminist governance practices across their organizations and by understanding the current state of governance and leadership practices within these organizations, more concrete insights and recommendations can be made as to how to improve or strengthen governance and leadership practices overall.

As such, the scan will focus on organizations that meet the following criteria:

- Are a charity or nonprofit within Waterloo Region and;
- Demonstrate a commitment to addressing diversity, equity, and inclusion (DEI) issues in their mission or vision or in specific programs offered.

The scan is comprised of the following methods:

- Literature Review
- **18** qualitative semi-structured key informant interviews of the following:



- A qualitative survey of not-for-profit organizations and community members to examine the current state of governance and leadership practices through a feminist lens.

A literature review was conducted to gather an overall assessment of the equity benchmarking tools, existing/emerging barriers for women, and resources/methods currently available to organizations for increasing gender diversity. Following the literature review, **18** semi-structured interviews were conducted with non-profit organizations. The qualitative assessment gathered knowledge, understanding and awareness of organizational cultural practices related to gender, equity and inclusion across boards and organizations and within the broader charitable sector. It also explored the impacts of gender exclusion across boards and in senior leadership roles.

Literature Review

The purpose of the literature review was to critically analyze and provide a baseline assessment of gender diversity across charitable sector boards and organizations. The theoretical literature and data on the role of women in the non-profit sector was and has been largely neglected. However, in 2009, Nuno Themudo from the University of Pittsburgh conducted one of the first cross-national correlation studies of

the data to examine the relationship between women’s empowerment, voluntary action, and the non-profit sector. Themudo found that there is a strong positive relationship between all three variables, suggesting the need for a gender theory that offers new insights into the non-profit sector. Additionally, this piece highlights the fact that if policy makers intensify their efforts to promote women’s empowerment, that it would not only increase equity, but may strengthen the non-profit sector as a whole (Themudo, 2009). Like Themudo’s study, others have since produced similar findings: Buse et al. concluded that board governance practices are directly influenced by the gender and racial diversity of the board; Wicker et al. determined that board gender diversity significantly reduces human resource and financial problems; and Kramer & Adams found that female directors have substantial impact on boards and make significant decisions while offering contributions related to their expertise that others may not be able to offer.

Key Findings

- Existing and Emerging Barriers
 - Lower compensation
 - Race and gender biases
 - Lack of leadership roles
 - Unconducive organizational culture
 - Impacts of COVID-19 pandemic
- Data Collection and Knowledge Mobilization
 - A Call for Sectoral Data That is More Robust and Comprehensive
 - Centering the Experience of Women in the Sector
 - Implementation Challenges
- Methods to Improve Gender Equity within Boards
 - Board Diversity Policies
 - Board Assessment Tools
 - Addressing Turnover
 - Disclosing of Demographic Data
 - Follow-up
 - Framing Gender Diversity in Organizations

Detailed Findings

Existing and Emerging Barriers

Lower compensation

Non-profit sector wages have always been lower compared to other sectors. In the Decent Work for Women literature review completed by the ONN, it was determined that women in the non-profit sector have lower compensation packages, compared to men in the sector, consisting of a “care penalty” for altruistic work as well as limited access to a pension plan and maternity top-ups. The prevailing gender wage gap is

influenced by factors including type of occupation and industry, education level, and disruptions to continuous work. Systemic gender bias and discrimination against women are also cited as maintaining causes for inequities in compensation. (Uppal, 2018). This should not be taken lightly, in fact, in a research article published earlier this year, Lee & Lee determined that the root cause for this gender pay gaps within non-profits and particularly non-profit CEOs stems from gender disparity in executive hiring and underrepresentation of women CEOs in more resourceful organizations (Lee & Lee, 2021). They conclude that a step towards improving the gender equity in hiring can be one way to help narrow this pay disparity between male and female CEOs (Lee & Lee, 2021). Although many non-profit boards do not pay their board members, the lower compensation inhibiting women from reaching those top leadership positions could play a role in restricting women's access to board opportunities (AAUW, 2018).

Race and Gender biases

Racial and gender biases have created barriers to advancement for women of colour. Women of colour have shared their experiences of being passed over for jobs and promotions in favour of other candidates – such as, men of colour, white women, or white men – with similar or even lower qualifications (Building Movement Project, 2019). Furthermore, in an intersectional study done from the same organization, race was identified as being the primary barrier for career advancement of LGBTQ people of colour (Building Movement Project, 2017).

Lack of leadership roles

In the Spring of 2021, Statistics Canada released results of a survey exploring the diversity of charity and non-profit boards in Canada. Of the total survey respondents,



were women

63%

responded as board members of locally serving non-profits and charities with a smaller percentage serving on the boards of national organizations (37%).

The main subsectors that reported greater than **50%** representation of women on boards were social services (**67%**); the environment (**64%**); education (**63%**); or law, advocacy, and politics (**60%**). The subsectors where women fell below that mark were organizations engaged in sports and recreation (**49%**) or region (**40%**).

Although this seems like a promising shift towards greater equity, other data reveals two important points: women are consistently underrepresented at the senior leadership level within certain types of non-profit organizations and women who identify as immigrants, persons of colour, LGBTQ2+ individuals, persons with a disability, in addition to First Nations, Metis, and Inuit are vastly underrepresented in senior leadership positions and non-profit and charity boards of directors (Statistics Canada 2021; Uppal, 2018). What this describes is not a “traditional” glass ceiling, where leadership positions for women are non-existent but rather that women, particularly diverse women, have limited access to senior leadership positions in large organizations based on size and revenue. (Uppal, 2018; BoardSource, 2021).

Unconducive Organizational Culture

The perpetual social landscapes that have developed within nonprofit organizations have created an environment that undermines the leadership of women, but particularly women of colour (Building Movement Project, 2018). For example, women experience more microaggressions compared to men, feel unsafe speaking out against biases and perceived discrimination, and report facing retaliation when they do not speak up (McKinsey & Company, 2021). In fact, this environment is also reflected in board composition. For example, organizations with female CEOs tend to have larger numbers of female board directors compared to male-led companies, suggesting that it still may be harder for women to penetrate male-dominant environments (Price, 2018).

Impacts of COVID-19

The impacts of COVID-19 have further exacerbated the barriers for women in the workforce. As the pandemic disrupted organizations and employees across the board, some repercussions were felt especially by women. Women reported concerns about the repercussions of requesting or taking advantage of workplace flexibility, despite benefitting from options such as remote work; during the COVID-19 pandemic women stepped up as leaders and have provided more support to their colleagues compared to men; many women reported feeling responsible for promoting DEI at work, and over the 2020-2021 years spent discretionary time on it; and a higher proportion of employees, especially women senior leaders and managers, considered leaving the workforce or downshifting their career (McKinsey & Company, 2021).

Data Collection & Knowledge Mobilization

A Call for Sectoral Data That is More Robust and Comprehensive

Collecting data within the non-profit sector is no easy task. Some refer to the sector’s ongoing “data deficit”, where it is the only major sector within Canada’s economy that is just expected to collect its own data (Barr, 2021). The historical lack of government

data on many facets of the non-profit sector, but specifically gender and DEI components, makes analysis of trends in this area particularly challenging. Although the most recent study released by Statistics Canada is a good start, Cathy Barr, VP of Research and Strategic Partnerships at Imagine Canada, shares that it is not the time to back off data lobbying efforts towards the government, but time to step them up (Barr, 2021).

Centering the Experience of Women in the Sector

At the time of the ONN Decent Work for Women Literature Review, the only intersection between gender equity and the non-profit sector was focused on clients and communities being served rather than non-profit workers and organizational systems. For example, the sector would be considered an ally and strong advocate for women's issues and delivering critical services to women. However, there is little literature available examining women's experiences working within the non-profit sector and what data there is available is either outdated, small-scale, specific to geographical regions or non-comparable data (Uppal, 2018). In a recent BoardSource report, only **15%** of chief executives and **20%** of board chairs indicated their commitment to incorporating diversity, inclusion, and equity as a lens in the organization's policies and operations (BoardSource, 2021). For gender equity to be established across non-profits and charities, policies need to be implemented and the voices and experiences of women need to be heard and considered (AAUW, 2018).

Implementation Challenges

Actions speak louder than words - a saying many are familiar with, and one that resonates with what is happening with women and leadership in the nonprofit and charitable sector. Over the most recent decade, there has been a significant number of resources dedicated to providing organizations with tools to support workforce and board diversity, but what has come of this? Inaction could be due in part to the lack of data surrounding the sector, and the challenge of tracking changes within board composition and employment statistics. However, the narratives surrounding this topic and the data that *is* available suggests there is still much that can be accomplished. (BoardSource, 2017). A recent study by BoardSource illustrates this point. While many chief executives and board chairs indicated *a commitment* to being inclusive in board leadership opportunities (**34.3%** of chief executives; **48.1%** of board chairs), their rate of implementing board recruitment practices with diversity as a goal (**18.3%**; **23.3%**) and their stated commitment to addressing organization gaps based on demographic characteristics (**15.0%**; **20.3%**), were much lower. There seems to be a disconnect between discussion to action - what is inhibiting the implementation of gender equity within the nonprofit sector?

Methods to Improve Gender Equity within Boards

Board Diversity Policies

Board diversity policies are one-way organizations can take a step towards ensuring the board is comprised of members different genders, races, ages, ethnicities, and cultures with each individual bringing their own set of unique perspectives and experiences. (Eisenstein, 2020). Policy development tools can help an organization create a diversity policy that is adapted to their specific mission, vision, values and context. In the survey of the Canadian nonprofit sector released by Statistics Canada, participants were asked if their organization had a written policy on the diversity of its board of directors. Of the total respondents,

30% indicated their organization did have a board diversity policy

47% said their organization did not

23% did not know (Statistics Canada, 2021).

Board Assessment Tools

In Professor Cathryn Edelstein's piece, *Non-profit Board Membership and the Gender Gap*, she highlights the importance of board assessment as a way boards can thwart a stagnant and exclusive cycle of board membership. To begin, boards would need to identify their composition goals and what tools they will use to assess needs while diversifying their board membership (Edelstein, 2020). Initiating these conversations around closing the gender gap and using toolkits, like the [McKinsey's Board Assessment Tool](#), are ways in which Edelstein believes the non-profit sector can move towards achieving the fifth United Nations Sustainable Development goal - "Ensure women's full and effective participation and equal opportunities for leadership at all levels of decision making in political, economic and public life" (Edelstein, 2020; UN, 2015).

Addressing Turnover

An aspect of the boards of non-profits and charities that distinguishes them from their for-profit or corporate counterparts is the level of burnout and turnover of key members and leaders (Schnapp, 2021). How can non-profits use this as an opportunity to increase gender equity and board diversity? Adam Wire from OnBoard writes that a solid board succession plan helps a board recruit more effectively (Wire, 2022). However, in a recent report published by BoardSource, it was determined that only **12.5%** of non-profit boards have a written policy for board leadership and succession planning (BoardSource, 2021). The benefits of succession planning speak for themselves - ensures smooth leadership transitions, plans for future leadership needs, builds the board's diversity profile, continuously assesses board performance, identifies and addresses gaps in board expertise, and assures new board members are aligned with organizational needs and strategic objectives (Wire, 2021). Implementing an effective succession plan could be one tool to increase gender diversity in some non-profit organizations. There are many resources to choose from including OnBoard's [eight fundamental steps for establishing effective board succession plans](#) that can be used by organizations to facilitate this process.

Disclosing of Demographic Data

In 2019, Taylor et al. completed a study looking at DEI and salience of publicly disclosing demographic data in American Environmental Non-profits. The study concluded that only **3.7%** had made their diversity data public. Among others, some key findings included: the larger the staff and higher the revenue, the more likely the organization was to divulge its diversity data; female CEOs were more likely to reveal diversity data than were male CEOs; and environmental organizations with ethnic/racial minority CEOs were also more likely to disclose demographic data than organizations with white CEOs (Taylor et al., 2019). The disclosing of demographic data could play a role in organizational accountability and prompt action toward attaining gender diversity within leadership positions.

Follow-up

The notion of follow-up cannot be negated when attempting to implement gender equity and board diversity programs amongst organizations. The follow-up process ensures that action is being taken, rather than just talked about, or planned. Including a follow-up regime also helps organizations accomplish tasks quickly and creates momentum for future work (YW Boston, 2020).

Framing Gender Diversity in Organizations

As suggested from the above discussion, we find ourselves in a place where the call for greater systemic change within society and its organizations has never been louder. With the rise in social justice movements over the past two years, the cry for bold actions has taken the narrative. People are expecting more than superficial or

unauthentic intentions of change from their leaders. As such, a great deal of time and resources have been put into identifying existing and emerging barriers to achieving DEI and benchmarks that can be used to gauge existing DEI levels within organizations. A benchmark is an organizational standard of performance that is definable by levels of achievement. We believe benchmarks can be used as a tool in framing our study and the information we wish to gather to develop actionable mechanisms for change. [The Global Diversity, Equity & Inclusion Benchmarks \(GDEIB\)](#) is a comprehensive model that has 275 benchmarks in 15 categories and four groups in five levels where the benchmarks at Level 5 are considered the best practice. It can be used as a tool to co-create the desired state of DEI in an organization, to assess the current state of DEI within an organization, to engage management and staff in DEI, to determine short-term and long-term goals, to measure progress, and to assist in hiring DEI staff and consultants.

GDEIB Model

Foundation: Drive the Strategy

Placed at the bottom of this framework to signify the need for building a strong DEI initiative.

- **Vision:** development of a strong rationale for DEI vision, mission, and strategy and align it to organizational goals.
- **Leadership:** hold leaders accountable for implementing the organization's DEI vision, setting goals, achieving results, and being role models.
- **Structure:** provide visible, dedicated support and structure with authority and budget to effectively implement DEI.

Internal: Attract & Retain People

The internal dimension focuses on strengthening policies, systems, and processes to advance DEI.

- **Recruitment:** ensure that attraction, sourcing, and recruitment is done through the lens of DEI.



THE FIVE LEVELS

For each category, the benchmarks are divided into five levels that indicate progress toward the best practices in that category:

LEVEL 5: BEST PRACTICE

Demonstrating current global best practices in DEI; exemplary.

LEVEL 4: PROGRESSIVE

Implementing DEI systemically and showing improved results and outcomes beyond what is required or expected.

LEVEL 3: PROACTIVE

A clear awareness of the value of DEI; starting to implement DEI systemically. This is what is required and expected of all organizations.

LEVEL 2: REACTIVE

A compliance-only mindset; actions are taken primarily to comply with relevant laws and social pressures. Doing the bare minimum.

LEVEL 1: INACTIVE

No DEI work has begun; diversity, equity, and inclusion are not part of organizational goals.

- **Advancement:** ensure that DEI is integrated into professional development, performance management, advancement, and retention.
- **Compensation:** ensure that job design and classification are evaluated for bias and that compensation is equitable across key dimensions of diversity.
- **Benefits and flexibility:** achieve work-life integration, flexibility, and equitable benefits - flexible work options to be widely available and accessible.

Bridging: Align & Connect

The bridging dimension provides critical linkages that bridge the foundational work with the internal and external focus of DEI in the organizations.

- **Assessment:** ensure that all assessments, measurement, and research guide DEI decisions.
- **Communications:** make communication clear, simple to understand and a crucial force in achieving the organization's DEI goals.
- **Learning:** educate all to achieve the level for DEI competence and confidence needed to create a diverse, equitable, and inclusive organization.
- **Sustainability:** connect the organization's DEI and sustainability initiatives to increase effectiveness of both.

External: Listen to & Serve Society

This dimension pertains to how the organization offers its services and products to and interacts with its customers, clients, communities, and other stakeholders.

- **Community:** be proactive in working with community, public and private partnerships, government, society at large, and through philanthropy.
- **Services & Products:** embedded DEI in services and products development to serve diverse customers and clients.
- **Marketing:** integrate DEI into marketing and customer service.
- **Responsible Sourcing:** practice responsible and ethical sourcing. Develop and nurture underrepresented suppliers.

Much of what was determined in the literature review as existing and emerging barriers for women in leadership was determined to be factors identified by the GDEIB benchmarks. This model, along with the initial findings from the literature review were used in conjunction of one another to formulate and position the interviews and survey. For example, the GDEIB suggested that if an organization wants to attract, retain, or promote women, it will need to have a strategy (Category 1: Vision, Strategy, and Business Impact), hold leaders accountable for goals to achieve the strategy (Category 2: Leadership and Accountability), develop women in the organization and leaders to support them and their advancement (Categories 5: Advancement and Retention and Category 10: DEI Learning and Development), ensure that compensation is competitive (Category 6: Job Design, Classification, and Compensation) and that benefits are such that women will join and stay with the organization (Category 7: Work-Life Integration, Flexibility, and Benefits).

Environmental Scan Survey

A comprehensive online survey was developed according to the Foundation, Bridging, and Internal pillars of the GDEIB Model. The survey gathered valuable data about the current landscape of the non-profit sector in the region with regards to their diversity, equity, and inclusion strategies. To ensure privacy, impartiality, and data security, the survey was facilitated and conducted by a third party, Profound Impact. Survey was distributed through Capacity Canada's digital channels and other networks.

Key Findings

DEI policy has been created and communicated:

65% of total respondents agreed or strongly agreed with the statement

35% Disagreed or strongly disagreed

82% of non-management employees agreed or strongly agreed that their DEI policy was made and communicated, compared to 54% of management and 68% of board members

Employee diversity across the organization:

- From an **age perspective**, the board though **older is still reasonably diverse** but from **sexual orientation**, **race**, and **gender identity** boards remain **homogenous**

45%

Of board members disagreed that there is diversity within the organization, compared to 34% of senior management

- Non-management employees had the highest rate of agreement (**68%**) about diversity at all stages in the organization

Collecting segregated employee data:

59.4%

senior leaders either disagreed or strongly disagreed that their organization collects and analyzes segregated demographic data, compared to only **35%** of non-management employees

44%

of nonmanagement employees think that their organization collects and analyzes segregated demographic data and its reflection of the demographics of the community/region in which it operates

Reporting on representation and diversity:

70%

of management answered no - management feels strongly that the annual report does not include an accurate assessment of DEI challenges.

The board segment is equally split **51%** thought that their reporting on diversity, equity, and inclusion is inadequate

Detailed Findings from Survey

The survey was conducted among 4 categories of stakeholders: board members of nonprofits, management employees (senior leaders, directors, managers), non-management employees, and community members from underrepresented groups. The 160 responses received have been analyzed and presented in this section.

Role	Board	Management	Non-management	Community
Board	45			
Management		64		
Non-management			34	
Community				17
Total			160	

Table 1: Survey respondents in each category of stakeholders

Respondent Profile

Demographic Profile of Respondents

Board Members & Management Employees are among the oldest age group.



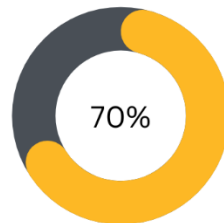
36% of Management employees 34.1% of Board Members



Gen x Baby Boomers

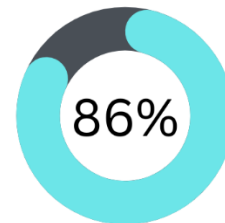
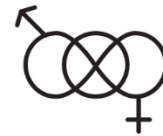
Are between 55-64 years old

Community Members are the most diverse group



of survey repondents from other groups were identified as white.

Overall Sexual orientation of survey respondents was heterosexual



of survey respondents identified as cisgender female

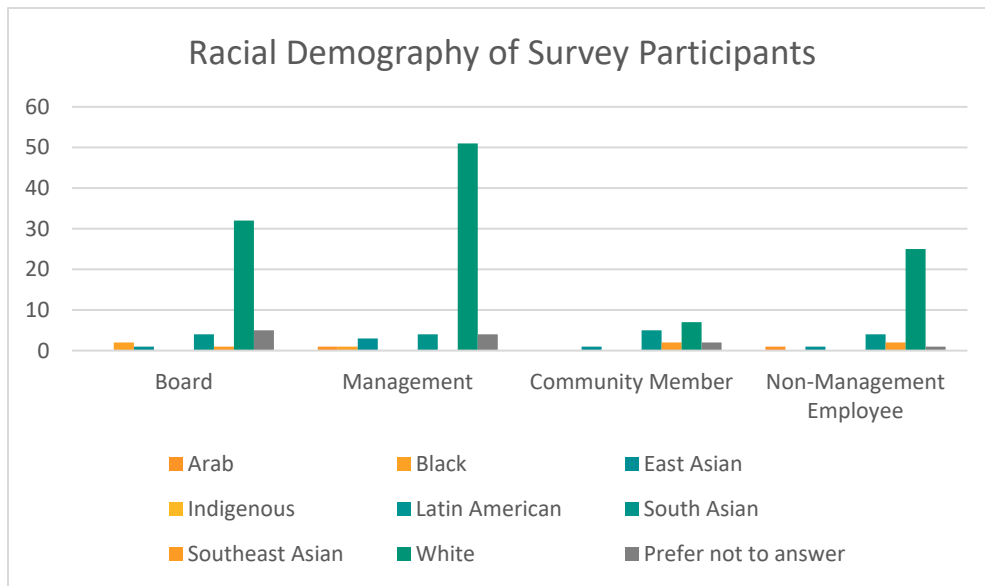
Age:

The board members and management employees are among the oldest age group. The non-management employees are overall the youngest, with community members having the most diverse representation of age groups.

Age Range	Board	Management	Non-management	Community
18-24	0%	0%	0%	7.7%
25-34	9.1%	6%	52.6%	15.4%
35-44	18.2%	16%	21.1%	23.1%
45-54	11.4%	28%	10.5%	30.8%
55-64	34.1%	36%	10.5%	15.4%
65+	25%	12%	5.3%	7.7%

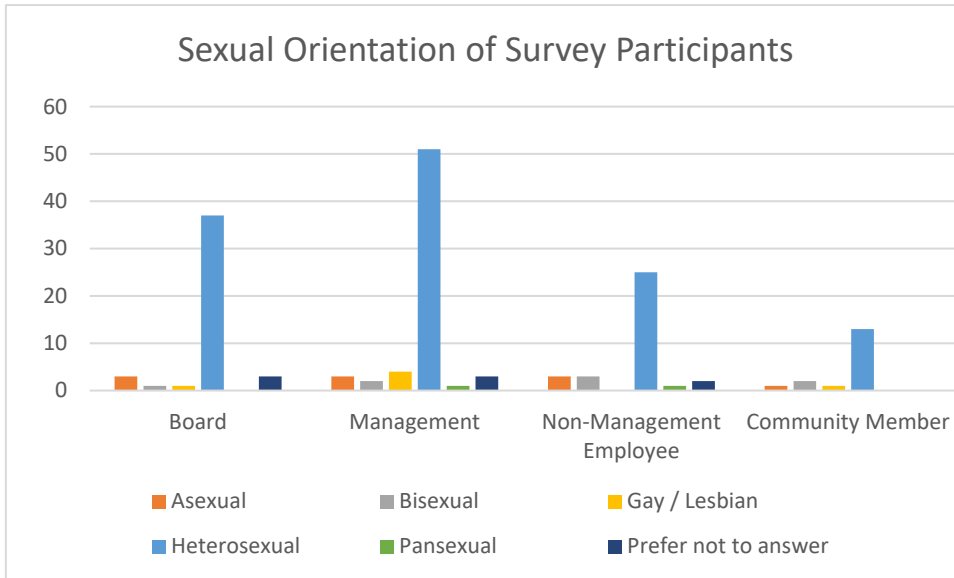
Race:

Community members are the most diverse group while all other groups are more than 70% White. The second highest most represented group is South Asian (eg. Bangladeshi, Indian, Pakistani). According to the [Region of Waterloo](#) census, 1 in 5 people in the region of Waterloo are a visible minority. Thus, the survey quite closely reflects the population of the region.



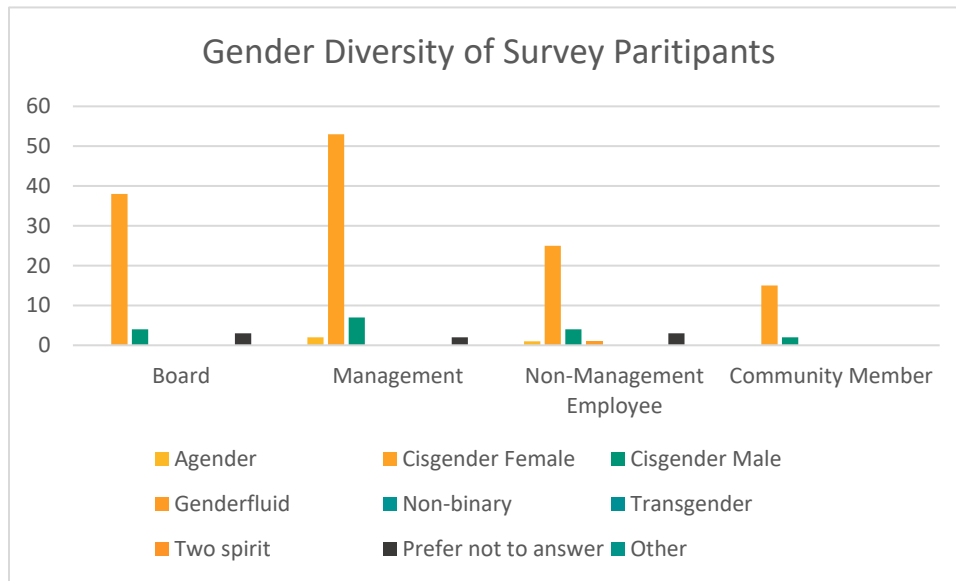
Sexual Orientation:

The most diverse group is non-management employees, but overall sexual orientation is dominantly heterosexual at more than 70% in each role. The second highest group identifies as asexual



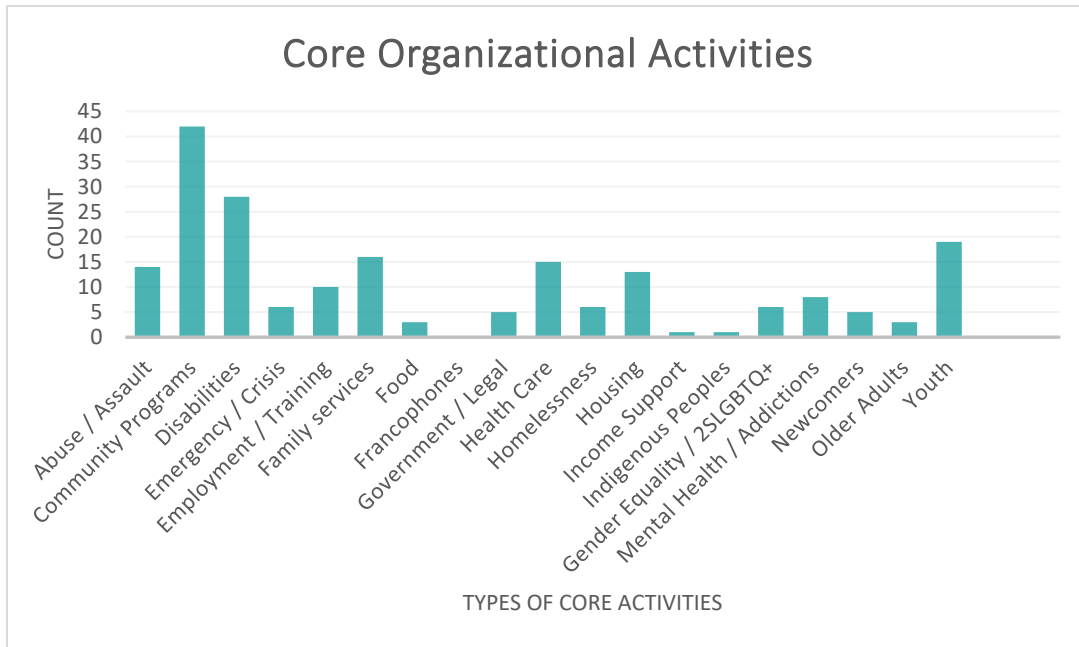
Gender Identity:

Over 86% survey respondents identify as cisgender female. The most gender-diverse group is the non-management employee.



Respondents' Organizational Profile

Participants were able to choose multiple types of activities. Among some of the other types of activities that respondents' organizations performed are in arts, data, education/literacy, environment, and animal welfare.



Detailed findings:

Creation and communication of DEI policy

Respondents were asked whether their organization has made and communicated a policy on the use of inclusive language on race and ethnicity, gender, gender identity and gender expression, sexual orientation, disability, and other dimensions. It was curious to note the difference of opinions among the 3 groups (board, management, and non-management employees).

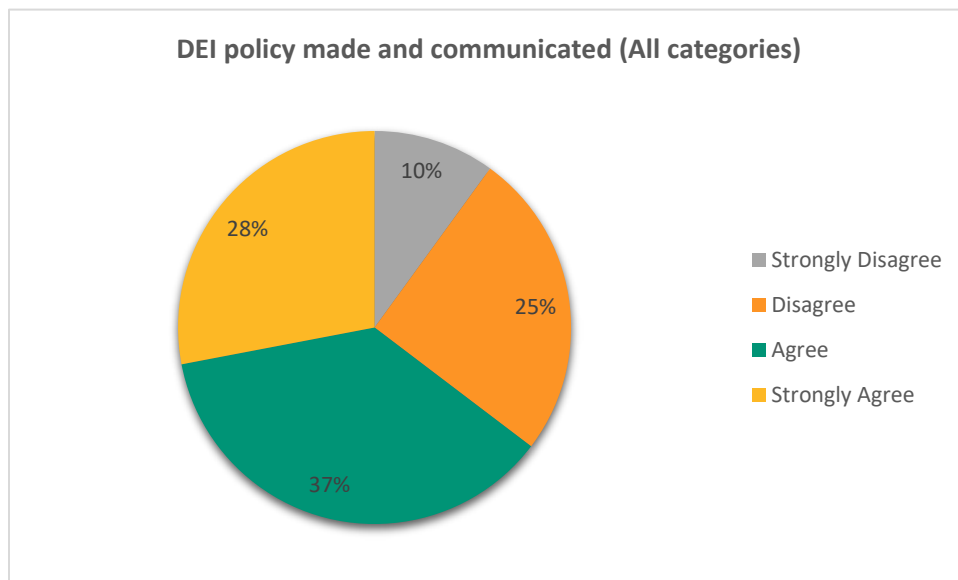


Chart: 65% of total respondents agreed or strongly agreed with the statement, 35% disagreed or strongly disagreed

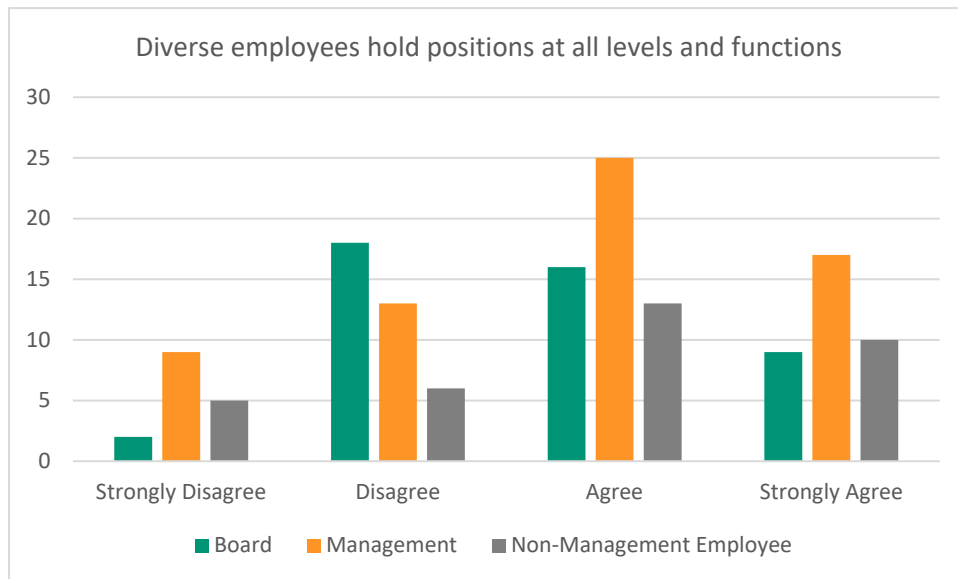
It’s interesting to note that non-management employees rated their organizations more highly as having and communicated a policy on DEI issues than senior management or board members. A whopping 82% of non-management employees agreed or strongly agreed that their DEI policy was made and communicated, compared to 54% of management and 68% of board members. The numbers point to different standards of communication among the various workplace segments.

Employee Diversity across the organization

The survey asked respondents to reflect on the statement “Diverse employees hold positions at all levels and functions.” The board was split at approximately 50/50 regarding this. Majority of the management and non-management employees either

agree or strongly agree with the notion that diverse employees exist at all levels and functions.

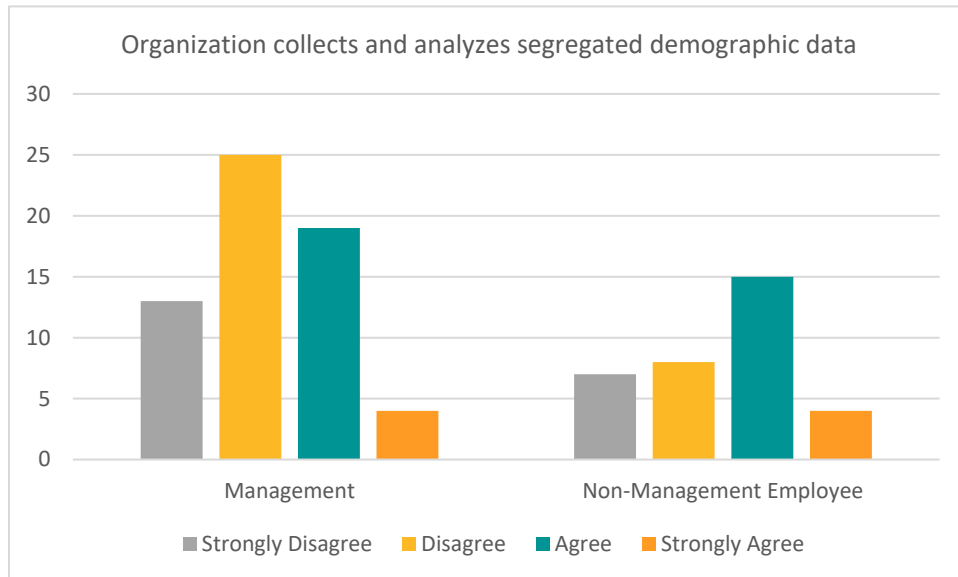
The responses give rise to the interesting area to dive deeper into thinking about what diversity means especially to nonprofit board members. From an age perspective, the board trends older but is still reasonably diverse but from sexual orientation, race, and gender identity board remain quite homogenous.



Forty-five percent of board members disagreed that there is diversity within the organization, compared to 34% of senior management. Non-management employees had the highest rate of agreement (68%) about diversity at all stages in the organization. We have seen that the non-management category was the most visibly diverse group, especially compared to boards. This raises questions whether the 3 categories of respondents have been biased by their own composition while reflecting on overall diversity.

Collecting segregated employee data

Management and non-management respondents were asked to respond to the following statement - *Organization collects and analyzes segregated demographic data about its employee population, the distribution by level, and its reflection of the demographics of the community/region in which it operates.*



Key takeaways from this question were:

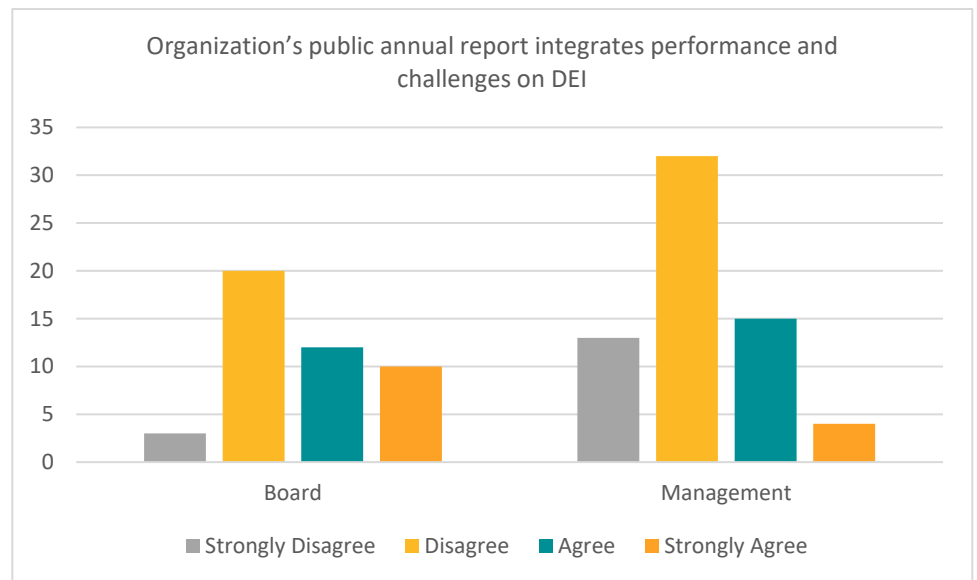
- Strongly Disagree: **20%** of the full group (management & non-management employees)
- Disagree: **33.7%** (full), **39%** (management), **23.5%** (non-management employee)
- Agree: **34.7%** (full), **29.7%** (management), **44%** (non-management employee)
- Strongly Agree: **11%** full group, management & non-management employee

Management trends toward ranking this answer lower than non-management employees. **59.4%** senior leaders either disagreed or strongly disagreed with the statement about data collection, compared to only **35%** of non-management employees. It is possible that non-management employees have the most frequent interactions with data collection mechanisms leading to a skewed perspective. Another likely explanation is that management would have more accurate information on what is being collected and reported. On the contrary, employees may assume this is being done and may look on it favorably, as a way to ensure diversity or unfavorably as a method of discrimination

Reporting on representation and diversity

It has been established in the nonprofit sector that ‘what gets measured, gets done.’ The importance of reporting on DEI indicators have been exemplified in the literature review of this environmental scan as organizations that were transparent about reporting the demographics of their staff composition, showed higher levels of diversity and inclusion. Thus, board members and senior leaders of this survey were asked to share their opinion on the extent at which their organization’s public annual report integrates its performance on DEI and includes an accurate assessment of its challenges.

70% of management answered no - management feels strongly that the annual report does not include an accurate assessment of DEI challenges. On the other hand, the board is quite equally split - **51%** thought that their reporting on diversity, equity, and inclusion is inadequate.



Key Informant Interviews

To obtain an understanding of the experiences of those on the frontline of DEI work, **18** senior staff, board members and community members were interviewed. The individuals selected for interviews were connected to organizations in Waterloo Region with a commitment to addressing diversity, equity, and inclusion (DEI). This commitment was demonstrated by the organizations' mission, vision, or specific programs. Of the **18** interviewees, **6** identified as BIPOC and **2** as 2SLGBTQ+.

Key Findings

Senior Leaders

Recurring themes:

- High level of responsibility & accountability to make change
- Process of improving DEI is complex and continuous
- Negative attitudes towards DEI
- Challenge of moving from understanding to action
- Previous experiences of tokenism

Perceived Barriers Towards Greater Diversity, Equity and Inclusion

- Visualization
- Confidence
- Gender Discrimination

Board members

Recurring themes:

- Diversifying board makeup through succession planning
- Importance of dedicated resources for DEI
- Need for increased knowledge and education
- Including youth on boards:

Perceived Barriers Towards Greater Diversity, Equity and Inclusion

- Current board makeup
- Unpaid time commitment

Stakeholders (community members, frontline staff)

Recurring themes:

- Value of working on boards
- Representation on boards
- Leadership journey
- Factors for choosing boards

Perceived barriers towards diversity, equity, and inclusion

- Fear and experience of discrimination
- Focus on survival jobs for immigrants
- Time and availability
- Strict requirements

Detailed Findings - Senior Staff

High level of responsibility & accountability to make change: many senior leaders felt like singular champions of DEI within their workplace or organization. One individual phrased it like this,

"[Colleagues] make me feel like I am solely responsible for "fixing diversity" within our workplace when it needs to be a conscious team effort and a shift in everyone's frame of mind - Senior Leader

Process of improving DEI is complex and continuous: consensus formed around the notion that many organizations do not know how big this work is. It is not something that can be fixed overnight. Therefore, many suggested the need for continuous support and knowledge development about what DEI is, what it looks like in organizations at all levels, and what it looks like in everyday life.

Negative attitudes towards DEI: whether it was towards an individual championing this work within their organization or someone who identified as part of the underrepresented community within leadership, microaggressions are still prevalent and felt daily. Examples included: backhanded compliments, behavioral slights, and open hostility.

"Came back from vacation and someone else was using my office" - Senior leader who identifies as queer cis-gender

Challenge of moving from understanding to action: the implementation of actionable DEI is still a struggle within organizations. Numerous interviewees noted that following the major public events which occurred over the past two years, DEI committees have been set up and steps have been made in order to better understand the systemic issues at hand. However, there is a disconnect between gaining awareness and knowledge, and taking action to make meaningful changes. For example, a well-meaning social media post may be made to support pride

month, but what are the *actionable* steps being made *within* the organization and its culture to improve the workplace for those individuals.

Previous experiences of tokenism: at one point or another in their career, interviewees from underrepresented communities felt that they were hired to be the “token women” or “diversity card” within management or senior leadership. This had a real impact on their ability to be effective in their roles and to be seen for their skills and experience.

“I was once hired in a token position and wasn’t given any place to exercise my vision” – Senior Leader of a community-based organization

Perceived Barriers Towards Greater Diversity, Equity and Inclusion

Visualization: when an individual is looking at the employment or membership of an organization, are they able to visualize themselves in that role? This came up often in conversation and members felt that a barrier to participation from the underrepresented community in question may, among other barriers, stem from lack of representation. If they don’t see themselves represented within staff, it may inhibit their motivation to participate.

Confidence: interview participants talked about how historically, women were told to “be quiet” and not speak their minds. This mentality affected their confidence as they grew up. Investing in women at a young age, participants suggested, will help shape the young minds of tomorrow and let them know that their opinions are valid and valued.

Gender Discrimination: it is a common saying within the nonprofit world that it is a “women majority field that is male led”. In the case of senior leadership, participants felt that this still holds true and has at one point in their career, been a barrier to their participation in senior leadership.

Detailed Findings - Board Members

Diversifying board makeup through succession planning:

when asked if DEI is a factor when recruiting new board members,

many discussed informal methods, where current board members would reach out to their networks of family, friends, and colleagues. This often yields lack of diversity and therefore, lack change to board composition. Although a shift away from this method of recruitment is trending, still more needs to be done in the formal processes of succession planning within nonprofit boards.

“So often, it’s a matter of who you know”

Importance of dedicated resources for DEI: following the numerous public and political world events in 2020-2022, many boards have formulated DEI (or EDI) committees. Interviewees saw this as a positive change, however, they noted that there are still barriers to action. In other words, yes forming a committee is good and gaining knowledge is valuable, but what is the next step forward?

Need for increased knowledge and education: the lack of knowledge about not only *what* DEI means but *how* it is incorporated into everyday work life is still lacking within boards. Furthermore, members who identified as part of the underrepresented community often felt like they were expected to “teach” others about it. In addition to board training, this suggests board members need to take responsibility for their own personal learning and growth around these topics.

Including youth on boards: the representation of the younger generations is still lacking within nonprofit boards. This is seen as problematic for several reasons, which include boards missing out on the diversity of ideas that can inform better decision making particularly for organizations who serve and work with youth.

Perceived Barriers Towards Greater Diversity, Equity and Inclusion

Current board makeup: board members interviewed were highly aware that most boards are comprised of predominantly older white women and men with the time and financial resources to commit to board work. This was seen as problematic as these boards may not be representative of the communities they serve and make boards less welcoming environments for people from different backgrounds, with different lived experiences, cultures, and identities.

“Male members ignoring my idea but then a male colleague repeating the idea which was then readily accepted”

Unpaid time commitment: when discussing why there is lack of representation from the underrepresented communities within boards, the voluntary nature of board service came up several times. Board members said that if nonprofit boards want to incorporate individuals from diverse communities, they may need to restructure expectations relating to the scheduling and timing of meetings, and/or the amount of time required.

Detailed Findings – Stakeholders (community members, frontline staff)

Value of working on boards:

there was unanimous agreement among community members and frontline staff when asked if they would recommend board work for others like them. They view

board membership as an avenue to align personal causes, passion, and professional skills. Some have emphasized that *“people of color can help disrupt current practices and trends.”*

“If you are not at the table, you will be on the plate” - Community member

Representation on boards: community members who have served on boards or are currently serving were asked if they thought those boards accurately represented the communities they cater to. Most community-based organizations formed by racialized groups saw far greater racial diversity within their boards compared to mainstream or larger non-profits.

“it’s not so much about doing FOR people, rather what you’re doing WITH people” - Frontline staff

Leadership journey: most interviewees from this category were immigrants so their leadership journeys charted similar pathways. Almost all of them stated that their current roles were a natural progression of their grassroots work, and not due to their own ambitions of being in leadership roles.

Factors for choosing boards: there is higher interest and enthusiasm among community members to join boards of organizations that perform grassroots activities. Alignment with personal passion and skills are major considerations as well. Respondents placed more value on hands-on community-based activities than serving on a board which is usually removed from beneficiaries. (Find a different quote for this)

"Once I understood my capacity and contribution, it made sense for me" - Community Member

Perceived barriers towards diversity, equity, and inclusion

Fear and experience of discrimination: all the racialized participants have shared their accounts of experiencing hostility, ageism, sexism, racism, or islamophobia in the workplace. They constantly battled assumptions of lack of skill or lack of language competency. Sometimes they have experienced hostility from their own communities for not fitting the mold of what it means to be a member. 2SLGBTQIA+ inclusion in Muslim-serving organizations has been a major struggle due to opposing pressures from mainstream policies and the communities they operate in.

"You are the wrong color, wrong gender" - Community Member

Focus on survival jobs for immigrants: there is wide practice of assuming a lack of expertise among newcomers to Canada. Even the government services offered to immigrants focus on helping them find survival jobs and not on nurturing leadership. Thus, joining boards or practicing leadership gets deprioritized. Furthermore, most newcomers never get access to information about leadership or board membership opportunities.

"Immigrant women focus on childcare and husbands are the ones looking for jobs" - Community Member

Time and availability: Muslim interviewees reflected on the differences in cultural norms and expectations on women from their backgrounds. The burden of domestic work and caregiving to other family members is much higher for Muslim women, making free time a rare privilege for them. Partners can act as barriers in many cases because there is perception that board work or volunteering is not a productive use of time for the women in their households.

Strict requirements: education qualifications or job experiences from foreign counties are not considered valid coupled with stringent requirements create

obstacles for newcomers to Canada to join non-profit leadership roles. The fact that salaries often depend on education levels create further inequity in the workplace.

Conclusion

The analysis of the survey data and interviews have reflected many of the challenges and needs identified in the literature review. The challenges of board succession planning, strict hiring requirements, and translating ideas into actions that came to light during the literature review, have been echoed by the research participants. The community stakeholders shed light on cultural differences and unequal care burdens of immigrant women which make it harder for them to volunteer time for board work. Recommendations mostly centered around developing leadership and mentorship programs that are curated for diverse cultural backgrounds and experiences. Another aspect that was elucidated was visibility and measurement lead to change. Thus, greater transparency and authenticity in reporting would result in greater diversity, equity, and inclusion.

Next steps

Understanding why certain groups of women are drastically underrepresented in non-profit decision-making and leadership roles can only be understood by speaking to women themselves. For this reason, this project seeks the involvement of women from underrepresented communities in Waterloo Region - including women from low-income backgrounds, newcomers, disabled, 2SLGBTQ+, First Peoples, and racialized communities, and those experiencing intersectionality of these

From September 2022, the project has started gathering a group of dedicated change-makers and equity seekers to take the first step towards building strategic solutions to accelerate changes that will amplify women's voices within the non-profit sector.

To accomplish this, we will be using the tools of human-centred design to gain direct insights into what women from underrepresented communities need in order to further their opportunities for leadership. The design studio will be facilitated by members of [Capacity by Design](#), a program of Capacity Canada that helps social good organizations rethink how they approach problem solving in order to develop innovative solutions to complex challenges.

The Design Challenge

Exploring the Pathways to Leadership

- Engage in a participatory design process to map the various paths women from underrepresented communities may take to leadership roles within nonprofit and charitable organizations
- Through a process of gathering women's stories & experiences, a design team of 8-12 individuals will describe the pathways to leadership from multiple perspectives
- The intention of this process is to make visible the enablers and barriers diverse women face in moving into decision-making and leadership roles in nonprofit and charitable organizations in Waterloo Region

Design Outcomes

- A visual representation of the pathways to leadership for underrepresented women in Waterloo Region
- A diagnostic tool that organizations can use to improve how they engage underrepresented women in their work
- Identification of specific areas where underrepresented women and organizations can co-design new solutions which will be the focus of the next two design studio events

Appendix [A]: Central Definitions

Gender is a social construct of identity for each person's internal and individual experience of gender. A person's gender identity may be the same as or different from their birth-assigned sex. Gender identity is fundamentally different from a person's sexual orientation.

Gender bias often refers to taking the experience of one gender and applying it to all genders, and usually means that cis-gendered men's experiences are treated as the standard. Gender bias also encompasses insensitivity by ignoring sex and gender as important variables.

Gender blindness refers to the failure to recognize that gender is an essential determinant of social outcomes impacting on projects and policies. A gender-blind approach assumes that a policy or program does not have unequal (even if unintended) outcomes for diverse population groups.

Diversity refers to the variety of similarities and differences amongst people, including, but not limited to: gender, sex, gender identity and expression, ethnicity, race, First Peoples or indigenous identity/origin, age, generation, disability, sexual orientation, culture, religion, belief system, marital status, parental status, socio-economic status, appearance, language, education, and geography (GDEIB, 2021).

Equity is related to fairness and justice. The GDEIB refers to it as taking deliberate actions to remove systemic, group, and individual barriers and obstacles that hinder opportunities and disrupt well-being. An organization can achieve equity through the identification and elimination of policies, practices, attitudes, and cultural messages that create and reinforce unfair outcomes (GDEIB, 2021).

Inclusion is a dynamic state of feeling, belonging, and operating in which diversity is leveraged and valued to create a fair, healthy, and high-performing organization or community. An organization that has an inclusive culture and environment ensures equitable access to resources and opportunities for all. It also enables individuals and groups to feel safe, respected, heard, engaged, motivated, and valued for who they are (GDEIB, 2021).

Intersectionality is the notion that an individual's identity factors overlap or intersect. It acknowledges that people are members of more than one community at the same time and live multiple, layered identities. For example, a woman who is also a new immigrant and a senior can be viewed as belonging to three separate identity groups.

Systemic barriers are policies, procedures, or practices that unfairly discriminate and can prevent individuals from participating fully in a situation. These barriers are often put into place unintentionally.

Feminism, although dynamic, refers to all genders having equal rights and opportunities. It is about respecting diverse women's experiences, identities, knowledge and strengths, and striving to empower all diverse women to realize their full rights. It is about destroying barriers and ensuring that diverse women and girls have the same opportunities in life available to boys and men.

Design-thinking is a nonlinear, human-centered, interactive process that teams use to understand users, challenge assumptions, redefine problems and create innovative solutions to prototype and test.

Governance is a broad concept that refers to the structures, systems, and practices an organization has in place to:

- Assign decision-making authorities, define how decisions are to be made, and establish the organization's strategic direction;
- Oversee the delivery of its services; the implementation of its policies, plans, programs, and projects; and the monitoring and mitigation of its key risks; and

Report on its performance in achieving intended results and use performance information to drive ongoing improvements and corrective actions.

Appendix [B]: Existing Toolkits & Resources

[The New Rules](#)

The New Rules is an initiative launched in Waterloo Region in 2020 that focuses on social responsibility in the areas of: representation, culture & respect, sourcing & policies, communications, products & services, sustainability, accessibility, and partners & communities. Get On Board, a program launched by this initiative, is an intersectional matching program for Black, Indigenous, and racialized people in Waterloo Region who want to join the boards of directors of local nonprofits to advance nonprofit sector leadership representation all while providing valuable networks, connections, and opportunities.

[Board Diversity Training: A Toolkit](#)

From the Pillar Nonprofit Network, this resource can be utilized by boards of directors, executive directors, and senior managers who are in positions of decision making for the organization.

[Capacity Canada Board Governance BootCamp](#)

Although the theme of the BootCamp differs from year to year, this past year's theme was Transforming Governance: Preparing Your Board for Diversity. This BootCamp is something organizations should keep their eye out for as the emerging trends around the benefits of equity and diversity could lead to similar BootCamp themes down the road.

[Nonprofit Quarterly: Black Women in Nonprofits Matter](#)

This resource provides pointers for evaluating and on-boarding Black women in leadership positions.

[How to Build a Diverse Nonprofit Staff](#)

This toolkit prepared by *The Chronicle of Philanthropy* has gathered numerous articles, tools, and case studies that can facilitate organizations in taking leaps to improve their diversity and succeed as a result.

[Step-By-Step: A guide to Achieving Diversity and Inclusion in the Workplace](#)

This guide uses a step-by-step approach throughout seven phases to achieve diversity and inclusiveness in the nonprofit workplace.

[Why Diversity, Equity, and Inclusion Matter for Nonprofits](#)

This post by the *National Council of Nonprofits* has gathered several resources and toolkits that encourage nonprofits to embrace diversity, equity, and inclusion as organizational values.

[25 Organizations Fighting for Gender Equality](#)

This resource can connect organizations to 25 other organizations who are already fighting for gender equality.

[Facilitating Organizational Change: Lesson from Nonprofit Participation in InclusionBoston](#)

This report uses a model developed by the collaborative work of InclusionBoston to help organizations enact change towards greater diversity, equity, and inclusion by means of eliminating racism and empowering women.

[Strategies for Diversifying Board Membership](#)

This report prepared by the *FISA Foundation* provides actionable steps, strategies, resources, and examples on how to diversify board membership.

[Unlocking Female Talent in Your Organization](#)

PwC Canada used their experiences and research to identify three main elements for success: tying diversity and inclusion to business goals; promoting sponsorship and self-advocacy; and balancing priorities: life, family, and work. As a leader in Talent and Leadership Consulting, PwC can help organizations rethink and design organizational transformation, improve the effectiveness of your workforce and help manage human capital risks.

[The What Works Toolkit](#)

An online toolkit, designed for Canadian organizations looking to adopt equity and diversity initiatives within their organizations. It includes resources designed to set out policies and approaches for recruitment, mentoring, promoting, and retention of board members and employees, as well as anti-racism, anti-harassment, and inclusive workplace strategies, and other related relevant activities and initiatives.

Appendix [C]: Interview Guides

Seniors Leaders

1. Does your organization possess a clear DEI vision and mission, and an explicit understanding of its organizational impact?
 - a. Numerical goals for equitable representation?
 - b. Goals/strategies that create inclusion and belonging?
 - c. Do you believe your organization is playing an effective role as a leader in DEI practices? How so? How have you or would you measure this?
2. How has your organization been proactive and responsive to the gender and other equity challenges that are faced by society?
3. In what ways, if any, does your organization currently possess methods to improve gender and diversity representation within your senior leadership team?
4. How is the accomplishment of DEI goals and objectives worked into your management and oversight responsibilities?
5. When you began your career, did you ever envision yourself as a leader in this profession/organization?
 - a. Who would you consider a champion/mentor to others within marginalized/ underrepresented communities?
6. Please tell us about the events that lead to your current role. How did your previous or current organization help you achieve your senior leadership position? What were the barriers (if any) that you faced to achieve this accomplishment?
7. In your opinion, what do you see as barriers for women's/underrepresented communities' participation within both services' delivery leadership and governance roles of non-profit organizations?
8. Have there been any circumstances where you have been in a leadership position where you felt like you were treated differently than your colleagues? If yes, how did you handle the situation?
If no, proceed to question 9.
9. How do you deal with resistance when you are leading a diverse group of people?
10. Have you struggled with imposter syndrome in your current position?
11. How have the impacts of the COVID-19 pandemic altered or transformed your role as a leader of this organization?
 - a. What added challenges arose?
12. Is there anything else that you would like to add for us to better understand your perspectives on DEI and gender equity within the senior leadership of nonprofit organizations?

Front line Staff and Community Members

1. Are you currently a member of a non-for-profit board?

If yes:

1. Would you recommend board membership to others like you? Why or why not?
2. Do you think your board/staff is representative of the communities you serve? Do you see value in this?
3. Tell us about the events that lead to your current role as a member of a nonprofit board?
4. What barriers, if any, did you face as you achieved this role?

If no:

1. Have you ever served as a board member of a NFP or charitable organization?
2. Have you ever been *asked* to serve in this type of role?
3. Is this something you have ever considered as an opportunity or chance?
 - a. Yes: why do you want to be involved in a non-profit board?
 - b. No: why are you not interested in joining a non-profit or charity board?
4. Would it help if it was a paid position? Do you believe the time commitment is an issue?

Board Members

1. Does your organization possess a clear gender equity vision and mission, and an explicit understanding of the business impact?
 - a. Who do you believe is an organization that is a leader in DEI within the sector?
2. How has your organization been proactive and responsive to the gender equity challenges that are faced by society?
3. How is the accomplishment of gender equity goals and objectives an important part of your management and oversight responsibilities?
4. How is board succession planning being made with a conscious effort for DEI efforts?
5. What are your views on the board recruitment processes?
 - a. How were you recruited for your role within the organization?

6. How empowered to you feel to elicit change within your organization? (i.e., your interaction with the staff relies on a middleman)
7. When you began your career, did you ever envision yourself as a leader in this sector?
 - a. Who would you consider a champion/mentor to others within marginalized/ underrepresented communities?
8. Please tell us about the events that lead to your current role. How did your previous or current organization help you achieve your senior leadership position? What were the barriers (if any) that you faced to achieve this accomplishment?
9. In your opinion, what do you see as barriers for women's/underrepresented communities' participation within both services' delivery leadership and governance roles of non-profit organizations?
10. Have there been any circumstances where you have been in a leadership position where you felt like you were treated differently than your colleagues? If yes, how did you handle the situation?
11. How do you deal with resistance when you are leading a diverse group of people?
12. How have the impacts of the COVID-19 pandemic altered or transformed your role as a leader of this organization?
 - a. What added challenges arose?
13. Is there anything else that you would like to add for us to better understand your perspectives on DEI and gender equity within the senior leadership of nonprofit organizations?

**Who else should we talk to better understand this perspective?

Appendix [D]: Survey Tool

[Note: The survey questions were customized for the category of respondents (board members, senior leaders/management employees, non-management/frontline staff, and community members). However, the introduction and demographic information sections were uniform for all survey respondents.]

Project Background

Project Title: Makeover: Women's Leadership Co-Creation Studio Advancing Equitable Non-profit Sector Change

Women from low-income backgrounds, newcomers, disabled, 2SLGBTQ+, First Peoples, and racialized communities, and those experiencing intersectionality of these, remain drastically underrepresented in non-profit decision-making and leadership roles. This project, funded by the Government of Canada through Women and Gender Equality (WAGE), aims to identify specific local barriers limiting women, trans and non-binary people from stepping into non-profit leadership roles and, with a broad spectrum of relevant underrepresented stakeholders engaging, co-creating solutions and tools for making systemic change for their own, and potentially other communities.

Ethics and Consent

At the end of this project, Capacity Canada will have contributed to addressing systemic barriers by advancing inclusive policies and practices, encouraging more equitable and effective sharing of resources, increasing networks and collaboration to accelerate systemic change, supporting positive distribution of authority, voices, and decision-making power, and finally addressing persistent harmful gender norms and attitudes to support women's equality.

The results will be treated in a sensitive manner in the public report (and in any subsequent academic article). Your identity or that of your organization will not be collected or disclosed in the report or in other means, and quotes will not be attributed unless you agree to be identified.

We are requesting your participation in this survey which will take about 15-20 minutes to complete. During the survey, you may decline to answer any question or may terminate the process at any point.

All data will be securely stored as password-protected, anonymized electronic files. Only Capacity Canada project members will have access to the original data. At the completion of the study, the electronic notes will be destroyed.

If you have any questions related to this project or the ethical measures being taken, please don't hesitate to contact hannah@capacitycanada.ca or mitul@capacitycanada.ca.

- I understand the purpose and nature of the research and agree to participate in this survey under the ethical considerations indicated.

Glossary

- DEI: Diversity, Equity, Inclusion

Diversity - Diversity is the presence of differences that may include race, gender, religion, sexual orientation, ethnicity, nationality, socioeconomic status, language, (dis)ability, age, religious commitment, or political perspective.

(<https://dei.extension.org/>)

Equity - Equity is promoting justice, impartiality, and fairness within the procedures, processes, and distribution of resources by institutions or systems. Tackling equity issues requires an understanding of the root causes of outcome disparities within our society. (<https://dei.extension.org/>)

Inclusion - Inclusion is an outcome to ensure those that are diverse feel and/or are welcome. Inclusion outcomes are met when you, your institution, and your program are truly inviting to all. To the degree to which diverse individuals are able to participate fully in the decision-making processes and development opportunities within an organization or group. (<https://dei.extension.org/>)

- Systemic Barriers: Organizational or systemic barriers are policies, procedures, or practices that unfairly discriminate and can prevent individuals from participating fully in a situation. Example: eligibility criteria that effectively exclude people based on a disability, such as requiring a job applicant to have a driver's license even though there are ways to reorganize a job to use another form of transportation. (University of Ottawa)
- Power Dynamics: Power imbalances based on gender, workplace or educational status, racial or ethnic backgrounds, age, disability, sexual orientation, or economic class could impact and violate the human right of equality. (UN Secretary General)
- Power: Power is the capacity of individuals or groups to decide or influence who gets what, who does what, who decides what, and who sets the agenda. (namati.org)
- Underrepresented Groups: Populations that have been-and remain-underrepresented among practitioners in the field and marginalized in the broader society. This can refer to gender, race/ethnicity, physical or mental ability, 2SLGBTQ+ status, and many more. Also referred to as minorities, underrepresented minorities, or marginalized populations. (IGI Global)

- **Dominant Groups:** A dominant group is positively privileged, unstigmatized, and generally favored by the institutions of society, particularly the social, economic, political, and educational systems. For example, Heterosexual people are the dominant group compared to 2SLGBTQ+ communities. (Canadian Race Relations Foundation)
- **Work-life Integration:** Work-life integration entails balancing personal and professional obligations. Rather than creating a conflict between the two, work-life integration aims to bring them together in a way that benefits both. Individually, it entails keeping track of a timetable that satisfies both your own and your company's requirements. (Haas School of Business, UC Berkeley)

Instructions

Answer the questions to the best of your knowledge and consider your organization's overall status on DEI issues. For example, you might think the organization is doing really well on gender equity but struggling to achieve racial equity. In these cases, consider the overall progress of your organization

Demographics

1. What is your age range?
 - a. 18-24
 - b. 25-34
 - c. 35-44
 - d. 45-54
 - e. 55-64
 - f. 65+
 - g. Prefer not to answer
2. Race:
 - a. Arab
 - b. Black
 - c. East Asian (e.g., Chinese, Japanese, Korean)
 - d. Indigenous / First Nations
 - e. Latin American
 - f. South Asian (e.g., Bangladeshi, Indian, Pakistani)
 - g. Southeast Asian (e.g., Filipino, Vietnamese, Cambodian)
 - h. White
3. Education:
 - a. Less than high school diploma or its equivalent
 - b. High school diploma or a high school equivalency certificate

- c. Trades certificate or diploma
 - d. College, CEGEP or other non-university certificate or diploma (other than trades certificates or diplomas)
 - e. University certificate or diploma below the bachelor's level
 - f. Bachelor's degree (e.g., B.A., B.A. (Hons), B.Sc., B.Ed., LL.B.)
 - g. University certificate, diploma, or degree above the bachelor's level
 - h. Prefer not to answer
4. Gender Identity:
- a. Agender
 - b. Genderfluid
 - c. Female
 - d. Male
 - e. Non-binary
 - f. Transgender
 - g. Two Spirit
 - h. Other
 - i. Prefer not to answer
5. Sexual Orientation:
- a. Asexual
 - b. Bisexual
 - c. Gay/Lesbian
 - d. Heterosexual
 - e. Pansexual
 - f. Other
 - g. Prefer not to answer
6. Number of dependent family members:
- a. 0
 - b. 1
 - c. 2
 - d. 3
 - e. 4
 - f. More than 4
 - g. Prefer not to answer
7. Annual household income:
- a. <\$25,000
 - b. \$25,000 - \$50,000
 - c. \$50,000 - \$75,000
 - d. \$75,000 - \$100,000
 - e. \$100,001+

- f. Prefer not to answer
- 8. What is your role within not-for-profits?
 - a. Board
 - b. Management
 - c. Non-management employee
 - d. Community Member

Survey Questions: Board Members

1. Primary focus of organizational activities. (You can choose up to 2).
 - a. Abuse / Assault
 - b. Community Programs
 - c. Disabilities
 - d. Emergency / Crisis
 - e. Employment / Training
 - f. Family services
 - g. Food
 - h. Francophones
 - i. Government / Legal
 - j. Health Care
 - k. Homelessness
 - l. Housing
 - m. Income Support
 - n. Indigenous Peoples
 - o. Gender Equality / 2SLGBTQ+
 - p. Mental Health / Addictions
 - q. Newcomers
 - r. Older Adults
 - s. Youth
 - t. Prefer not to answer
 - u. Other

For the subsequent questions, respondents were asked to respond to each statement with one option from Strongly Disagree (1), Disagree (2), Agree (3), Strongly Agree (4).

2. DEI strategy is an integral part of the overall strategy and is reflected in vision, values, policies, and practices.
3. The organization is making significant progress in achieving the goals set out in the DEI strategy.
4. The most senior person responsible for DEI is an equal and influential partner on the senior leadership team.
5. The organization's governance structure and Board elections are supported by fair, inclusive, and equitable practices to mitigate concentrations of power and dominance.
6. Board recruitment practices result in measurable, transparent, and equitable recruitment.
7. Diverse employees hold positions at all levels and functions.

8. The organization maintains equitable job design, classification, and compensation practices.
9. Regular reviews of pay differentials are conducted and discrepancies between underrepresented groups and dominant groups are eliminated.
10. All leaders model and encourage work-life integration.
11. Working part-time, job sharing, working remotely, and other flexible work arrangements are available for all appropriate positions and levels.
12. The organization regularly reports and reviews progress against benchmarks and their own strategic goals.
13. The organization has made and communicated a policy on the use of inclusive language on race and ethnicity, gender, gender identity and gender expression, sexual orientation, disability, and other dimensions.
14. The organization uses clear and transparent communication in naming and dealing with challenging issues such as racism, sexism, homophobia, privilege, toxic masculinity, and white supremacy.
15. The organization's public annual report integrates its performance on DEI and includes an accurate assessment of its challenges.
16. The organization provides DEI learning programs.
17. Why would you recommend board membership to others like you?
 - a. Opportunity to positively impact the community
 - b. Personal growth and development
 - c. Passionate about the cause
 - d. Networking / meeting new people
 - e. Professional development
 - f. Involvement is valued by employers / adds value to career path
 - g. Opportunity to volunteer that matches their skills
 - h. Opportunity to work with diverse groups of people with unique perspectives and experiences
 - i. Other (please specify)
18. Why would you not recommend board membership to others like you?
 - a. Takes too much time away from family obligations
 - b. Takes too much time away from work obligations
 - c. I do not see the value in this type of work
 - d. I experienced or feared discrimination
 - e. There is no monetary compensation
 - f. I was not aware that board membership was a volunteer position
 - g. I'm not confident in their abilities
 - h. Not enough people like them are on boards
 - i. Their contributions will not be valued

- j. Other (please specify)
- 19. Would you be interested in learning more about how to be involved in these co-creation events or being contacted to tell your leadership story?
 - a. Yes
 - b. No
- 20. If you would like to receive more information and updates about the project, please provide your email address below.

Closing Message

Thank you for participating in our survey. If you would like to receive more information and updates about the project, please provide your email address.

Survey Questions: Management/Senior Leaders

1. Does your organization have charitable status?
 - a. Yes
 - b. No
 - c. Prefer not to answer
2. Number of paid employees
 - a. 0-5
 - b. 5-10
 - c. 10-25
 - d. 25-50
 - e. 50+
 - f. Other
3. Primary focus of organizational activities. (You can choose up to 2).
 - a. Abuse / Assault
 - b. Community Programs
 - c. Disabilities
 - d. Emergency / Crisis
 - e. Employment / Training
 - f. Family services
 - g. Food
 - h. Francophones
 - i. Government / Legal
 - j. Health Care
 - k. Homelessness
 - l. Housing
 - m. Income Support

- n. Indigenous Peoples
 - o. Gender Equality / 2SLGBTQ+
 - p. Mental Health / Addictions
 - q. Newcomers
 - r. Older Adults
 - s. Youth
 - t. Prefer not to answer
 - u. Other
4. How long has your organization existed?
- a. 0-2 years
 - b. 3-10 years
 - c. 11-25 years
 - d. 25+ years
5. What is your annual budget?
- a. < 50,000
 - b. 50,001 - 100,000
 - c. 100,001 - 250,000
 - d. 250,001 - 500,000
 - e. 500,000 - 1,000,000
 - f. 1,000,001 - 2,000,000
 - g. 2,000,001 - 5,000,000
 - h. 5,000,001 - 10,000,000
 - i. 10,000,001 - 25,000,000
 - j. 25,000,001 - 50,000,000
 - k. > 50,000,000

For the subsequent questions, respondents were asked to respond to each statement with one option from Strongly Disagree (1), Disagree (2), Agree (3), Strongly Agree (4).

- 6. DEI strategy is an integral part of the overall strategy and is reflected in vision, values, policies, and practices.
- 7. The organization is making significant progress in achieving the goals set out in the DEI strategy.
- 8. Leaders are change agents and role models for DEI who inspire others to take individual responsibility and become role models themselves.
- 9. The most senior person responsible for DEI is an equal and influential partner on the senior leadership team.
- 10. The organization's governance structure and Board elections are supported by fair, inclusive, and equitable practices to mitigate concentrations of power and dominance.

11. The organization's attraction and hiring processes result in measurable, transparent, and equitable recruitment.
12. Diverse employees hold positions at all levels and functions.
13. The organization maintains equitable job design, classification, and compensation practices.
14. Regular reviews of pay differentials are conducted and discrepancies between underrepresented groups and dominant groups are eliminated.
15. All leaders model and encourage work-life integration.
16. Working part-time, job sharing, working remotely, and other flexible work arrangements are available for all appropriate positions and levels.
17. The organization regularly reports and reviews progress against benchmarks and their own strategic goals.
18. The organization collects and analyzes segregated demographic data about its employee population, the distribution by level, and its reflection of the demographics of the community/region in which it operates.
19. The organization has made and communicated a policy on the use of inclusive language on race and ethnicity, gender, gender identity and gender expression, sexual orientation, disability, and other dimensions.
20. The organization uses clear and transparent communication in naming and dealing with challenging issues such as racism, sexism, homophobia, privilege, toxic masculinity, and white supremacy.
21. The organization's public annual report integrates its performance on DEI and includes an accurate assessment of its challenges.
22. The organization provides DEI learning programs.
23. DEI content is adapted and customized to the local environment, cultural nuances, languages, and social and political realities.
24. The organization successfully leverages diverse teams, including diversity networks, customers, partners, the community, and other stakeholders, to improve its products and services.
25. Would you be interested in learning more about how to be involved in these co-creation events or being contacted to tell your leadership story?
 - a. Yes
 - b. No
26. If you would like to receive more information and updates about the project, please provide your email address below.

Closing Message

Thank you for participating in our survey. If you would like to receive more information and updates about the project, please provide your email address.

Survey Questions: Non-management employees

1. Primary focus of organizational activities. (You can choose up to 2).
 - a. Abuse / Assault
 - b. Community Programs
 - c. Disabilities
 - d. Emergency / Crisis
 - e. Employment / Training
 - f. Family services
 - g. Food
 - h. Francophones
 - i. Government / Legal
 - j. Health Care
 - k. Homelessness
 - l. Housing
 - m. Income Support
 - n. Indigenous Peoples
 - o. Gender Equality / 2SLGBTQ+
 - p. Mental Health / Addictions
 - q. Newcomers
 - r. Older Adults
 - s. Youth
 - t. Prefer not to answer
 - u. Other

For the subsequent questions, respondents were asked to respond to each statement with one option from Strongly Disagree (1), Disagree (2), Agree (3), Strongly Agree (4).

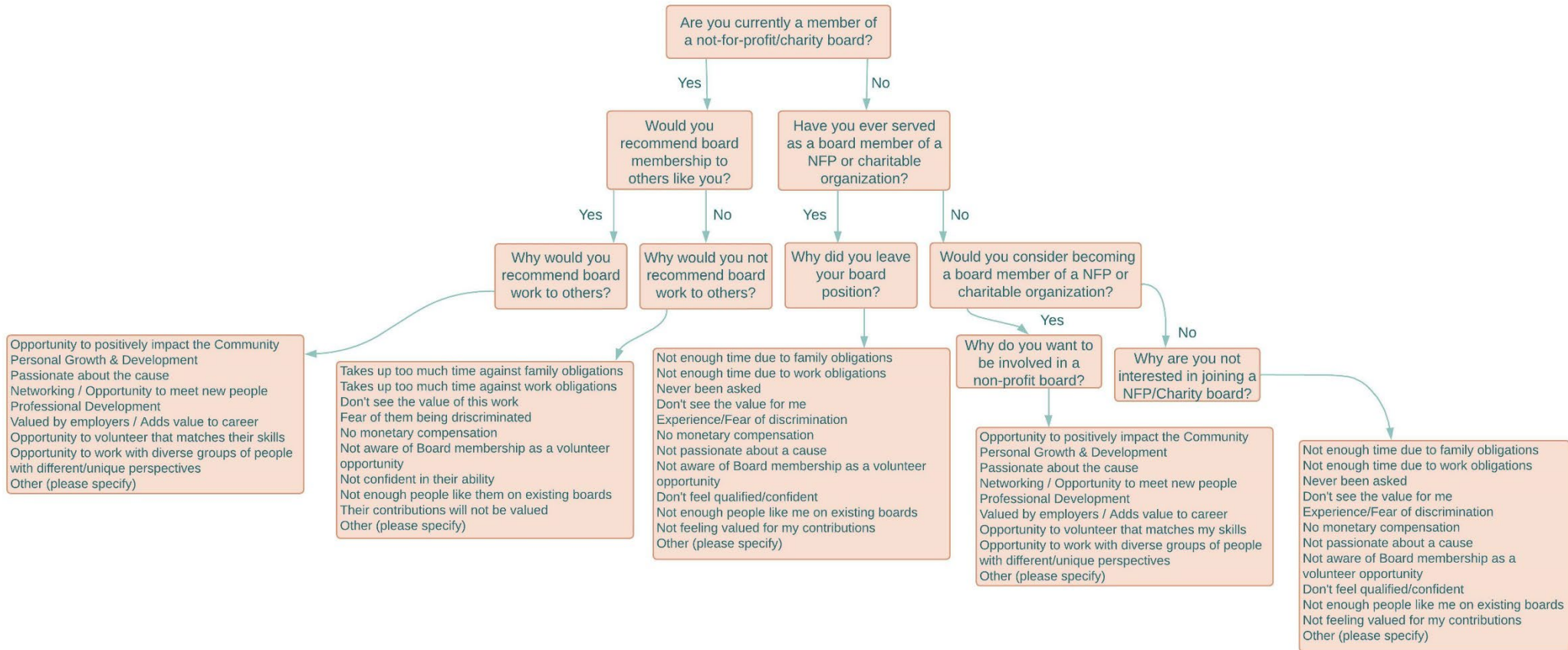
2. The organization is making significant progress in adapting processes to address DEI.
3. Leaders are change agents and role models for DEI who inspire others to take individual responsibility and become role models themselves.
4. The most senior person responsible for DEI is an equal and influential partner on the senior leadership team.
5. The organization's governance structure and Board elections are supported by fair, inclusive, and equitable practices to mitigate concentrations of power and dominance.

6. The organization's attraction and hiring processes result in measurable, transparent, and equitable recruitment.
7. Diverse employees hold positions at all levels and functions.
8. The organization maintains equitable job design, classification, and compensation practices.
9. Regular reviews of pay differentials are conducted and discrepancies between underrepresented groups and dominant groups are eliminated.
10. All leaders model and encourage work-life integration.
11. Working part-time, job sharing, working remotely, and other flexible work arrangements are available for all appropriate positions and levels.
12. The organization collects and analyzes segregated demographic data about its employee population, the distribution by level, and its reflection of the demographics of the community/region in which it operates.
13. The organization has made and communicated a policy on the use of inclusive language on race and ethnicity, gender, gender identity and gender expression, sexual orientation, disability, and other dimensions.
14. The organization uses clear and transparent communication in naming and dealing with challenging issues such as racism, sexism, homophobia, privilege, toxic masculinity, and white supremacy.
15. The organization provides DEI learning programs.
16. DEI content is adapted and customized to the local environment, cultural nuances, languages, and social and political realities.
17. The organization successfully leverages diverse teams, including diversity networks, customers, partners, the community, and other stakeholders, to improve its products and services.
18. Would you be interested in learning more about how to be involved in these co-creation events or being contacted to tell your leadership story?
 - a. Yes
 - b. No
19. If you would like to receive more information and updates about the project, please provide your email address below.

Closing Message

Thank you for participating in our survey. If you would like to receive more information and updates about the project, please provide your email address.

Survey Questions: Community Members



Closing Message

Thank you for participating in our survey. If you would like to receive more information and updates about the project, please provide your email address.

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