

Shifting Power Dynamics

Equity, diversity, and inclusion in the nonprofit sector



Equitable Recovery Collective

Foreword

Scotiabank is proud to support this vital research led by the Equitable Recovery Collective and Imagine Canada to better understand the state of nonprofit organizations' equity practices across Canada. The first step in building more equitable organizations and communities is understanding the scale of existing disparities.

Scotiabank remains invested in advancing diversity, equity, and inclusion both in its own practices and in the communities in which we live and work. It is core to our values as a business, to our employees, and to our commitment to building a bank that is here for every future.

The research is clear – certain groups face greater barriers to financial success. Scotiabank acknowledges this reality and through our \$500 million, 10-year ScotiaRISE initiative, we seek to create pathways for those who are disadvantaged to more fully participate in our economy.

In our own organization's journey, we recognize that overcoming the barriers faced by equity-deserving groups requires equity to be embedded at the core. It cannot advance without reliable engagement and data on the experiences of disadvantaged and equity-deserving groups. Data is a key tool in driving impactful change.

This research represents an important step in developing nonprofit sector capacity around equity. The research approach itself involved collaboration across a wide variety of geographically, racially, and mission diverse organizations. The work was grounded in equity at every stage and certainly that strengthens the value of its findings.

The results of this research will contribute to advancing a sector-wide dialogue around organizations' employment equity practices and the link between those practices and how these organizations show up for the communities they serve.

We hope the insights in this report strengthen approaches for delivering on social change by helping to build a more inclusive Canadian nonprofit sector.

Meigan Terry

Senior Vice President & Chief Sustainability, Social Impact, and Communications Officer
Scotiabank

The Equity Benchmarking Project

The Equity Benchmarking Project is led by a working group of the Equitable Recovery Collective, a group of nonprofit organizations working to advance equity in nonprofit sector policy, foster a more equitable funding environment, and build sector-wide capacity to advance equity in nonprofit organizations.

The goals of the Equity Benchmarking Project are to:

1. Advance equity by building relationships with a wide range of charitable and nonprofit organizations and equity-seeking groups;
2. Increase awareness of the different facets of equity including intersectionality, anti-racism and anti-oppression, justice, equity, diversity and inclusion, reconciliation and decolonization;
3. Determine courses of action the sector can take to evolve in these areas; and where practice-based experts want the sector to go;
4. Contribute to greater equity in the sector and Canadian communities.

Member organizations of the Equitable Recovery Collective and/or Equity Benchmarking Working Group are:

- Canadian Red Cross
- Disability Without Poverty
- Canadian Women's Foundation
- Community Foundations of Canada
- Egale Canada
- Foundation for Black Communities
- Imagine Canada
- Muslim Association of Canada
- National Association of Friendship Centres
- Network for the Advancement of Black Communities
- Ontario Nonprofit Network
- Philanthropic Foundations Canada
- Pillar Nonprofit Network
- PolicyWise for Children & Families
- The Circle on Philanthropy and Aboriginal Peoples in Canada

Acknowledgements

This study was made possible thanks to our Lead Partner, Scotiabank.

A special thank you to our Sector Partner, The Canadian Red Cross Society, for their support and participation.

We would also like to thank our Knowledge Partners, Community Foundations of Canada and KCI.

The Scotiabank logo, featuring the word "Scotiabank" in a bold, red, sans-serif font with a registered trademark symbol.

**Canadian
Red Cross**

**Croix-Rouge
canadienne**



**COMMUNITY
FOUNDATIONS
OF CANADA**

KCI
What's Next.

Why equity benchmarking?

The aim of the survey is to increase our understanding of what charities and nonprofits are currently doing to enhance their equity practices, internally in their dealings with staff and volunteers and externally in how they affect and interact with those they serve.

The survey is intended to be applicable to charities and nonprofits broadly, regardless of their location, size or mission. The primary focus is on measuring the extent to which organizations engage in a core set of activities and initiatives they can use to manage and advance their internal and external equity practices. The survey focuses on organizational behaviours because respondents occupying different roles across the organization (e.g., managers vs. senior leaders) are more likely to give consistent responses and because focusing

on behaviours may make results less prone to social desirability bias.

Potentially significant topics were identified by reviewing existing literature, gathering feedback from Equity Benchmarking Working Group members and consulting with potential end users. A subset was selected for inclusion in the survey based on the extent to which topics could be linked to specific behaviours, the extent to which information already exists and whether the topic was most effectively addressed by survey-based approaches.



Respondent characteristics

The characteristics of responding organizations turned out to be incredibly important for understanding how equity, diversity and inclusion principles are being applied in the Canadian nonprofit sector.

The most important of these are the equity characteristics of organizational leaders and the presence of some form of managerial structure to help organize and manage equity, diversity and inclusion-related work. These two factors are significant in virtually all dimensions measured by the survey and play a larger role than factors like sub-sector and region.

The survey divides organizations into three categories based on whether significant fractions of the leadership are from BIPOC[‡] backgrounds,

other backgrounds commonly under-represented among nonprofit leaders, or mainstream backgrounds. Similarly, organizations are categorized according to whether they have some form of committee or working group focused on equity-related issues.

Regardless of the specific dimension explored by the survey, organizations with leadership from non-mainstream backgrounds and organizations with equity working groups were more likely to engage in practices likely to enhance equity.

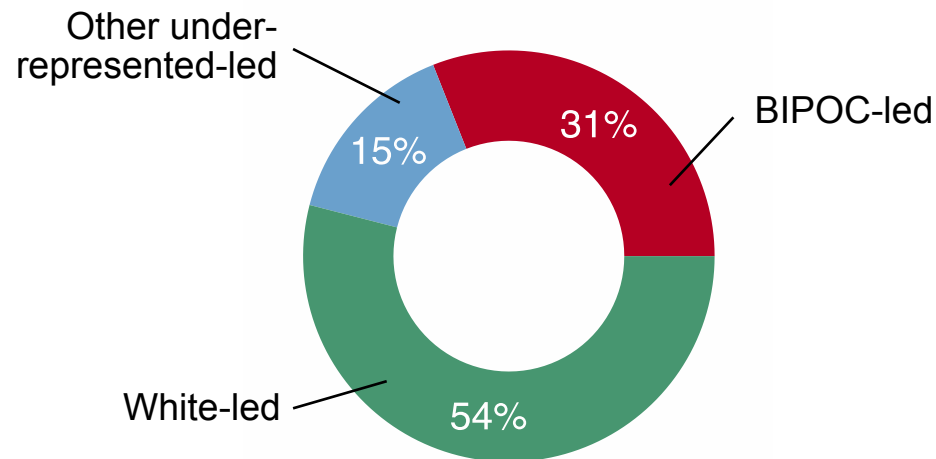
[‡]For more detail regarding our use of the term BIPOC, please refer to the glossary.



About a third of respondents were from BIPOC-led organizations and another one in seven from organizations led by other minorities.

Would you consider your organization to be BIPOC-led? / Led by people from background(s) commonly under-represented among senior leaders of nonprofit organizations?

% survey respondents (weighted)



Would you consider your organization to be BIPOC-led? / Led by people from background(s) commonly under-represented among senior leaders of nonprofit organizations?

Organizational leadership is assessed using two nested questions.

First, respondents were asked whether they considered their organization to be BIPOC-led, meaning did they consider a significant fraction of the senior leadership to be made up of people who are Black, Indigenous and/or of other non-white backgrounds. Organizations answering yes to this question are classified as **BIPOC-led**.

Respondents answering no to the first question were then asked whether they would consider their organization to be led by people from another background or backgrounds commonly under-represented among the senior leaders of nonprofit organizations. Organizations answering yes to this question are classified as being led by people from **other under-represented backgrounds**.[‡]

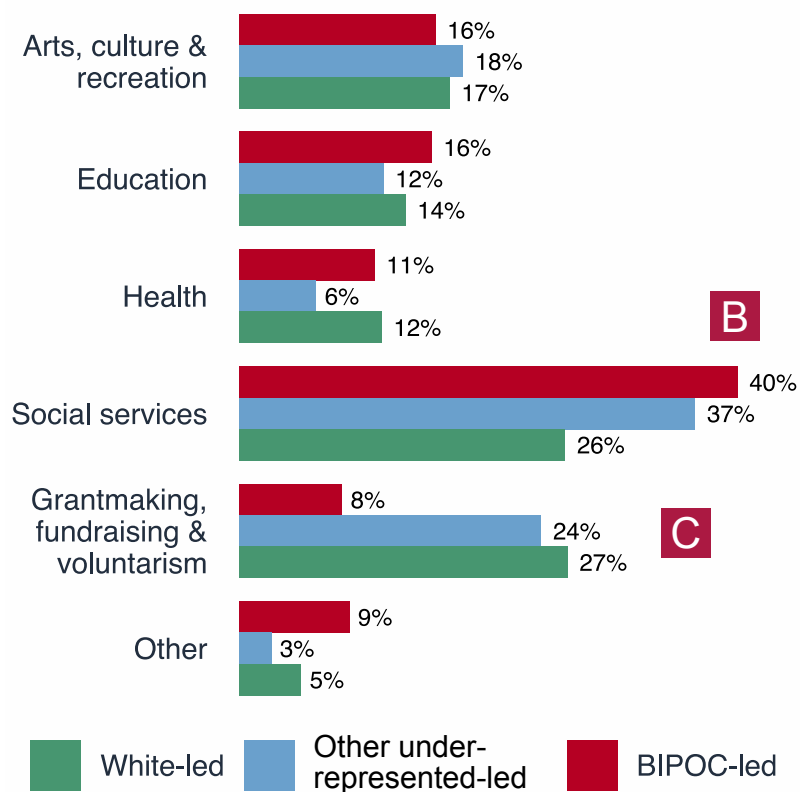
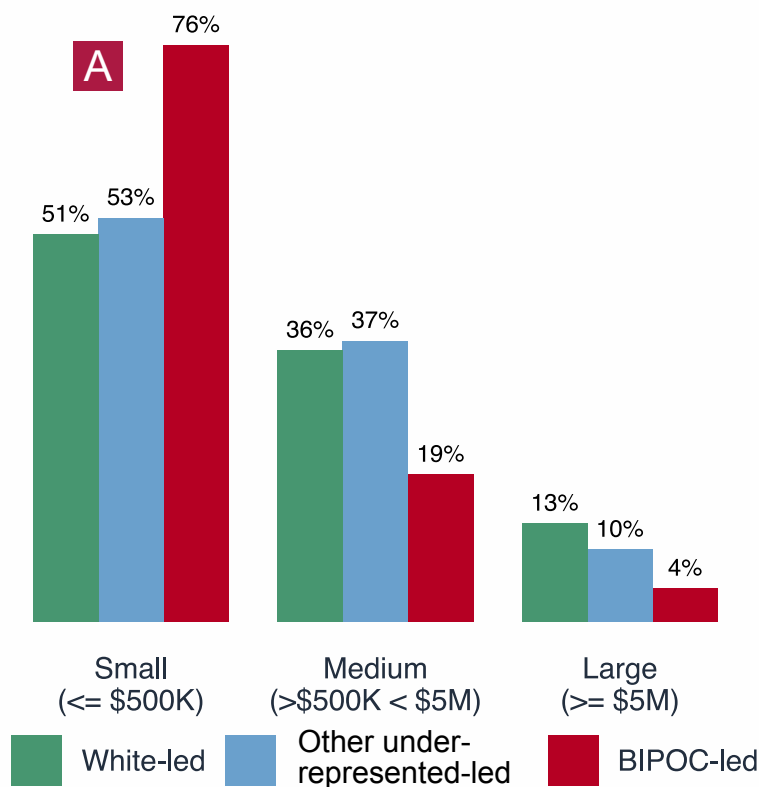
Organizations answering no to both questions are classified as **white-led**.

[‡]For more detail about the specifics of those from other under-represented backgrounds, please refer to the glossary.

Responding BIPOC-led organizations were more likely to be small and to work in particular sub-sectors.

What was your organization's total revenue from all sources last year? / What sub-sector does your organization primarily work in?

% survey respondents (weighted)



A BIPOC-led respondent organizations were markedly more likely to be smaller, with annual revenues less than \$500 thousand.

B Minority-led[‡] respondent organizations were more likely to work in the area of social services.

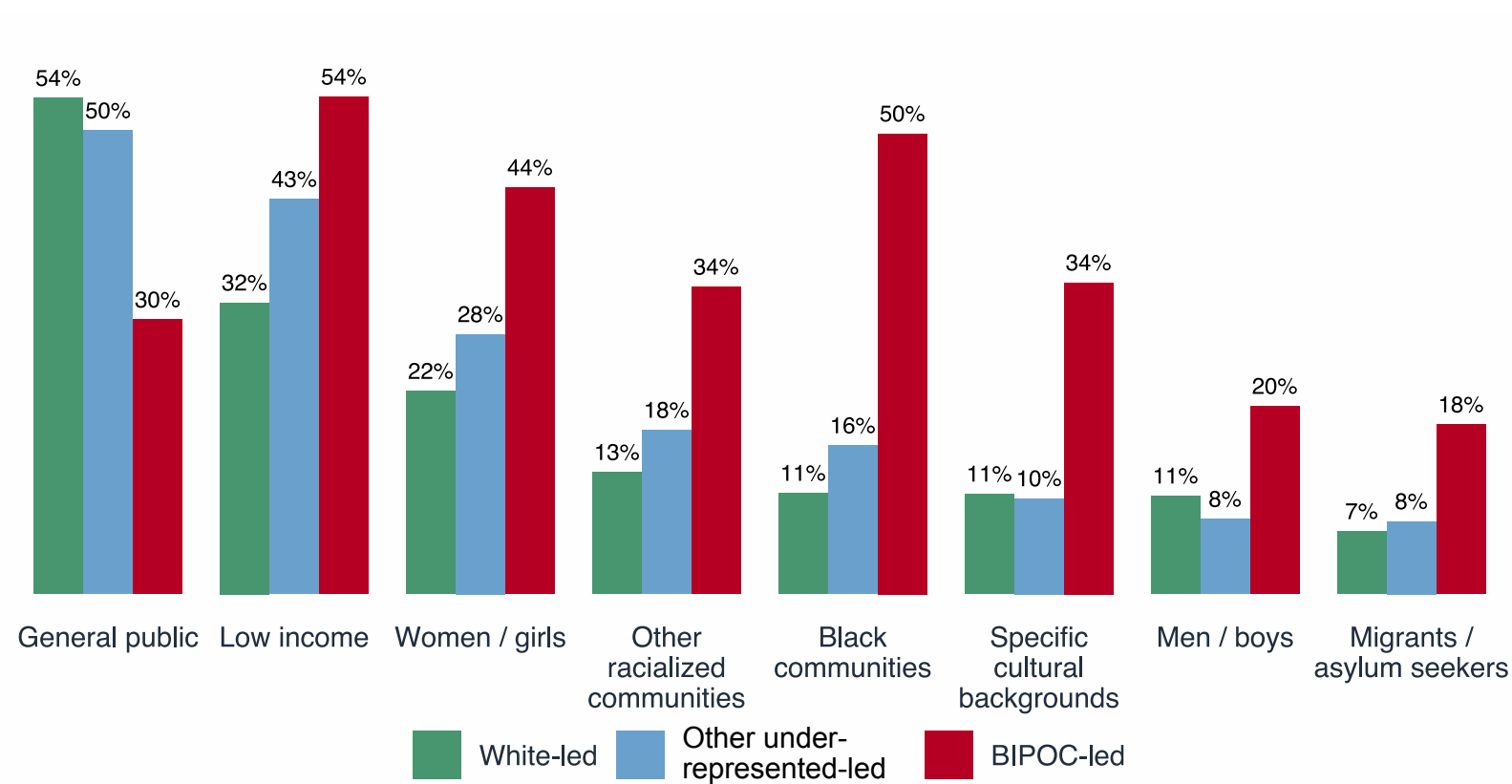
C BIPOC-led respondent organizations were much less likely to focus on grantmaking, fundraising & voluntarism and somewhat more likely to focus on “other” activities.

[‡] Organizations with leaders from BIPOC or other under-represented backgrounds.

Responding BIPOC-led organizations were also markedly more likely to have programs designed to serve equity-deserving communities.

Does your organization have any programs or services specifically focused on particular communities? By specifically focused, we mean either activities that are designed for a particular community or where a large portion of the beneficiaries come from that community.

% survey respondents (weighted)



Responding organizations were asked whether they provide programs and services focusing on particular communities.

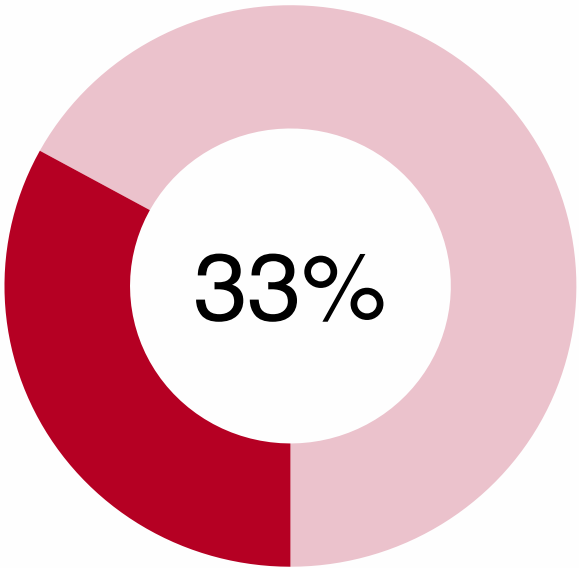
Responding BIPOC-led organizations are much more likely to deliver programs to Black and otherwise racialized or culturally distinct communities. They are also more likely to serve immigrants, women, men and low income Canadians.

BIPOC-led respondent organizations are markedly less likely to serve the general public. As will be seen, this degree of focus on particular communities significantly affects the nature and scope of their equity, diversity and inclusion-related work.

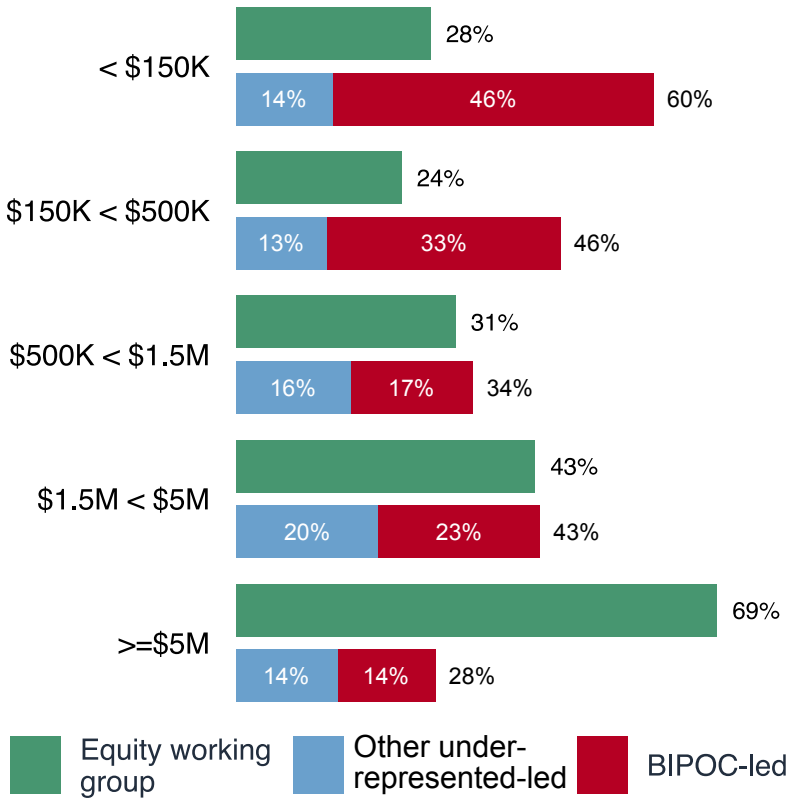
About a third of organizations have some sort of equity working group. Larger organizations are more likely to have these groups, but less likely to be BIPOC-led.

Does your organization have any sort of committee or working group focused on issues of equity, diversity and inclusion?
Would you consider your organization to be BIPOC-led? / Led by people from background(s) commonly under-represented among senior leaders of nonprofit organizations?

Have an equity working group



% organizations by annual revenue size



Overall, one third of organizations reported having an equity working group.

The likelihood of having such a group tends to increase with annual revenue size, ranging from about a quarter of organizations with less than \$500 thousand to over two thirds of organizations with \$5 million or more.

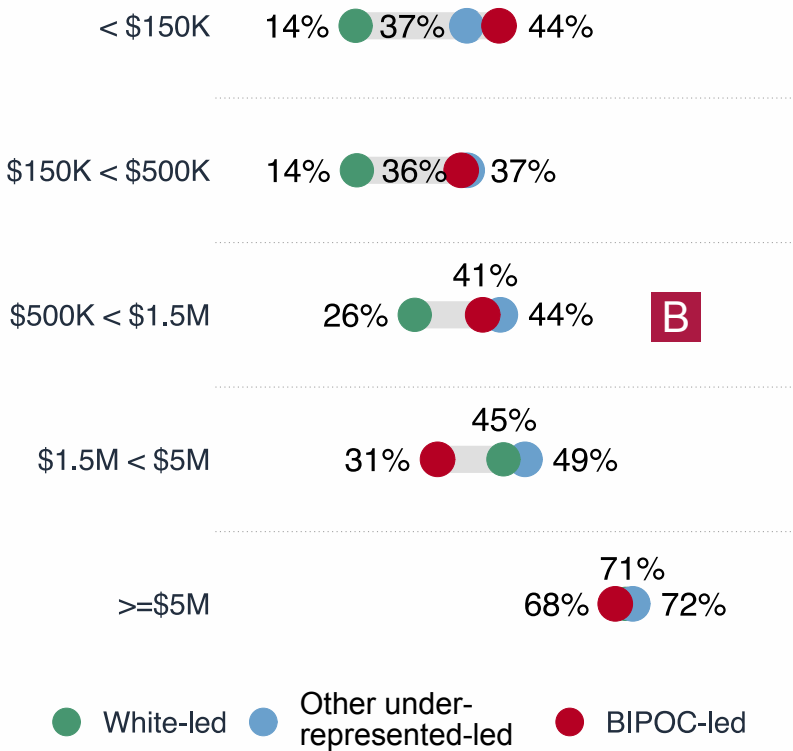
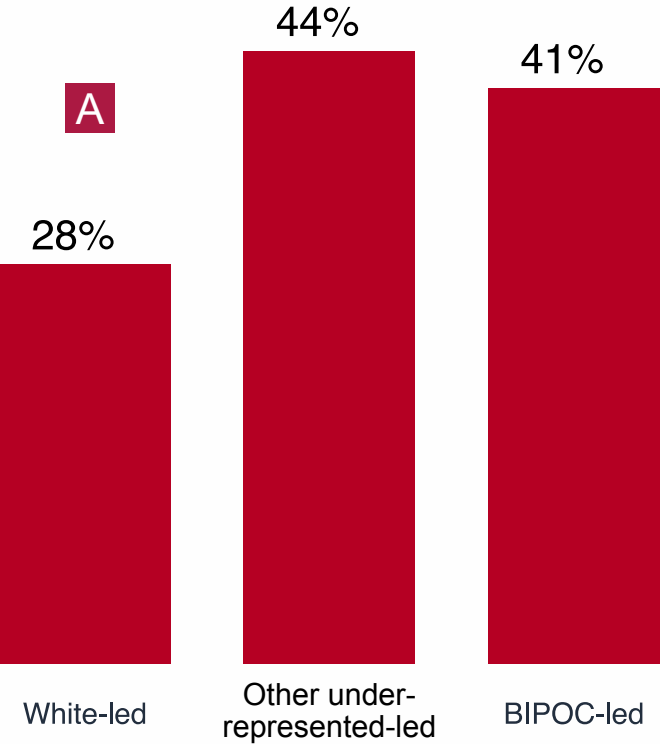
In contrast, the representation of non-white-led respondent organizations tends to decrease with revenue size.

As will be seen, both factors have significant effects on the state of organizational equity, diversity and inclusion practices.

The likelihood of having an equity working group is much higher among minority-led organizations, but only when they are small.

Does your organization have any sort of committee or working group focused on issues of equity, diversity and inclusion?

% organizations by annual revenue size and leadership



A Overall, white-led organizations are significantly less likely to have equity working groups.

B Smaller white-led organizations are less likely to have equity working groups. Once annual revenues reach \$1.5 million or more, this difference disappears.

Equity audits

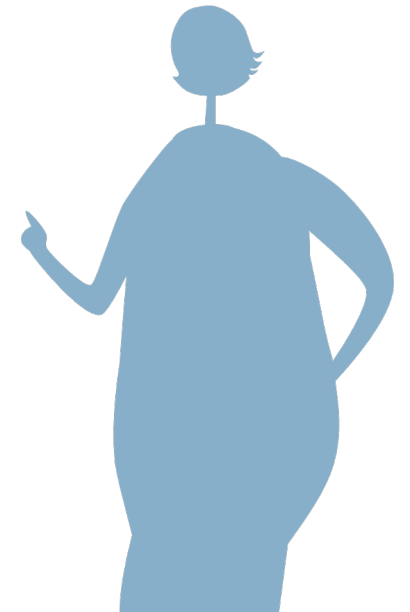
When seeking to change organizational practices, understanding the current situation is key. To help understand the role systematic review of current norms might be playing in improving equity practices, respondents were asked whether their organization had ever conducted **equity audits** of 13 common types of activities.

The survey used a broad definition in order to be applicable to the full range of organizations responding to the survey. Audits were defined as some form of systematic review using an equity, diversity and inclusion lens and no specific time horizon for the review was used.

Overall, use of equity audits is common but far from universal, even with the broad definition used. About three fifths of organizations said they had

previously reviewed some aspect of their operations. On average, these organizations looked at 3.8 different organizational activities.

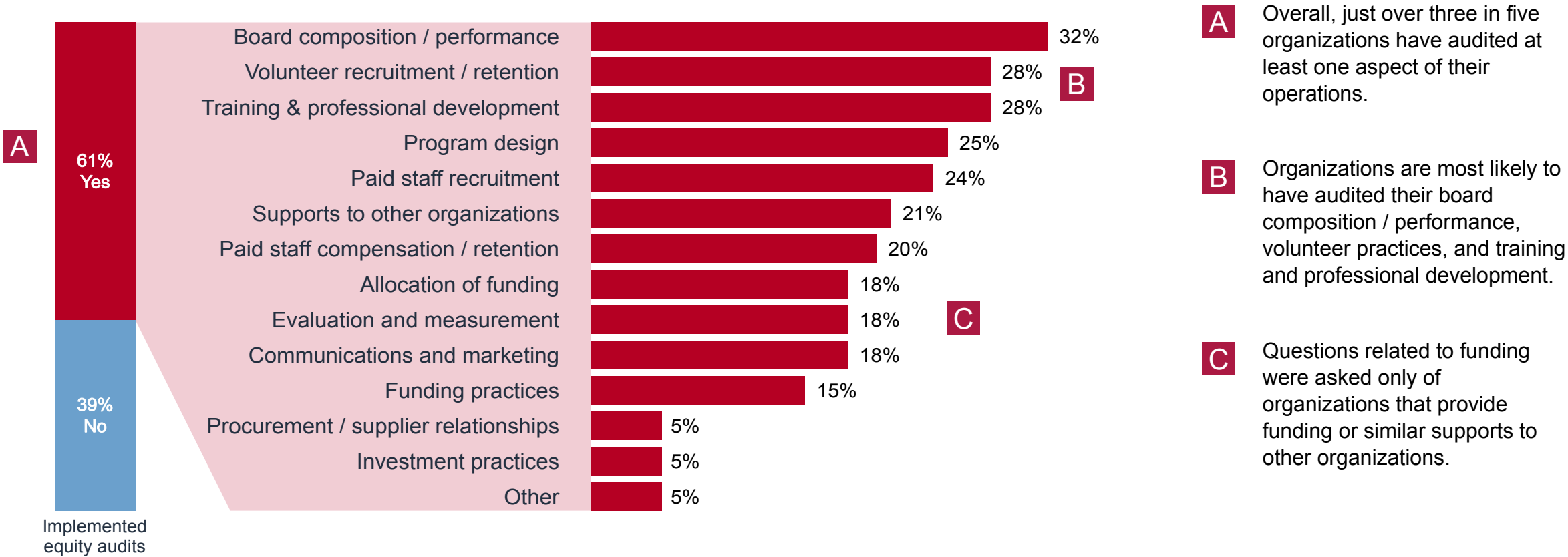
Organizations with equity working groups and organizations with leadership from non-white backgrounds were materially more likely to have audited virtually all areas of organizational activity.



Three in five organizations have audited at least one aspect of their operations using an equity, diversity and inclusion lens.

Has your organization ever conducted an equity audit of any of the following aspects of its activities?

% organizations

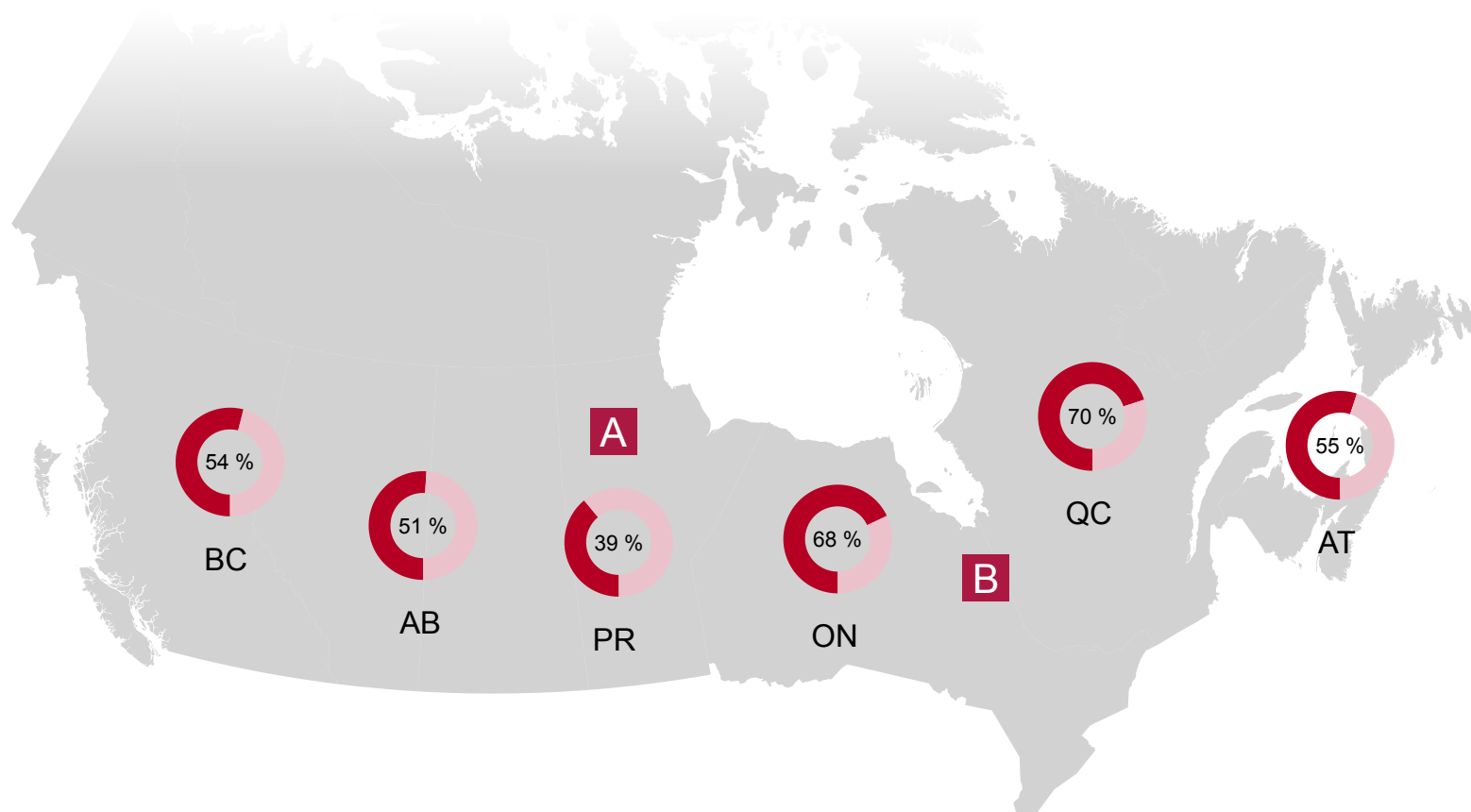


The likelihood of having conducted equity audits varies significantly by region.

Has your organization ever conducted an equity audit of any of the following aspects of its activities?

% organizations auditing at least one aspect of their activities

A Organizations in the Prairies are less likely to have conducted equity audits.

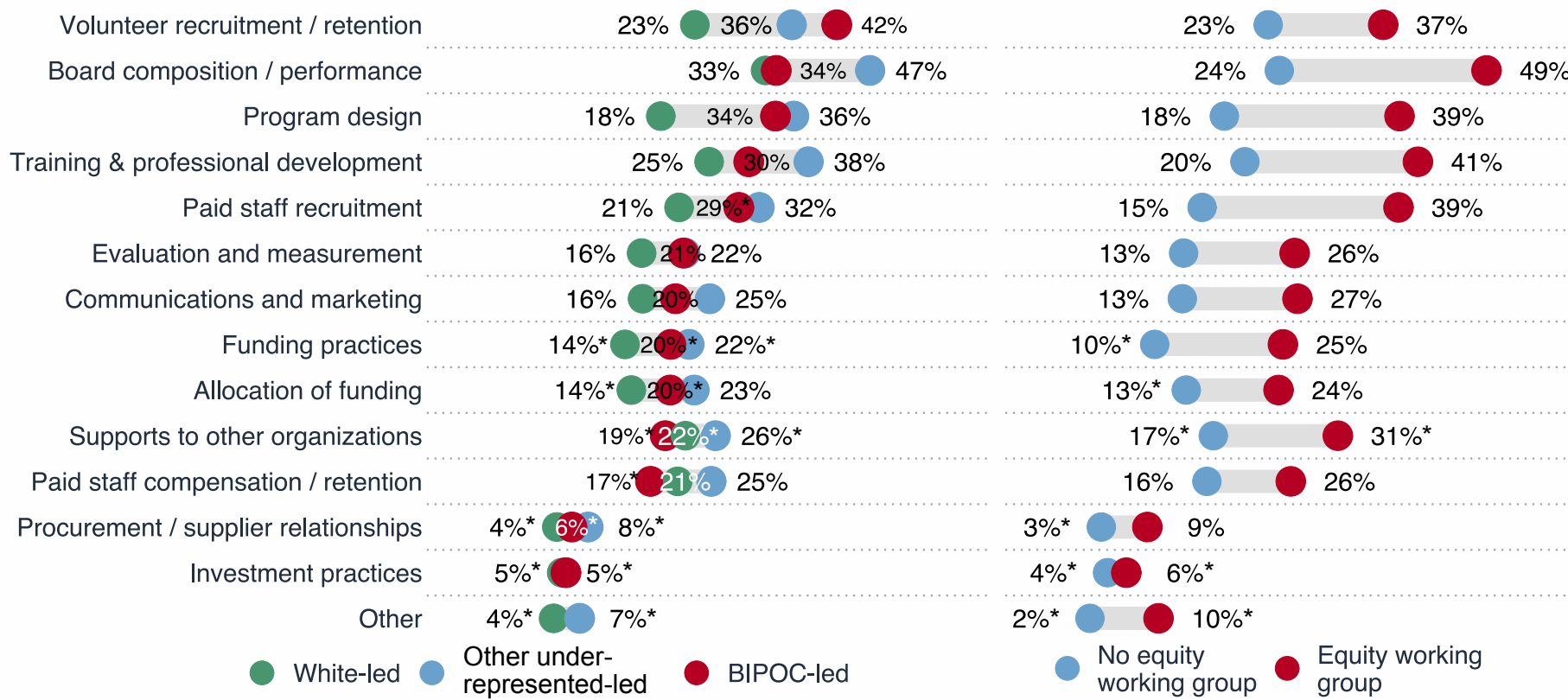


B Organizations from Ontario and Quebec are more likely to have conducted equity audits.

Both organizations that are minority-led and organizations with equity working groups are more likely to have audited virtually all aspects of their operations.

Has your organization ever conducted an equity audit of any of the following aspects of its activities?

% organizations by leadership / existence of an equity working group



Organizations led by those from other under-represented backgrounds are most likely and white-led organizations least likely to have audited most aspects of their operations. With few exceptions, BIPOC-led organizations tend to rank in between the other two groups.

Organizations with equity working groups are more likely to have audited all aspects of their operations.

* use with caution (see Methodology section for details)

Policies and procedures

The degree to which equity, diversity and inclusion is reflected in statements of policies and procedures gives important behaviourally-tied insights into organizational norms. The survey first asked respondents whether their organization has a stand-alone EDI policy and then whether EDI was specifically highlighted in 15 other types of organizational policy. To ensure questions were broadly applicable, the survey included quite common policies such as statements of organizational values as well as less common policies such as vendor selection.

Survey results show that organizations were more likely to highlight EDI in other policies, particularly higher-level policies, than they were to have stand-alone policies. Not surprisingly, they were less likely to have more specialized or operationally

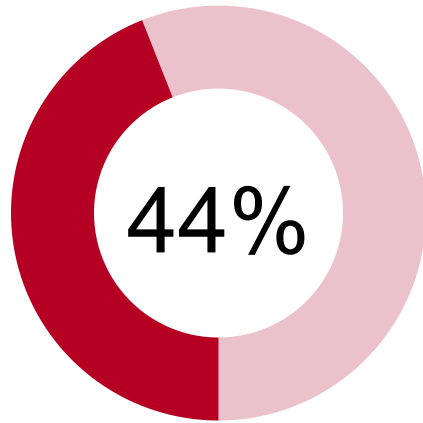
focused policies highlighting EDI. Organizations with equity working groups and organizations with minority leadership, particularly BIPOC leadership, were more likely to have policies highlighting EDI.

While the mere existence of policies and procedures does not guarantee that organizations will follow them, results show a very high degree of correlation between the existence of policies specifically highlighting EDI and equity-enhancing practices measured by other components of the survey.

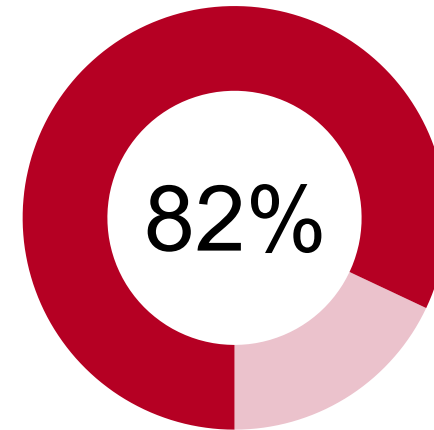


While most organizations incorporate equity, diversity and inclusion into their operational policies to at least some extent, significantly fewer have a dedicated, stand-alone EDI policy.

% organizations



Does your organization have any sort of stand-alone document or body of policies related to equity, diversity and inclusion?

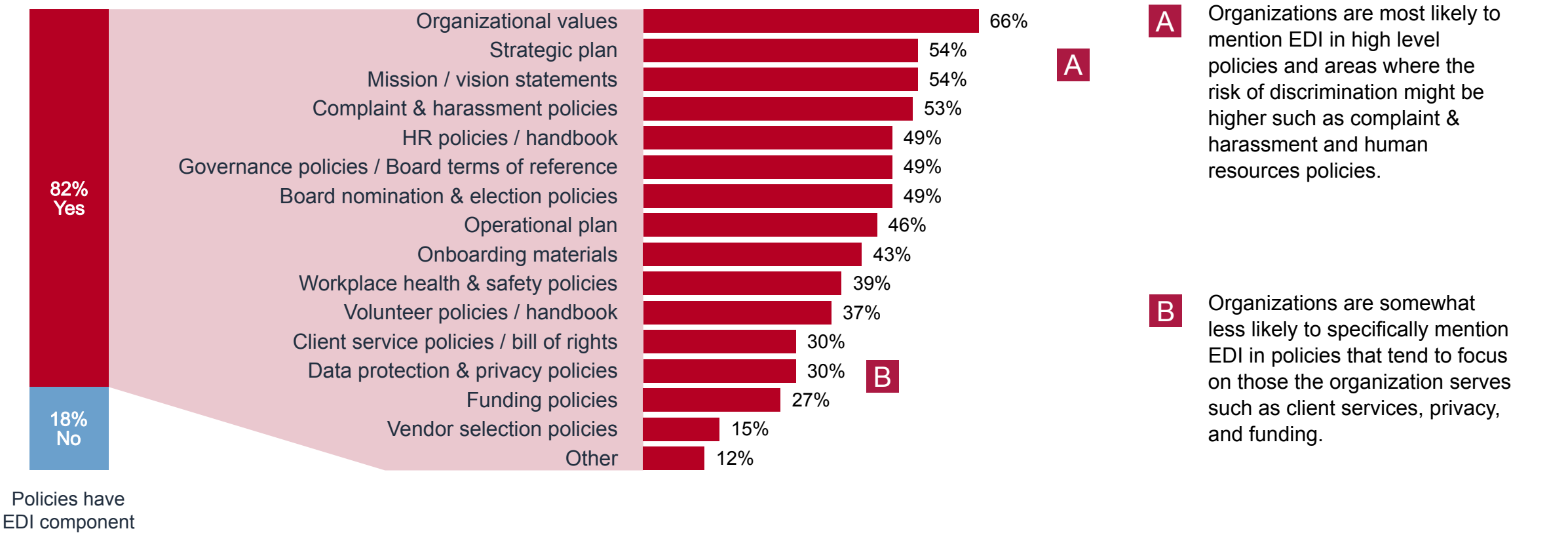


Organization has at least one policy specifically highlighting equity, diversity and inclusion.

Equity, diversity and inclusion are most commonly highlighted in high-level organizational policies.

Is equity, diversity and inclusion specifically highlighted in each of the following?

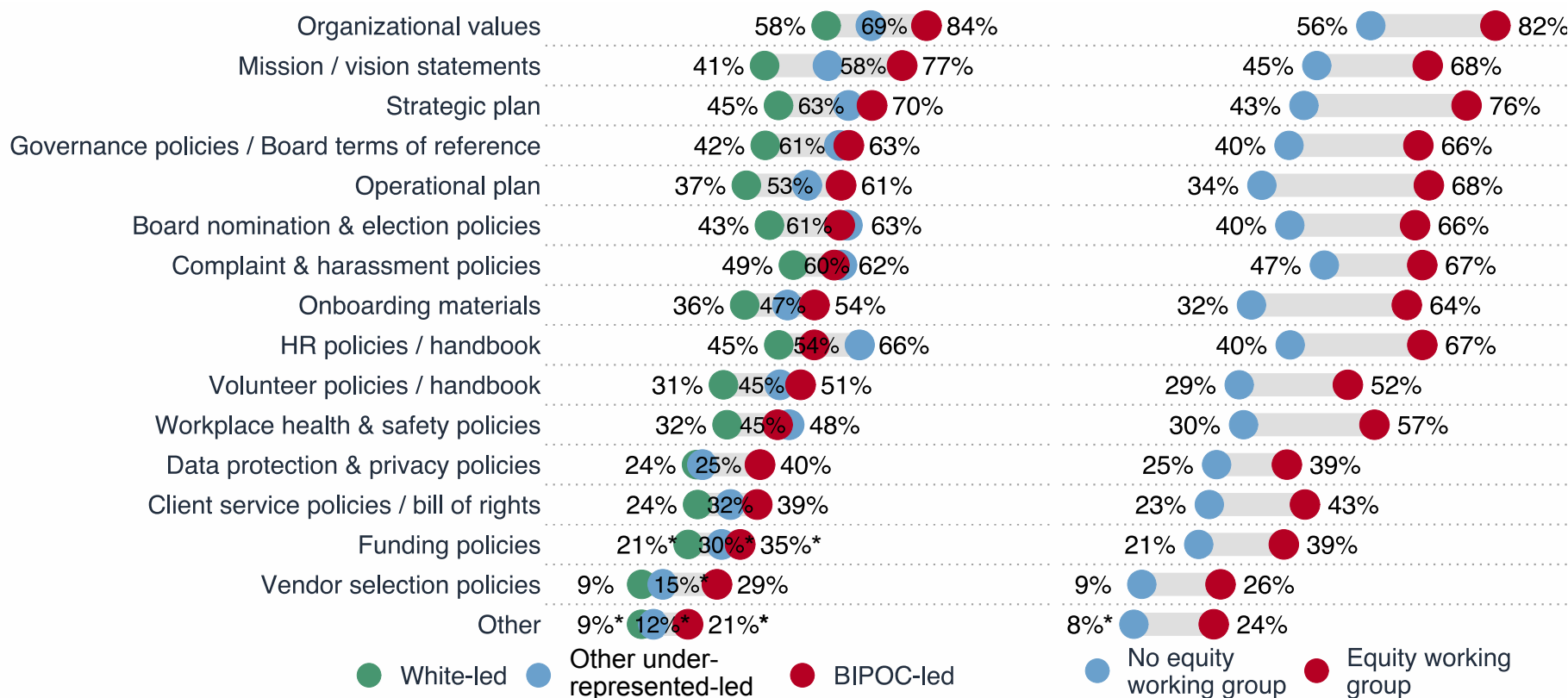
% organizations



Minority-led organizations and organizations with equity working groups are more likely to have policies and procedures referencing EDI.

Is equity, diversity and inclusion specifically highlighted in each of the following?

% organizations by leadership / existence of an equity working group



White-led organizations are less likely than minority-led organizations to have all types of policies and procedures that reference EDI.

BIPOC-led organizations tend to be even more likely than organizations led by those from other under-represented backgrounds to have such policies and procedures. HR policies are the major exception to this trend.

Organizations with equity working groups are substantially more likely to have all types of policies referencing EDI.

* use with caution

Human resources

Organizations depend on their volunteers and paid staff. Treating them in fair and equitable ways that respect their individual circumstances is central to good equity practice. To help understand current norms among charities and nonprofits, the survey gathered information about paid staff and volunteer recruitment, retention and development practices.

To assess the extent to which organizations are focussing on the equity dimensions of human resources, organizations were asked whether they track the personal characteristics of staff and volunteers and whether they are measuring the impact of their equity efforts over time. To gauge the current state of practice in the nonprofit sector, organizations were asked whether they engage in any of over three dozen specific human resources

practices identified in a literature review as enhancing equity within organizations.

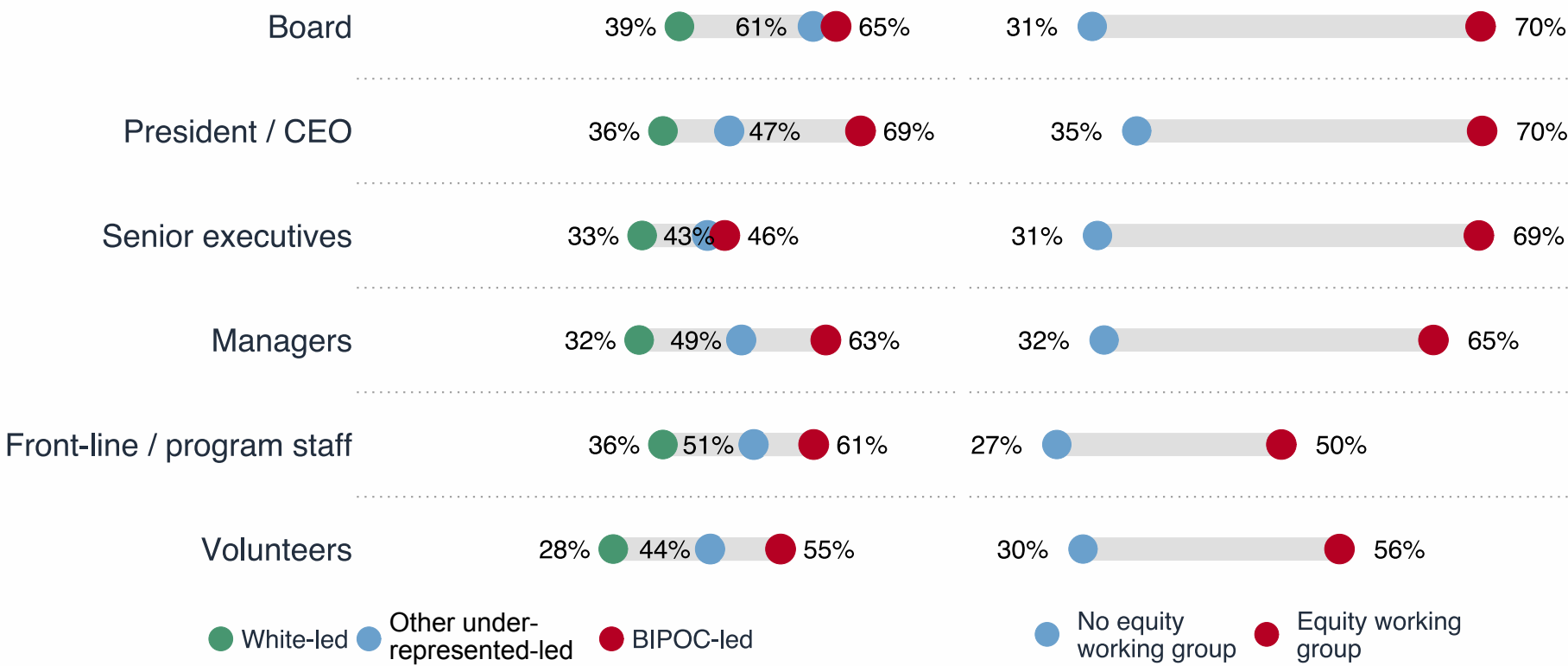
Broadly, survey results indicate that the vast majority of organizations are engaging in equity-enhancing practices, though they are less likely to be tracking the effectiveness of these measures over time. Regardless of the specific dimension of human resources being examined, larger organizations, organizations with non-white leadership and organizations with equity working groups are more likely to be more engaged in equity-enhancing practices.



Minority-led organizations and organizations with equity working groups are markedly more likely to track the characteristics of board, staff and volunteers.

Does your organization track the equity characteristics (e.g., gender, race, immigration status, etc.) of the following groups?

% organizations by leadership / existence of an equity working group

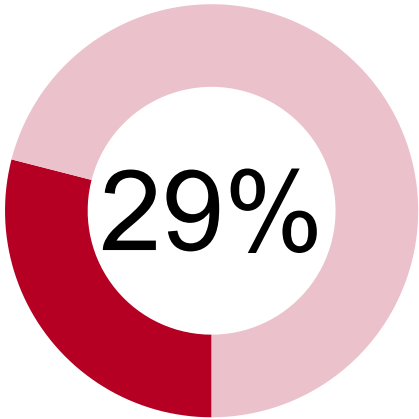


BIPOC-led organizations are most likely and white-led organizations least likely to track the equity characteristics of staff and volunteers. The differences were particularly large with the President/CEO and managers. The relatively small differences with senior executives may be driven by the relatively small number of minority-led organizations of a size to have such leaders.

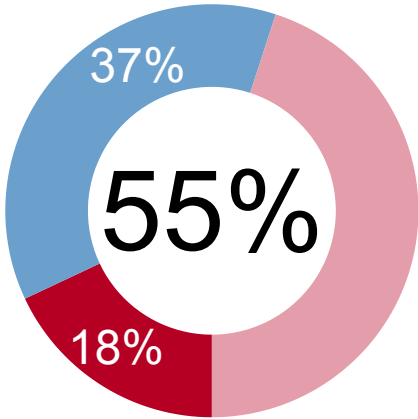
Organizations with equity working groups are roughly twice as likely to track the equity characteristics of staff and volunteers. This is particularly true for more senior positions.

Comparatively few organizations regularly review their human resources practices against the equity characteristics of paid staff and volunteers.

% of organizations with paid staff / operational volunteers

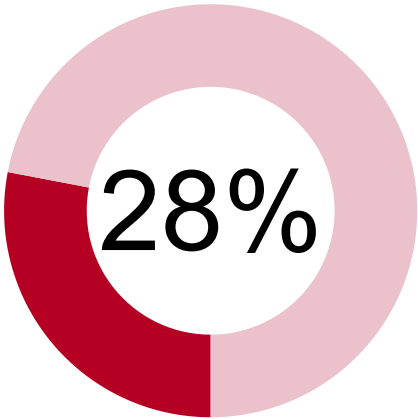


Does your organization regularly assess paid staff recruitment efforts by equity characteristics?



● All aspects ● Some aspects

Does your organization regularly assess paid staff retention, compensation, development and/or performance management efforts by equity characteristics?

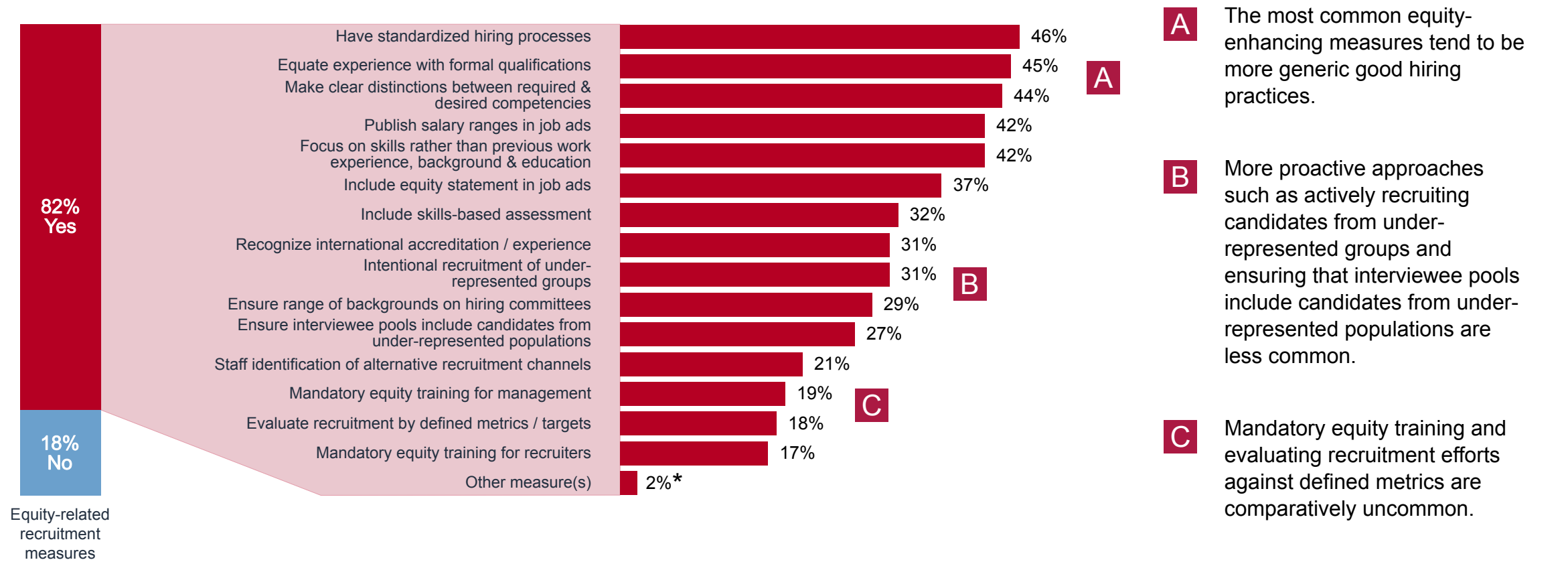


Does your organization regularly assess volunteer recruitment and retention efforts by equity characteristics?

Overall, organizations were most likely to engage in practices that are more good hiring practices than proactive equity-seeking measures.

Does your organization do any of the following to make recruitment more equitable?

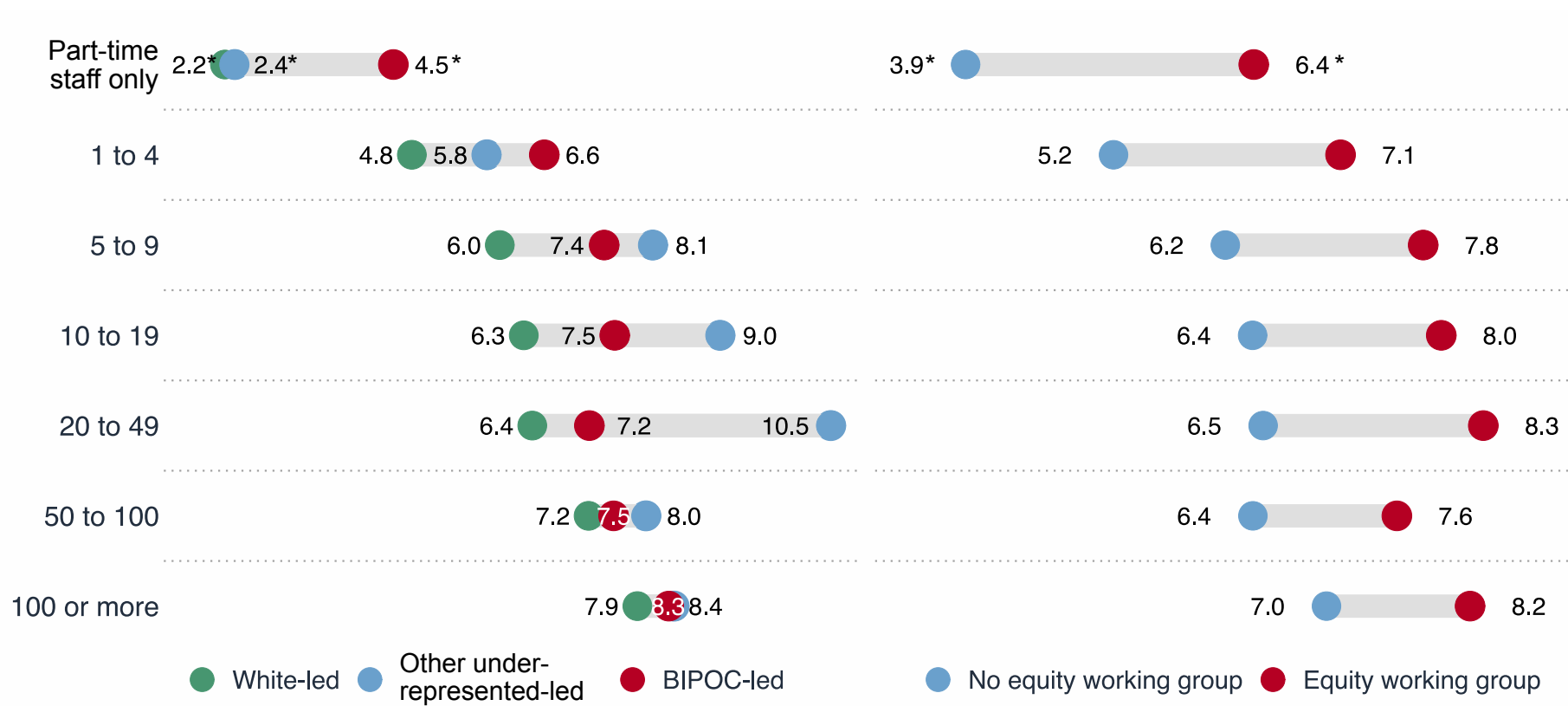
% of organizations with paid staff



Generally, larger organizations tend to take more measures than smaller organizations, as do minority-led organizations and those with equity working groups.

Does your organization do any of the following to make recruitment more equitable?

Average # measures by full-time paid staff size and leadership / existence of an equity working group (organizations with paid staff only)



Across all size categories, white-led organizations tend to engage in fewer equity-enhancing recruitment practices. BIPOC-led organizations lead amongst the smallest organizations, but trail organizations led by leaders from other under-represented backgrounds when staff size increases.

Organizations with equity working groups tend to engage in more equity supporting practices.

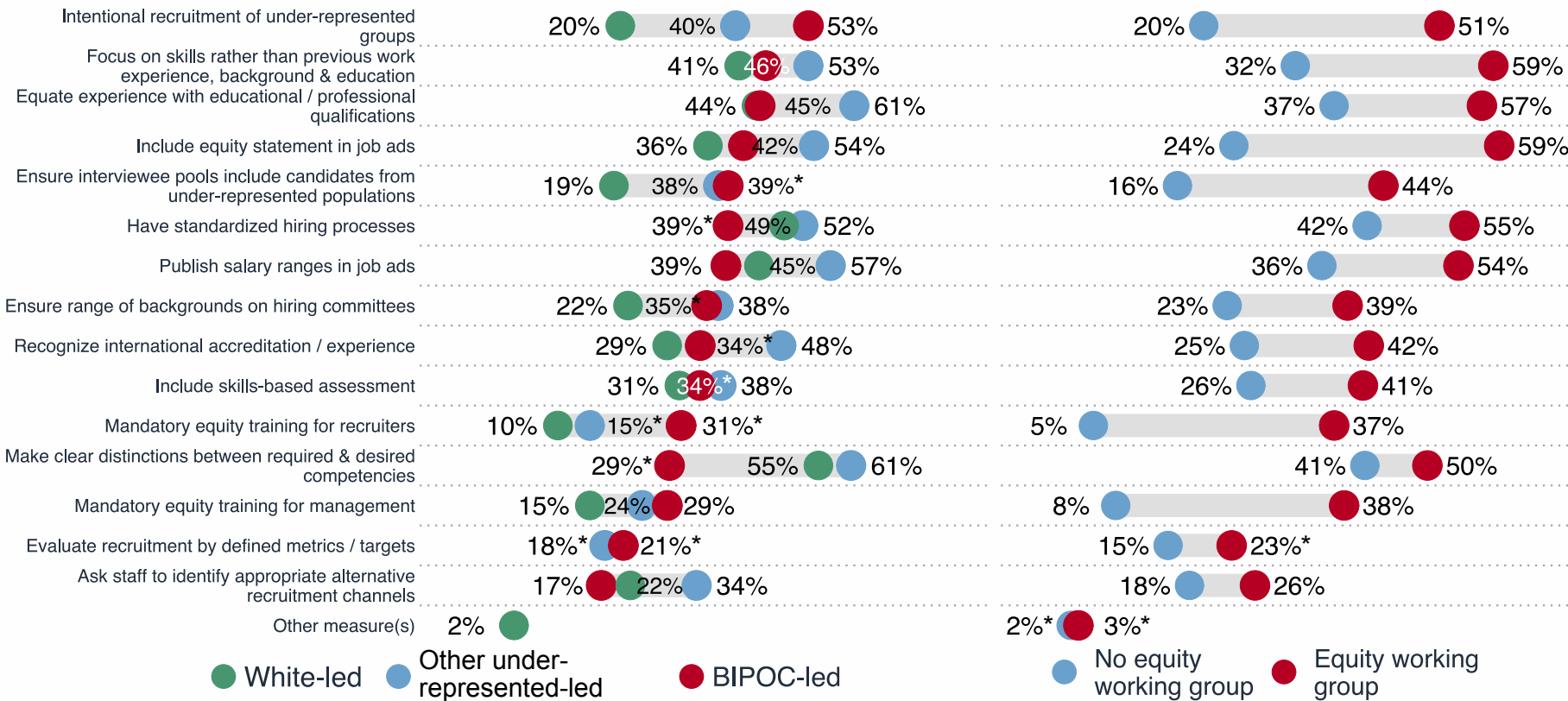
The differences between groups tend to narrow as paid staff size increases.

* use with caution

While organizations with equity working groups are more likely to take all measures, BIPOC-led organizations frequently trail other under-represented-led organizations.

Does your organization do any of the following to make compensation / development / performance management more equitable?

% of organizations with paid staff by leadership / existence of an equity working group



White-led organizations tend to trail minority-led organizations most with more proactive approaches like ensuring that interviewee pools include candidates from under-represented populations and mandatory equity training.

BIPOC-led organizations tend to lag in measures that correlate with developed human resources infrastructure. This likely correlates to their generally smaller size.

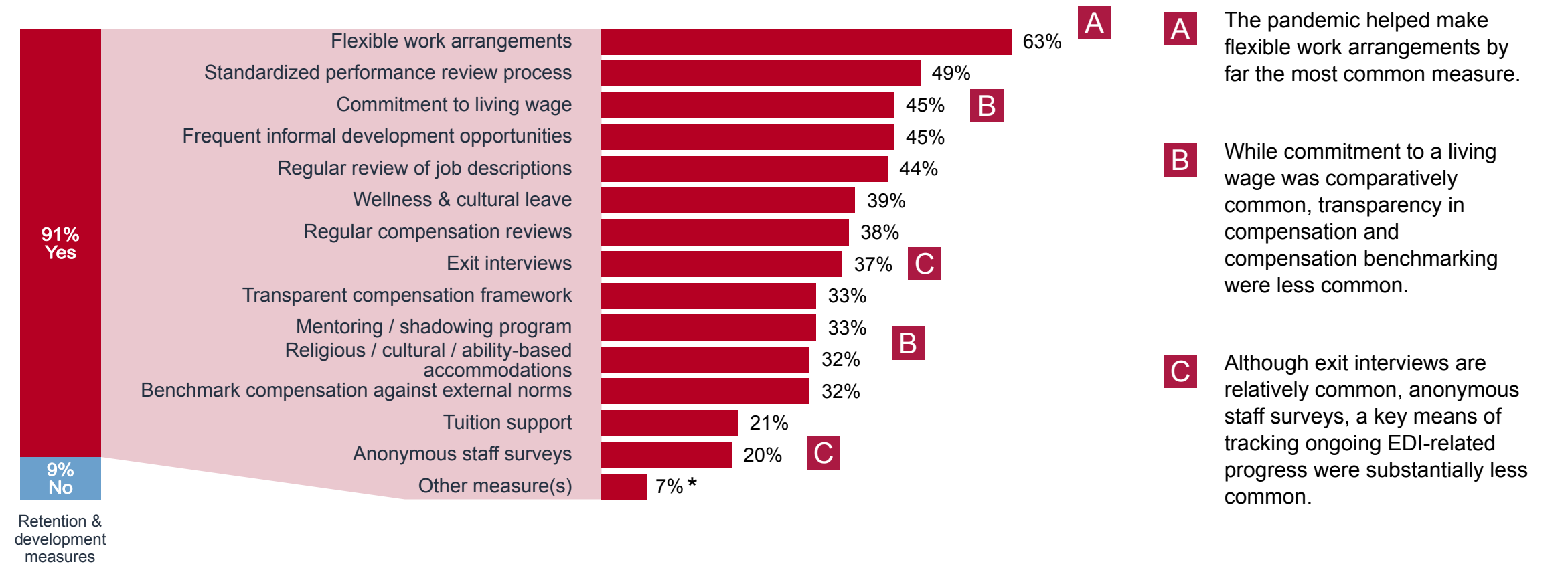
Organizations with equity working groups were markedly more likely to require mandatory training, include equity statements in job ads, and embrace more proactive approaches.

* use with caution

Overall, organizations are modestly more likely to engage in retention-related measures; again, measures reflective of general good practice are most common.

Does your organization do / offer any of the following to make compensation, development and performance management more equitable?

% of organizations with paid staff

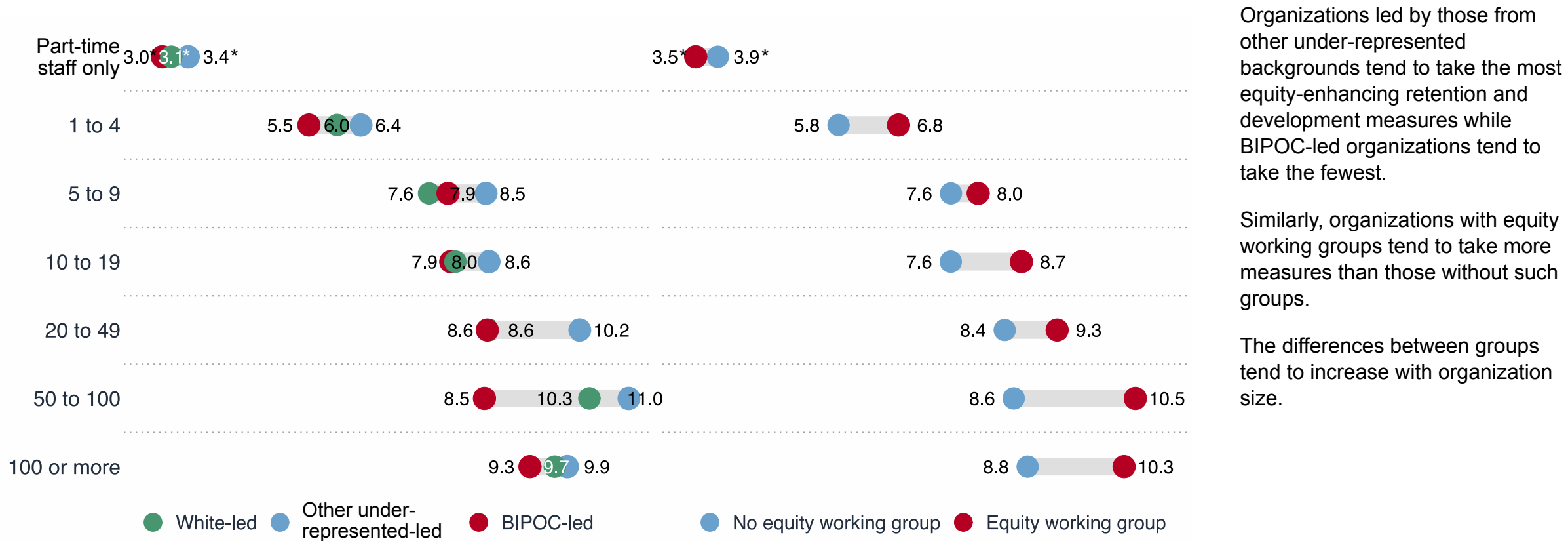


* use with caution

Larger organizations tend to engage in more measures. Broadly speaking, the presence of an equity working group tends to have a greater impact than minority leadership.

Does your organization do / offer any of the following to make compensation, development and performance management more equitable?

Average # measures by full-time paid staff size and leadership / existence of an equity working group (organizations with paid staff only)

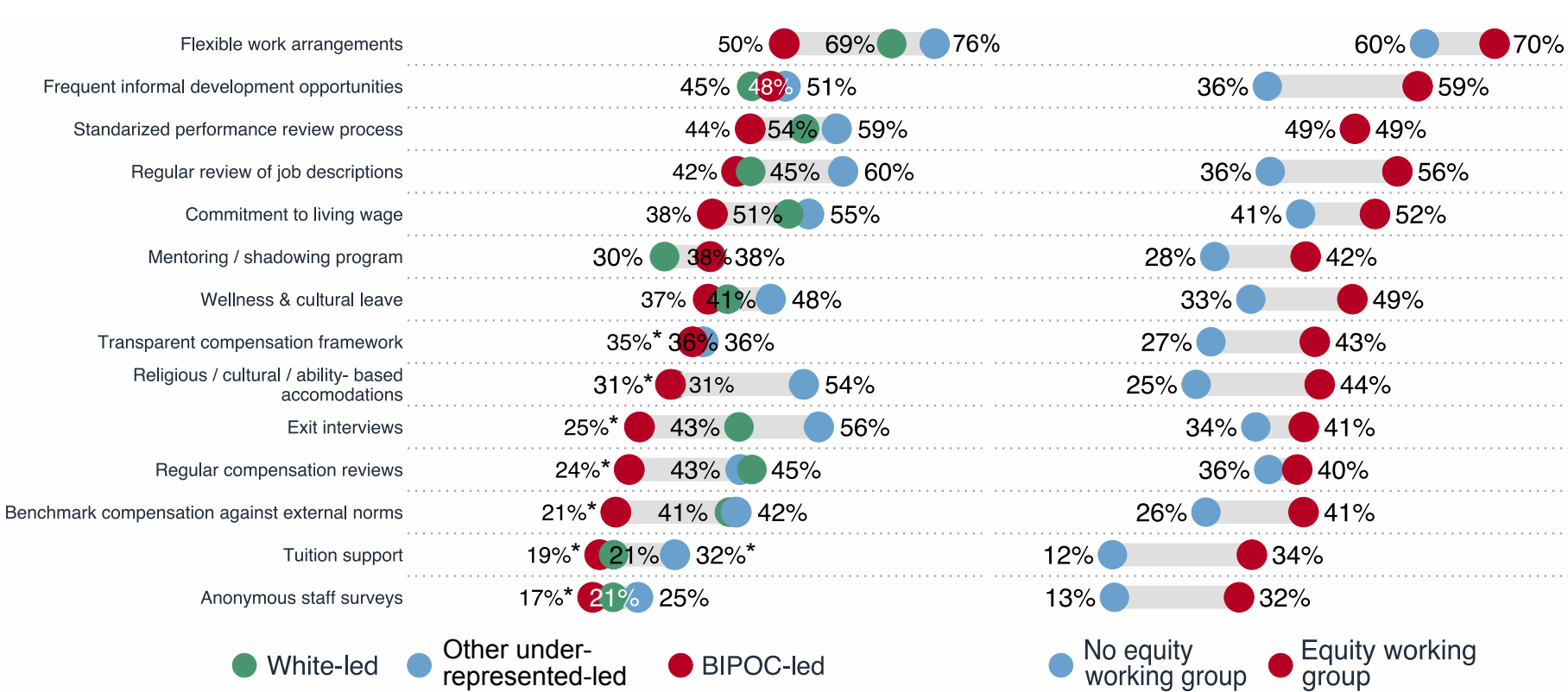


* use with caution

Many retention-related measures appear to be associated with organization size and resources, with BIPOC-led organizations facing greater challenges.

Does your organization do / offer any of the following to make compensation, development and performance management more equitable?

% of organizations with paid staff by leadership / existence of an equity working group



BIPOC-led organizations are less likely than other organizations to engage in most retention and development measures. While some of this is likely related to organizational size, the size of the differences suggests BIPOC-led organizations face particular challenges.

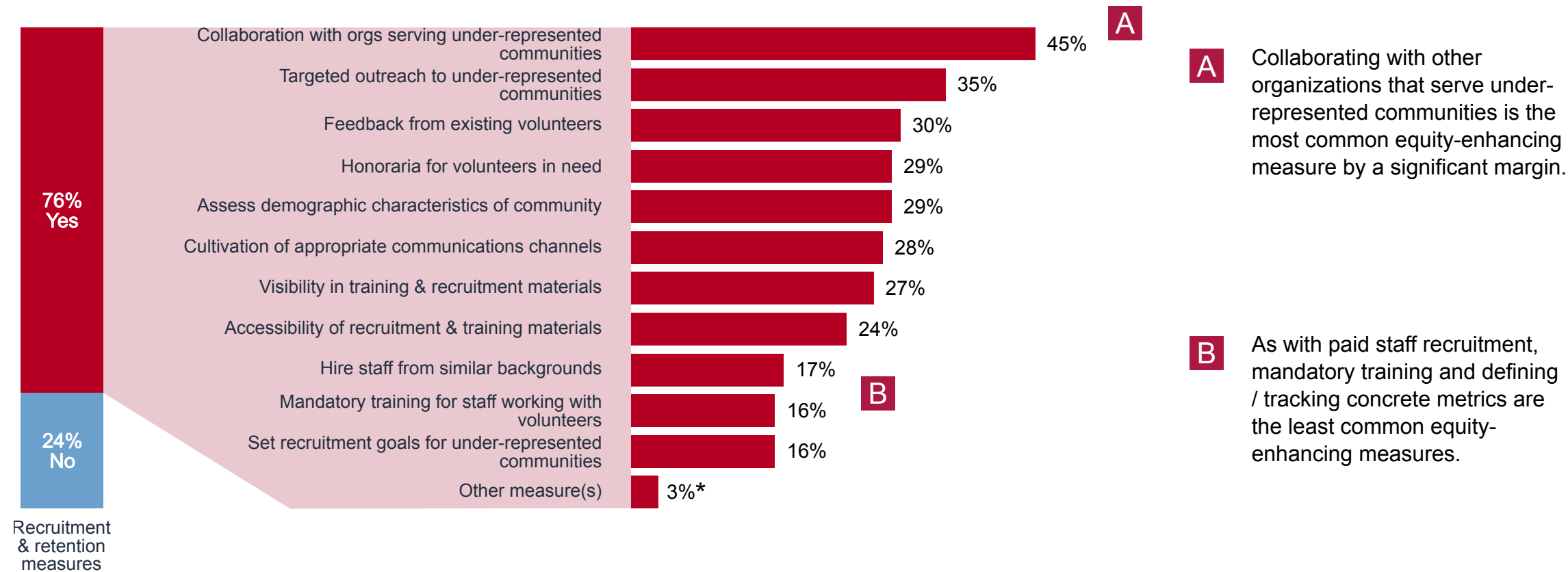
Organizations with equity working groups are more likely to engage in all measures, particularly the least common ones.

* use with caution

Organizations are somewhat less likely to take measures aimed at recruiting and retaining diverse volunteers.

Does your organization do any of the following to help recruit and retain volunteers from under-represented communities?

% of organizations with volunteers in operational roles

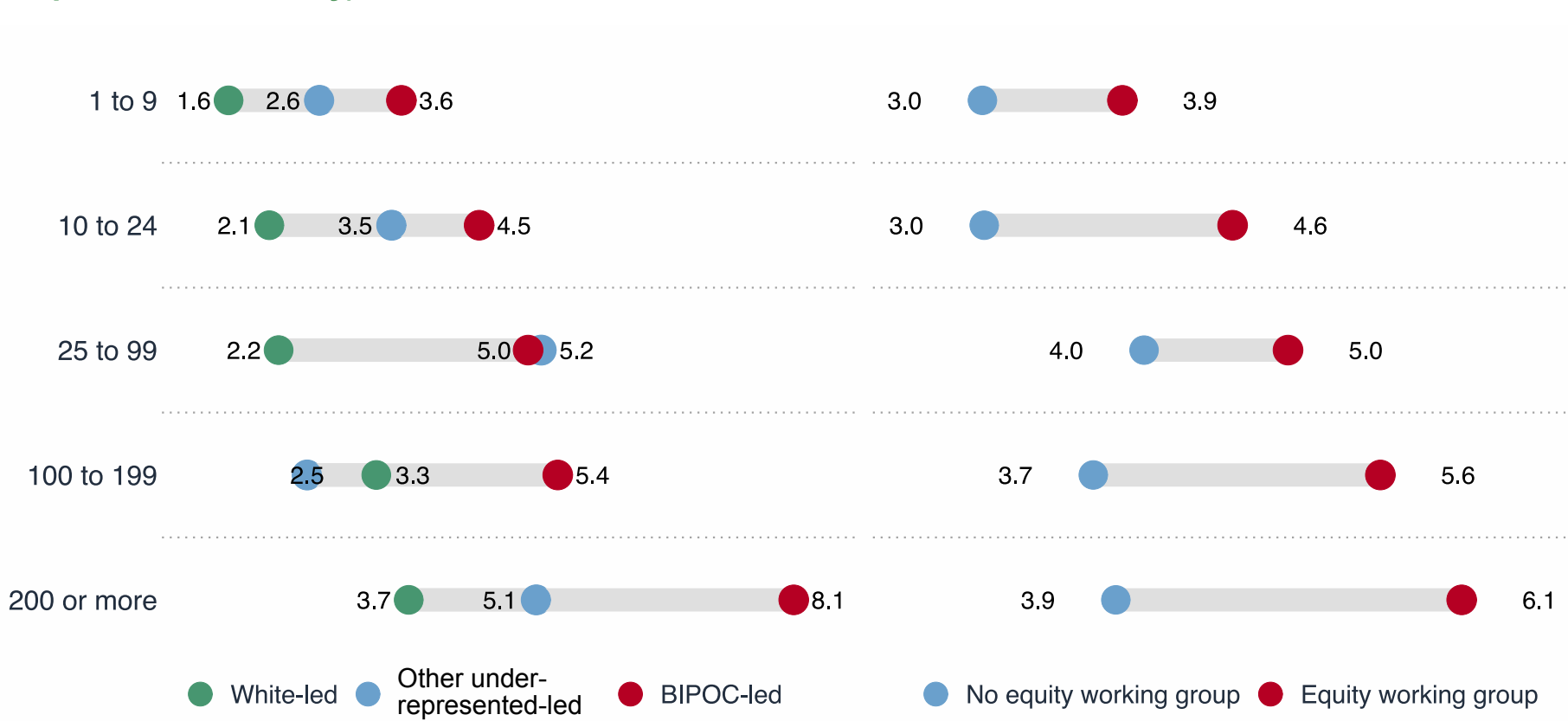


* use with caution

The number of measures organizations use tends to increase with the size of the volunteer pool, minority leadership and the presence of equity working groups.

Does your organization do any of the following to help recruit and retain volunteers from under-represented communities?

Average # measures by number of operational volunteers and leadership / existence of an equity working group (organizations with volunteers in operational roles only)



In contrast to the situation with paid staff-related measures, BIPOC-led organizations tend to engage in more volunteer-related equity enhancing measures than other organizations, particularly white-led ones.

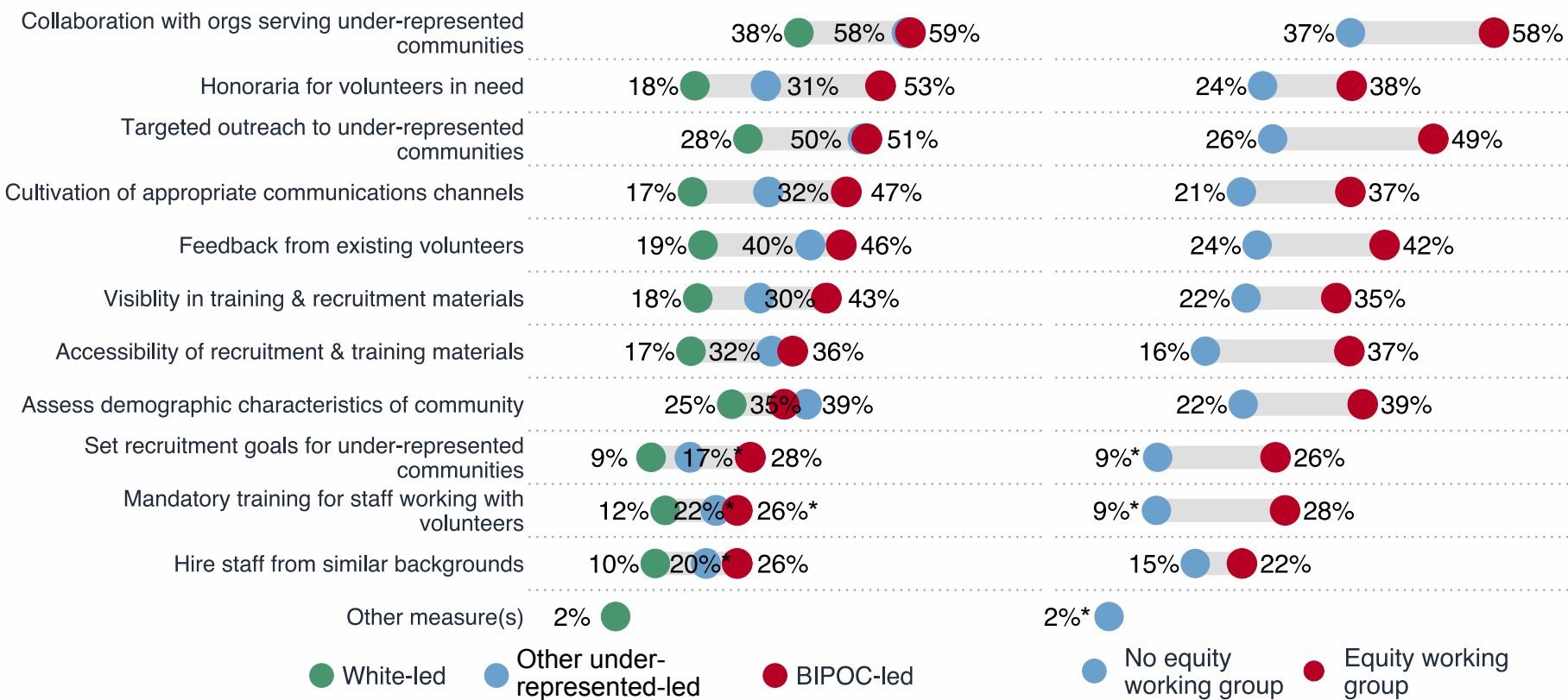
Organizations with equity working groups tended to engage in more equity-enhancing measures.

The size of the differences between groups is also larger than with paid staff measures.

BIPOC-led organizations are particularly likely to take measures to help recruit and retain volunteers from under-represented communities.

Does your organization do any of the following to help recruit and retain volunteers from under-represented communities?

% of organizations with volunteers in operational roles by leadership / existence of an equity working group



BIPOC-led organizations are more likely to engage in most equity-enhancing measures than other organizations.

- They are particularly more likely to:
- provide honoraria for volunteers in need,
 - cultivate particular communications channels,
 - set recruitment goals,
 - hire staff from similar backgrounds, and
 - require mandatory training.

Organizations with equity working groups are more likely to engage in all equity-enhancing measures.

* use with caution

Collection and use of equity-related information

The degree to which organizations seek to understand the equity characteristics of the people they serve and apply this knowledge in decision making is a key measure of the state of equity practices among nonprofits and charities.

To help understand what organizations are currently doing, respondents were asked whether their organization gathers each of 15 different types of equity-related information about the people they serve, either directly from those served or indirectly from other sources. Organizations that indicated they gather equity information were then asked how they obtained this information and whether they use it in any of 18 different organizational activities and processes.

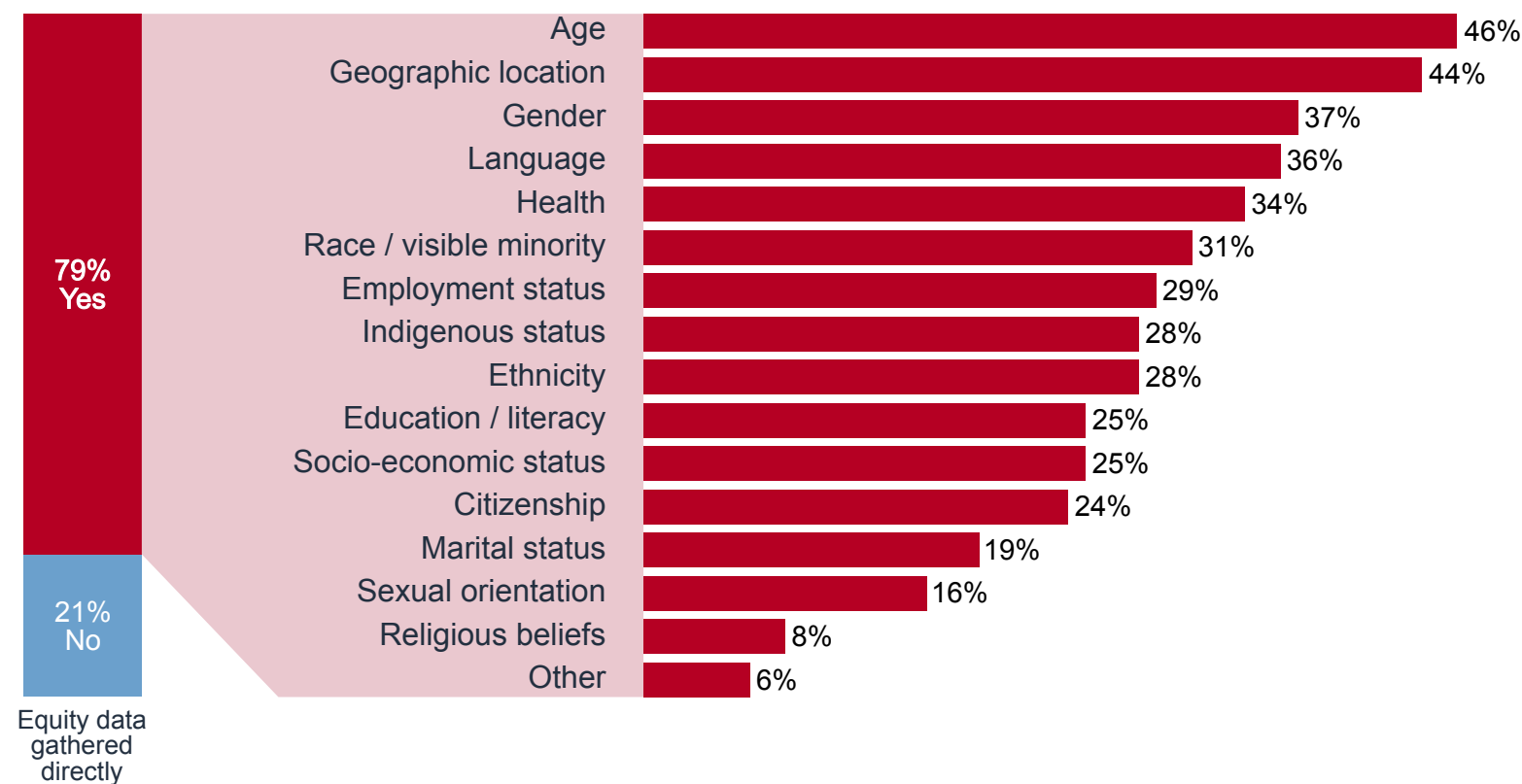
Overall, the results indicate that while most organizations are gathering equity-related information, the application to decision-making is quite uneven. While the most common applications of equity-related information focus on program delivery and high level organizational functions, fully two in five organizations gathering equity-related information do not use it. Organizations with equity working groups are substantially more likely to gather equity-related information and make heavier use of it. Organizations with non-white leadership consistently make heavier use of equity-related information though they are not necessarily more likely to gather some types of it.



Most organizations are gathering equity-related information about those they serve.

Does your organization collect / gather any of the following equity-related information about the people it serves / benefits?

% of organizations serving people directly



Overall, just under four in five organizations are gathering some sort of equity data about the people they serve or benefit.

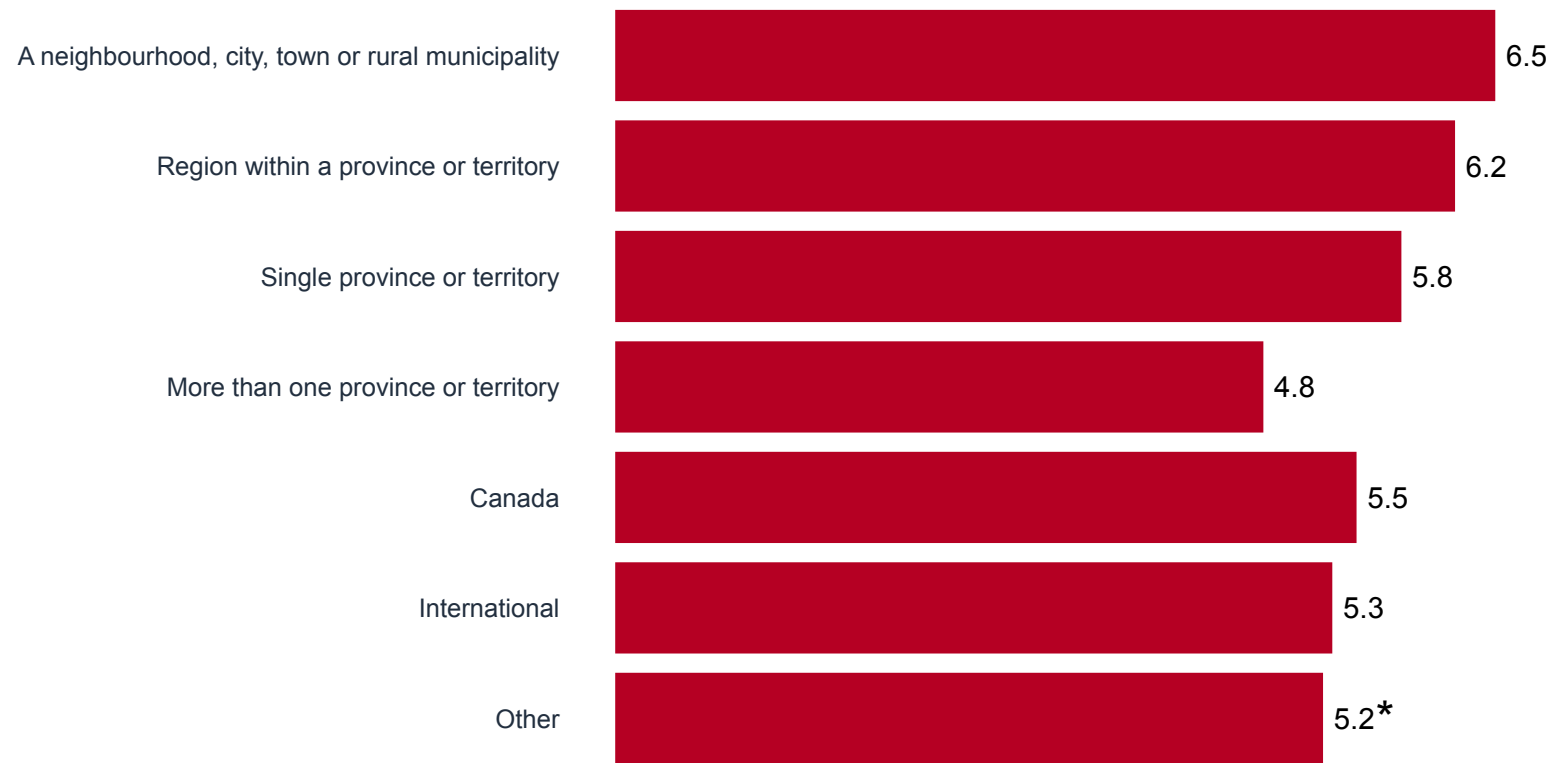
They are more likely to gather information related to age, location and gender than about race or ethnicity.

They are least likely to gather information about the religious beliefs, sexual orientation and marital status of those they serve.

Organizations with a more local focus tend to gather more equity-related information about those they serve.

Does your organization collect / gather any of the following equity-related information about the people it serves / benefits?

Average # of types of data gathered by geographic focus of organization (organizations serving people directly)

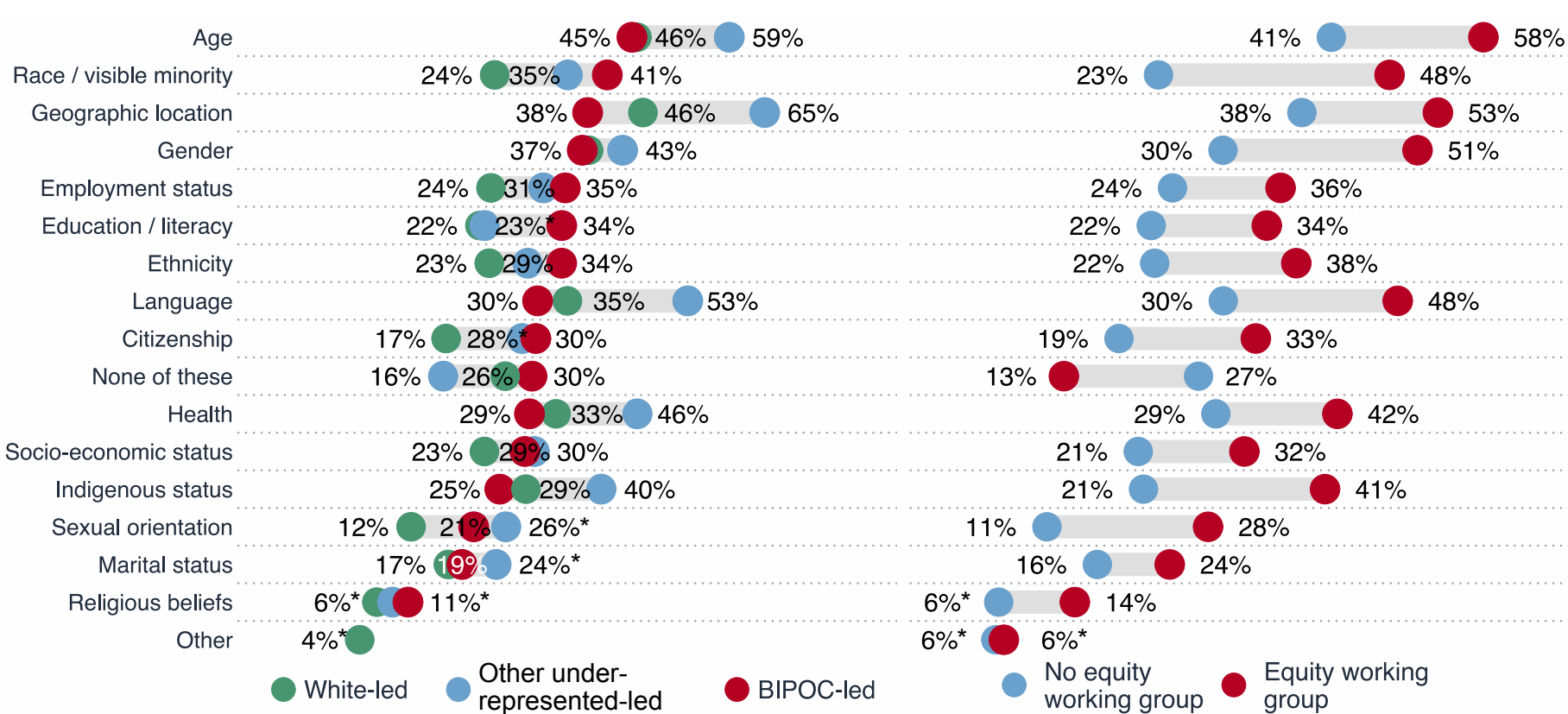


* use with caution

Organizations with equity working groups are more likely to gather equity-related information; a few key types stand out for other under-represented-led organizations.

Does your organization collect / gather any of the following equity-related information about the people it serves / benefits?

% of organizations serving people directly by leadership / existence of an equity working group



The equity-related information organizations gather is significantly affected by the populations they serve.

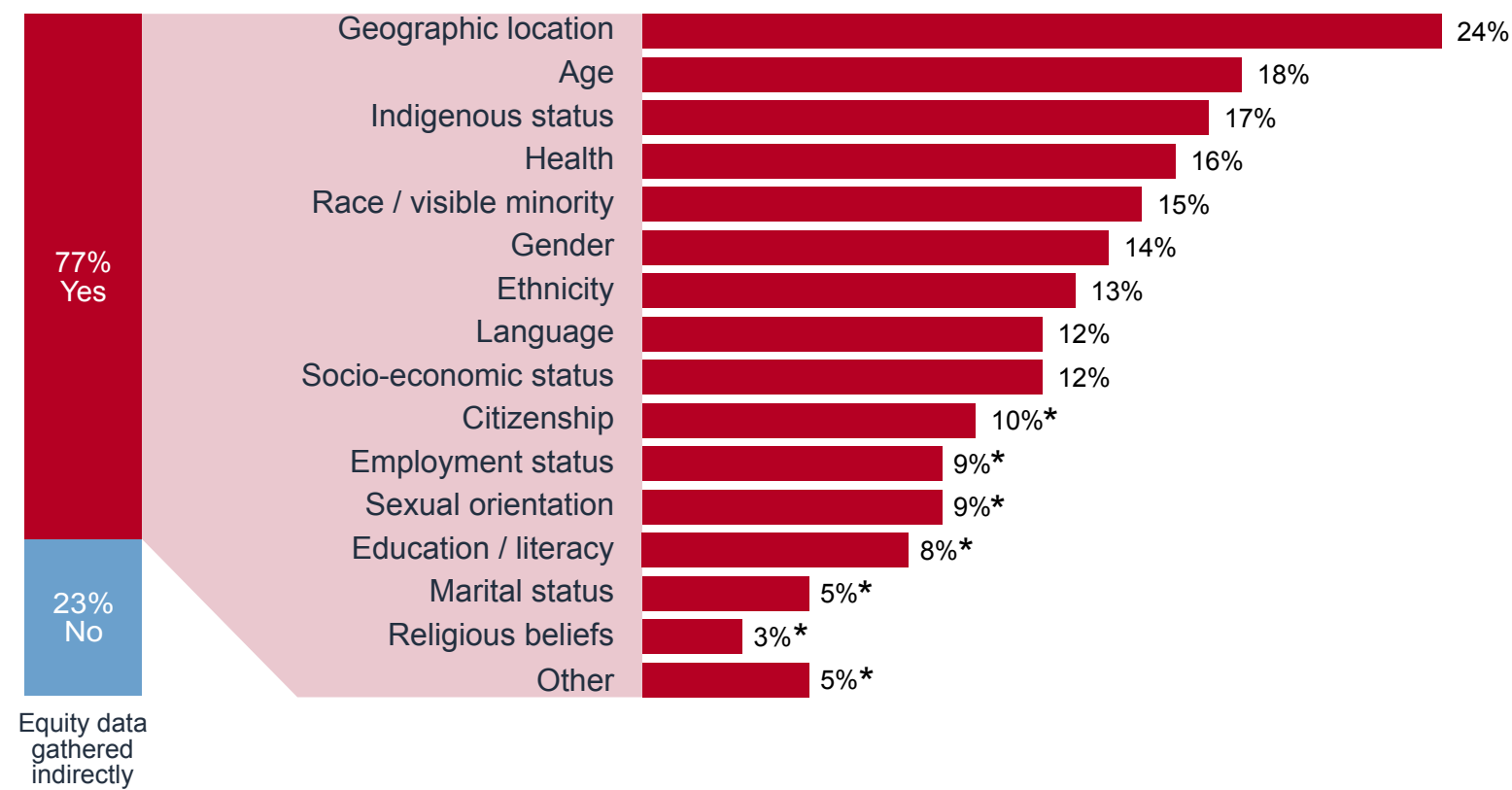
Minority-led organizations are more likely to gather most types of equity related information. Race, employment status, ethnicity and citizenship are particularly associated with BIPOC leadership while age, geographic location, language, health, Indigenous status and sexual orientation are particularly associated with leadership from other under-represented backgrounds.

* use with caution

Organizations that work indirectly are less likely to require the collection of equity-related information about those their partners serve.

Does your organization require the organizations it funds and/or supports to collect / gather any of the following equity-related information about the people they serve / benefit?

% of organizations working through / with other organizations to support beneficiaries



Overall, organizations working indirectly are much less likely to require the organizations they support to gather any individual type of information than organizations are to gather it themselves, but about as likely to require them to gather something.

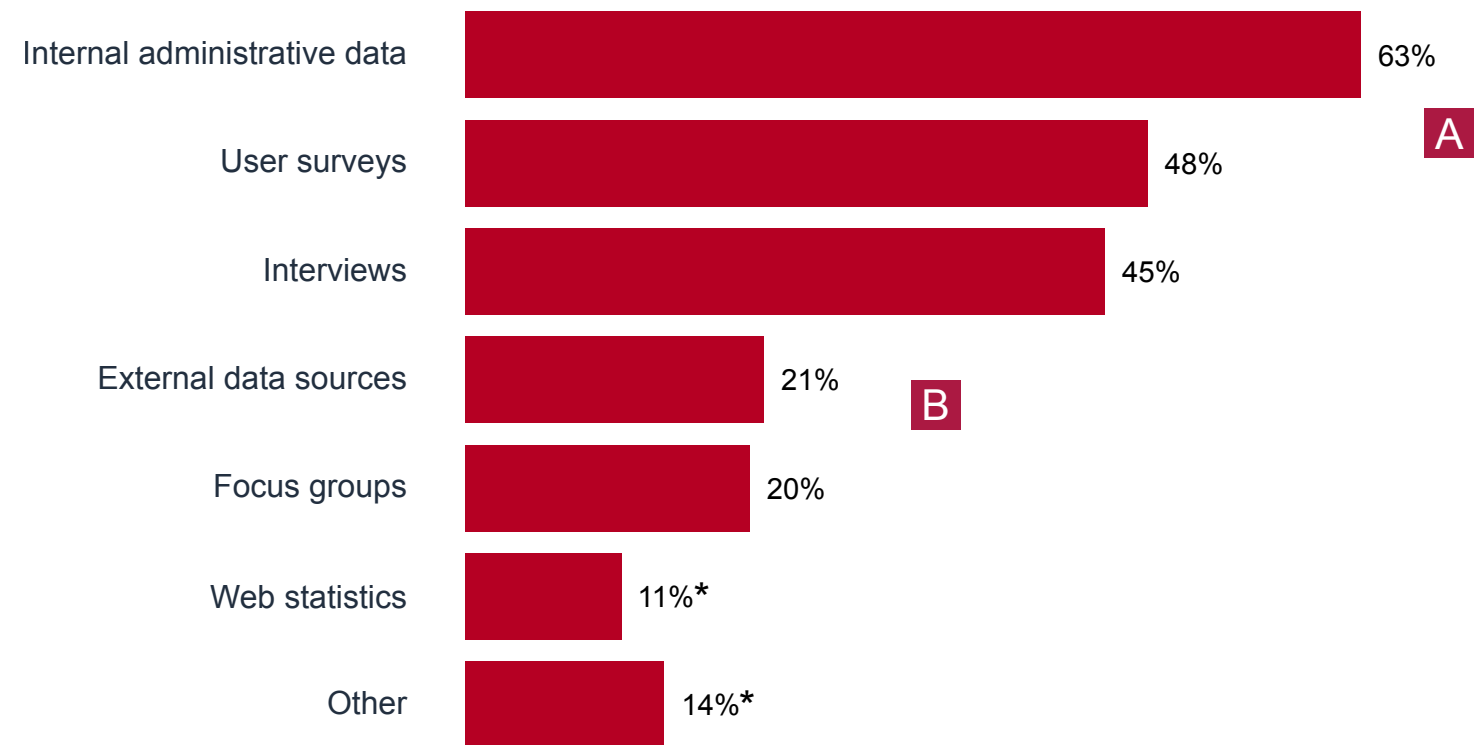
Judging by differences in the relative ranking of specific information types, organizations working indirectly seem to place higher importance on ensuring the organizations they support collect data about Indigenous status and somewhat lower importance on collecting gender, language, and employment status data.

* use with caution

Equity-related information is predominantly collected internally.

How is this equity-related information collected / gathered?

% of organizations that directly collect equity-related information



A Organizations are most likely to collect equity-related information from administrative data, surveys and interviews of those served.

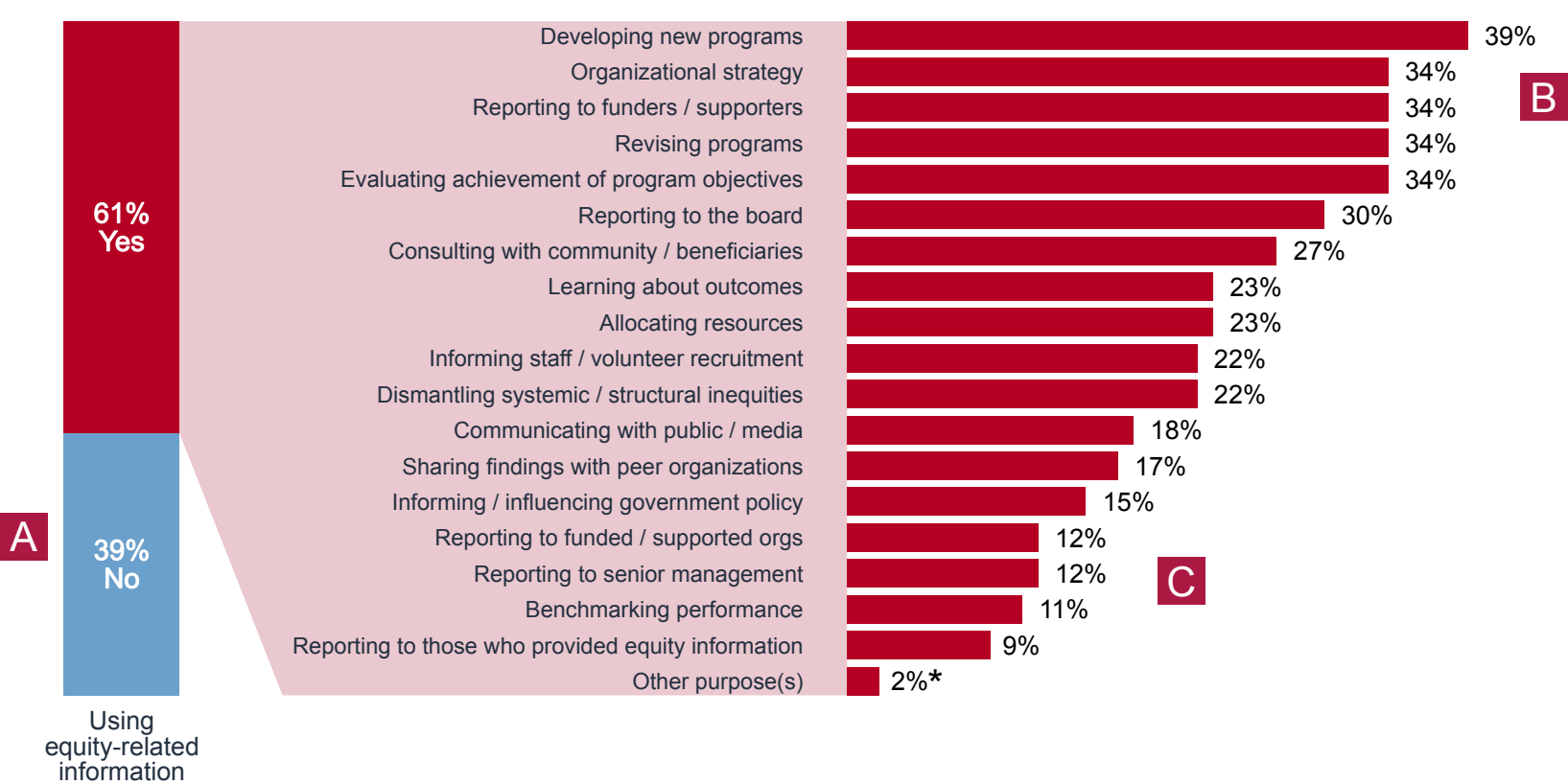
B They are less likely to draw on external data sources (e.g., Statistics Canada) and focus groups.

* use with caution

Organizations gathering equity-related information use it for many purposes (6.0 on average) though a significant minority don't use it at all.

What are the most important uses of equity-related information about those your organization serves / benefits?

% of organizations that collect equity-related information



A Incredibly, two in five organizations collecting equity-related information do not use it. By extension, this means that only about half of organizations are using equity-related information.

B The most common uses of equity-related information are related to programming and high-level organizational management functions.

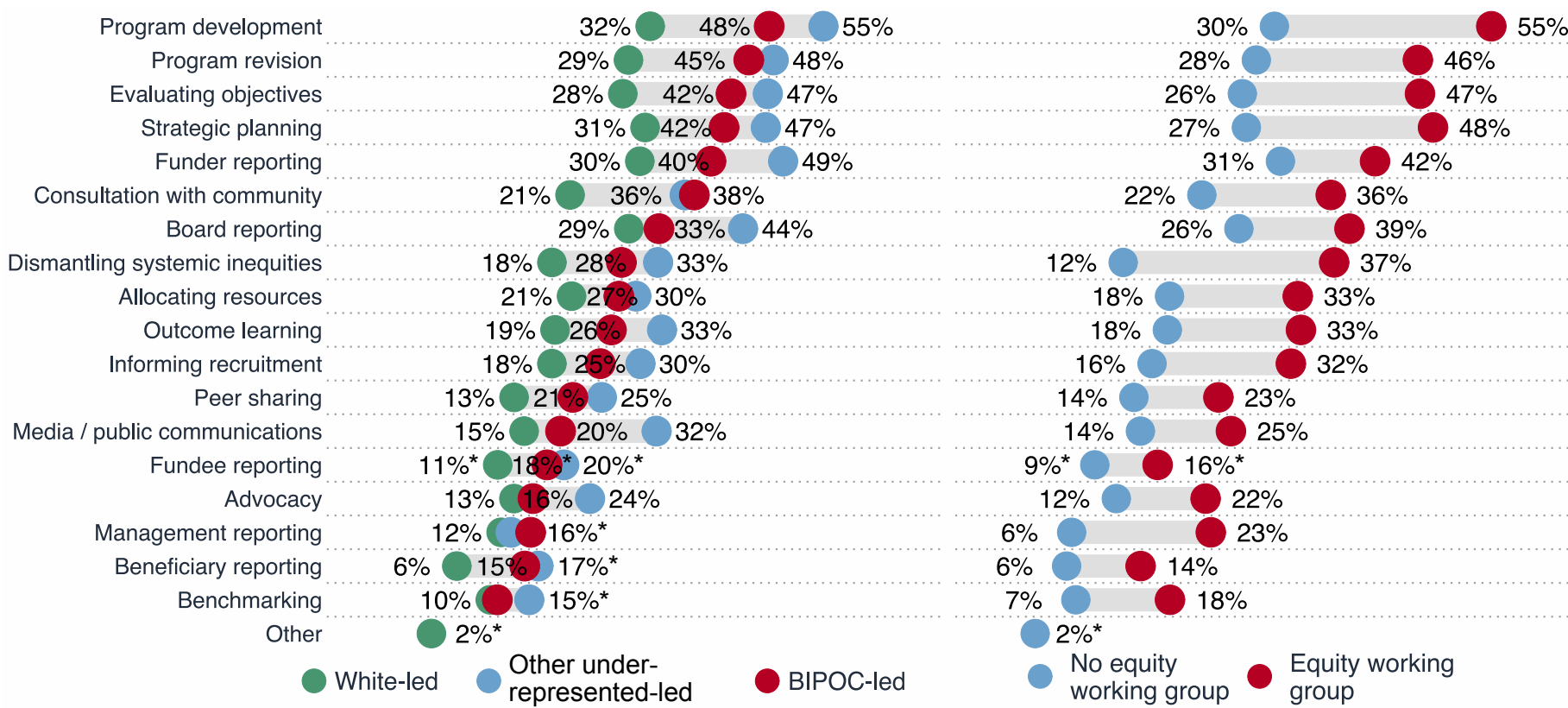
C Organizations are less likely to use equity-related information in more narrowly focused operational ways or for reporting to those they serve.

* use with caution

Minority-led organizations and organizations with equity working groups are more likely to use equity-related information in virtually every way.

What are the most important uses of equity-related information about those your organization serves / benefits?

% of organizations that collect equity-related information by leadership / existence of an equity working group



Organizations led by those from other under-represented backgrounds are most likely to use equity-related information in virtually all ways.

The tendency for BIPOC-led organizations to lag organizations led by those from other under-represented backgrounds is likely related to the generally smaller organizations BIPOC leaders represent.

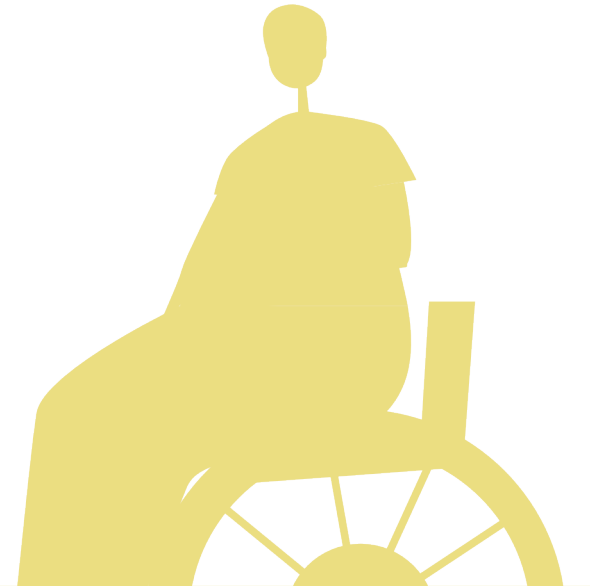
* use with caution

Populations served

To better understand the operational contexts in which EDI practices exist, respondents were asked whether their organization had programs or services specifically focused on particular communities. In this context, specifically focused was defined as activities designed for a particular community or where a large portion of the beneficiaries came from a particular community. Respondents were able to choose up to ten specific communities from a list of two dozen.

Survey results show that organizations have programs serving an incredible range of groups. Three quarters of organizations served more than one group, with the average hovering around five. Most commonly organizations have programs

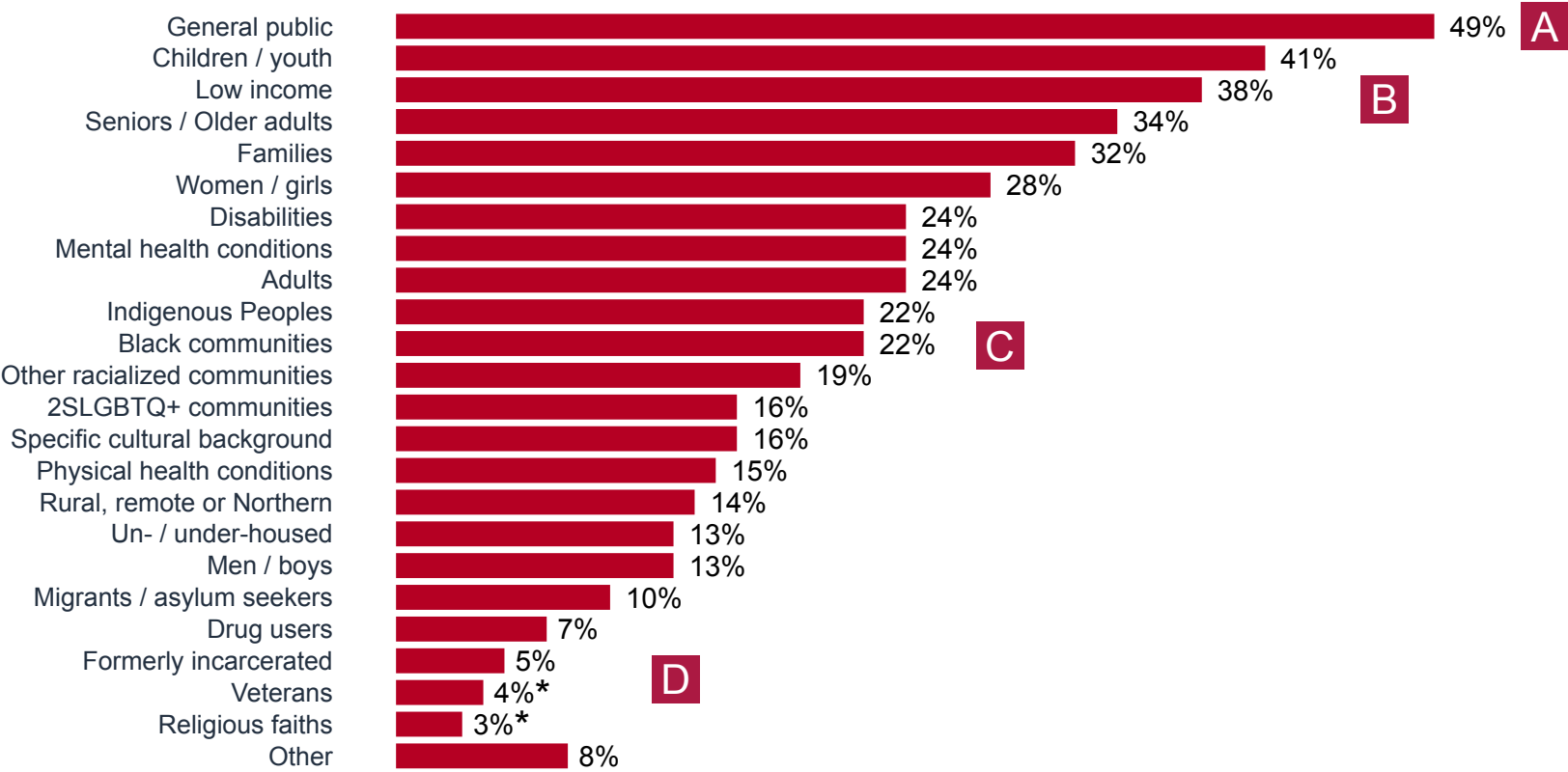
serving the general public and a number of other groups. Results also show strong associations between the populations served and the background of organizational leadership.



Organizations have programs and services intended for a very wide range of audiences.

Does your organization have any programs or services specifically focused on particular communities? By specifically focused, we mean either activities that are designed for a particular community or where a large portion of the beneficiaries come from that community.

% organizations



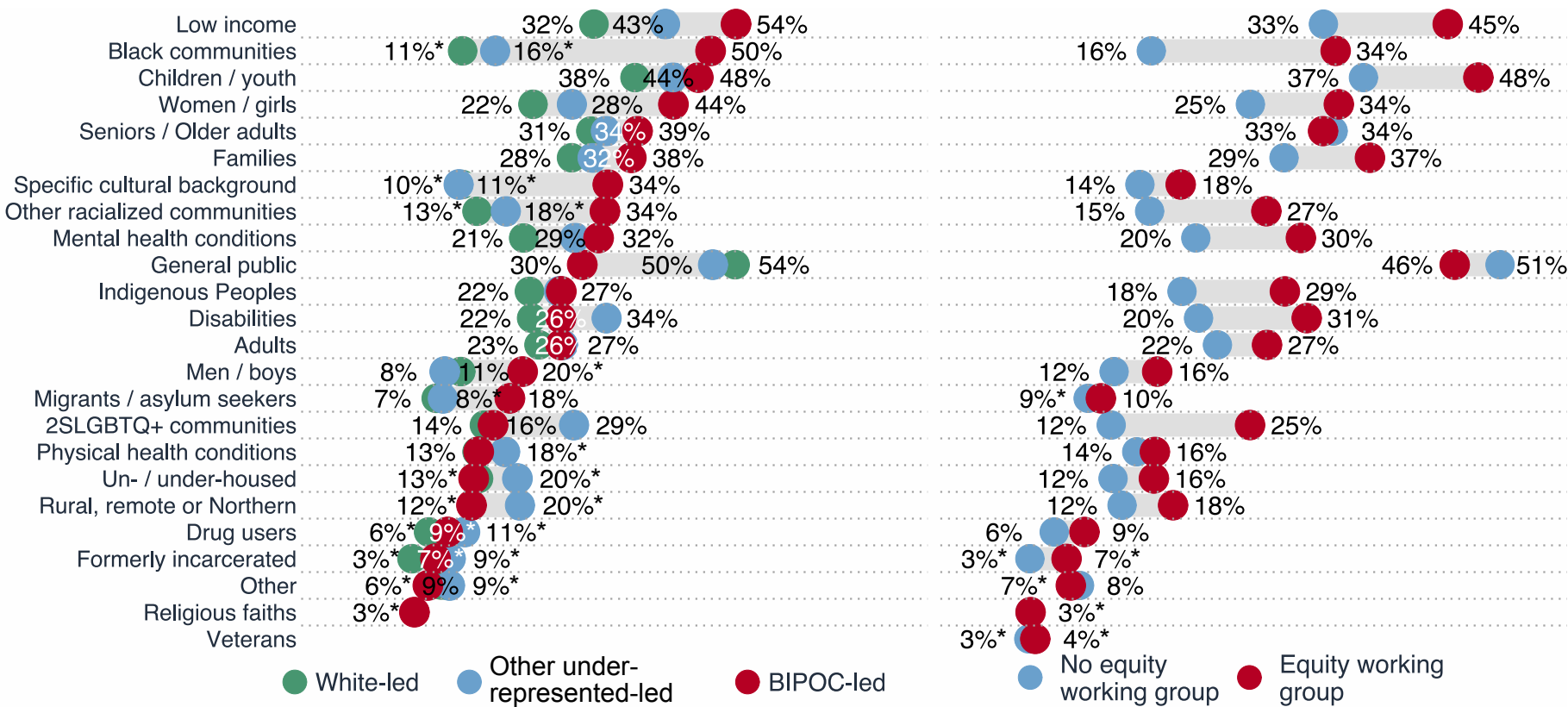
- A** Although organizations were most likely to have programs aimed at the general public, 87% of organizations had programs focusing on other communities.
- B** Programming based on age and gender is relatively common though there is a broad range (e.g., adults and men/boys).
- C** Roughly a fifth of organizations offer programs focusing on particular visible minority groups.
- D** Comparatively few organizations surveyed offer programs specifically for these groups.

* use with caution

White-led organizations are less likely to have programs and services focusing on specific groups.

Does your organization have any programs or services specifically focused on particular communities? By specifically focused, we mean either activities that are designed for a particular community or where a large portion of the beneficiaries come from that community.

% organizations by leadership / existence of an equity working group



BIPOC-led organizations are noticeably more likely to offer programming focusing on particular age-, gender-, culture- and race-based communities.

Organizations with leadership from other under-represented backgrounds are comparatively likely to offer programming to communities differentiated by most other characteristics.

Organizations with equity working groups are more likely to offer programs focusing on particular communities.

* use with caution

Enablers and barriers

The capacity of organizations to engage in EDI-related work is affected by a range of internal and external factors. To better understand what may be helping or hindering organizations in their equity-related work, respondents were asked about the degree to which 15 potential factors are enablers or barriers in their organization's efforts to apply equity, diversity and inclusion principles to its work. The range of factors covered is broad and includes the availability of resources and material supports, engagement of internal and external stakeholders, staff capacity and the broader societal context.

Survey results indicate that the biggest enablers are buy-in and engagement, both within the organization and with external parties, while the biggest barriers are access to the time and money required to do the work. Organizations are most

split on factors related to knowledge, training, skills and support from funders.

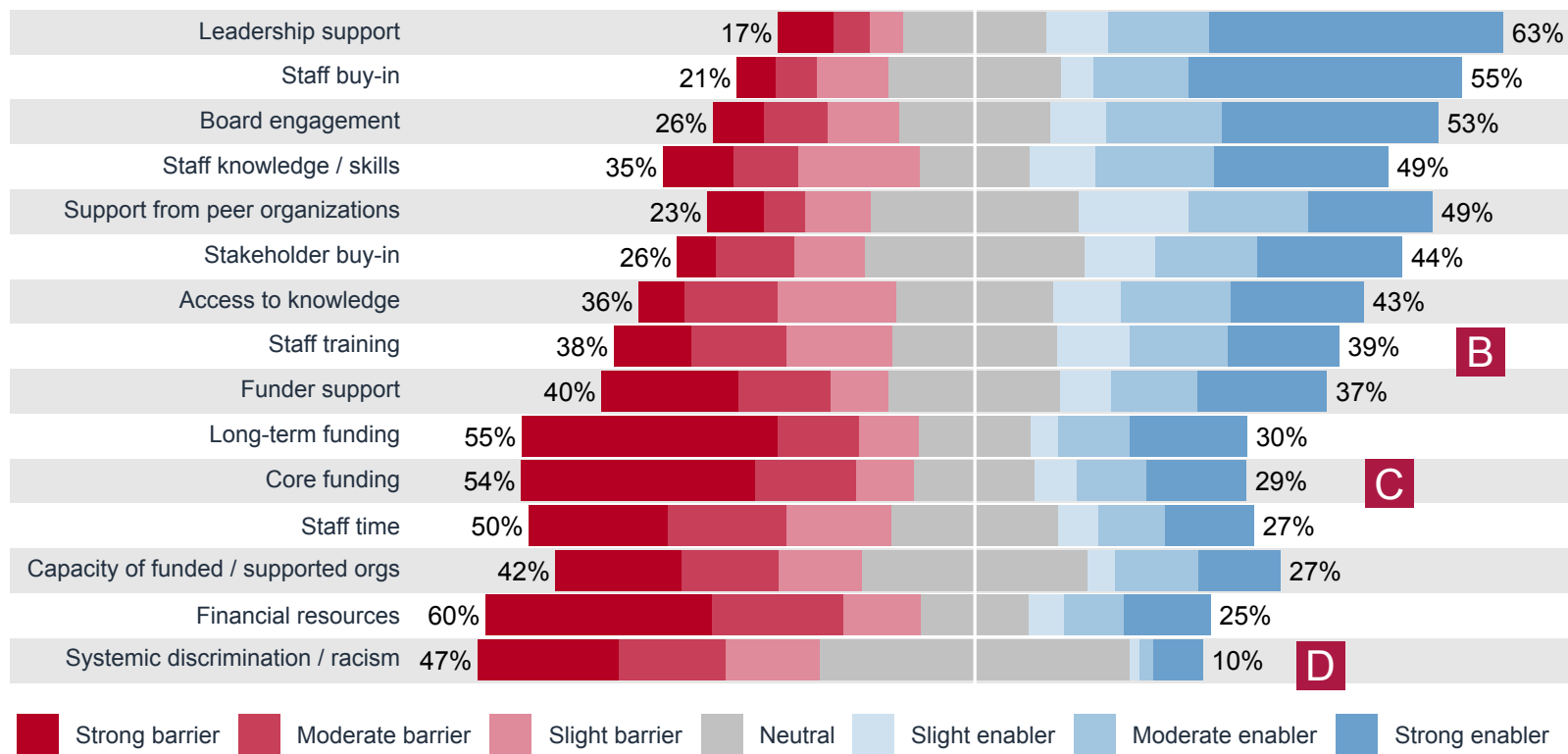
Overall, the results indicate that BIPOC-led organizations are facing greater challenges, particularly with funding and buy-in and engagement. Organizations with equity working groups are more likely to see buy-in and engagement as enablers, but also more likely to see greater challenges with funding, most likely because they are devoting more effort to these activities.



Focus and buy-in are the biggest enablers in applying equity, diversity and inclusion principles, while lack of resources and systemic discrimination are the biggest barriers.

To what extent are each of the following barriers or enablers for your organization as it seeks to apply equity, diversity and inclusion principles in its work?

% organizations

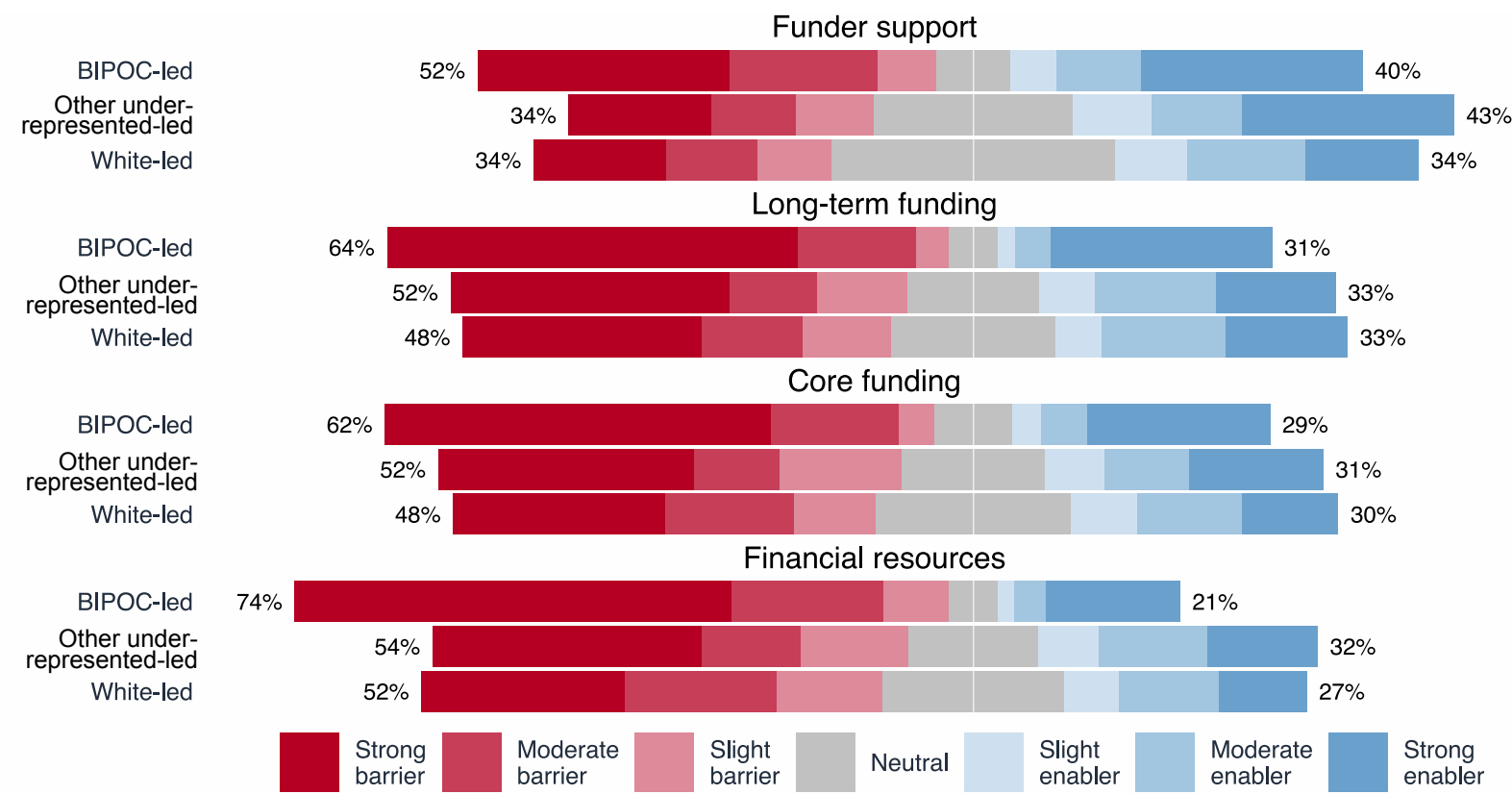


- A** Engagement of people within the organization is the biggest enabler.
- B** Organizations were more split as to whether knowledge, training, and funder support are enablers or barriers to their work.
- C** Lack of money and time are the biggest barriers to making progress on EDI issues.
- D** A significant fraction of organizations were unsure about the impact of systemic discrimination on their EDI work.

Funding and finances are greater barriers for BIPOC-led organizations as they seek to apply equity, diversity and inclusion principles in their work.

To what extent are each of the following barriers or enablers for your organization as it seeks to apply equity, diversity and inclusion principles in its work?

% organizations by leadership



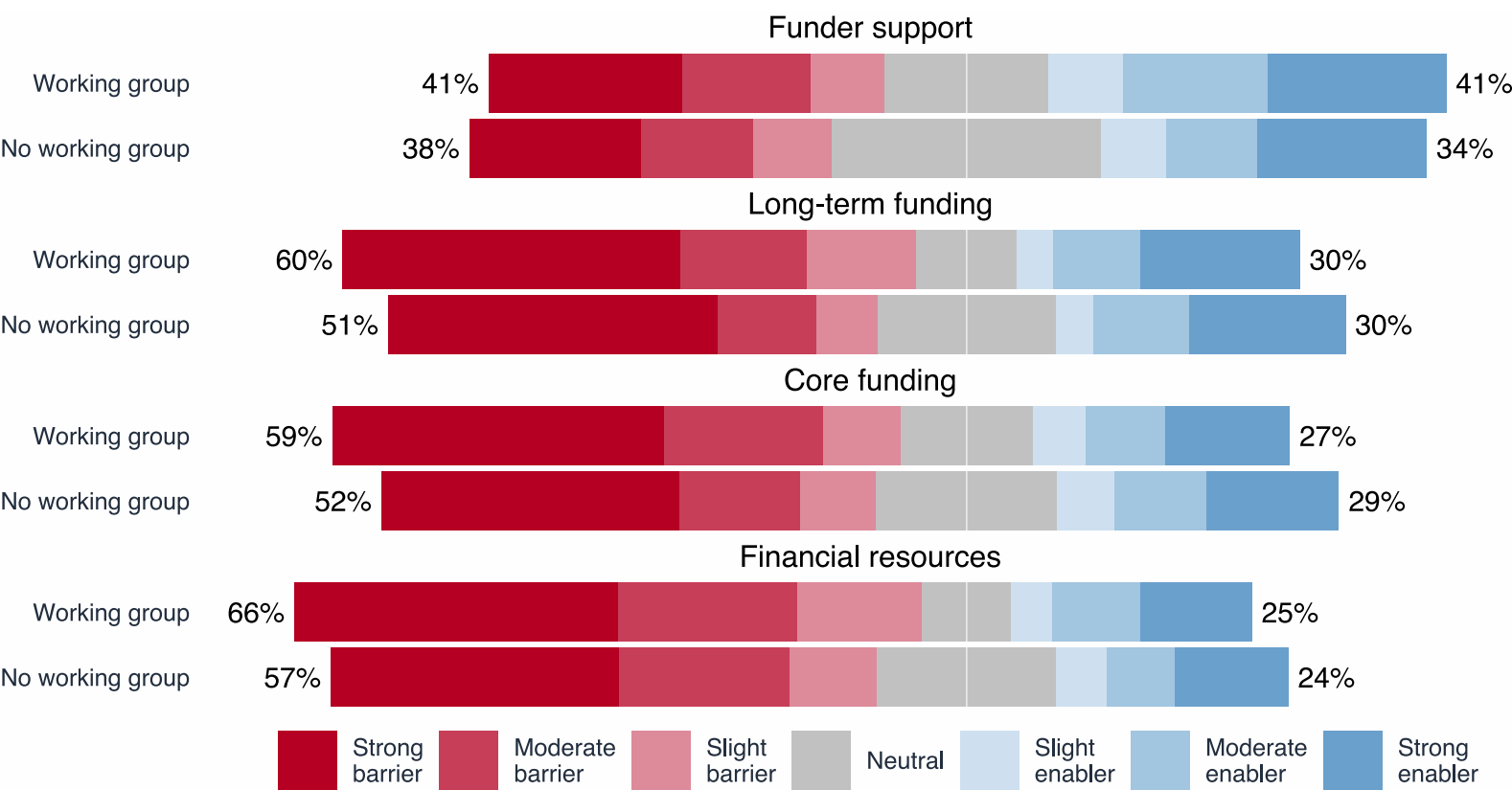
Funding-related factors are greater barriers to applying EDI principles for BIPOC-led organizations than for white-led organizations and organizations led by those from other under-represented backgrounds.

Access to financial resources is particularly problematic for BIPOC-led organizations. Unlike with other organizations, lack of financial resources is a more important barrier than the type of funding and funder support.

Funding and finances also tend to be greater barriers for organizations with equity working groups.

To what extent are each of the following barriers or enablers for your organization as it seeks to apply equity, diversity and inclusion principles in its work?

% organizations by existence of an equity working group



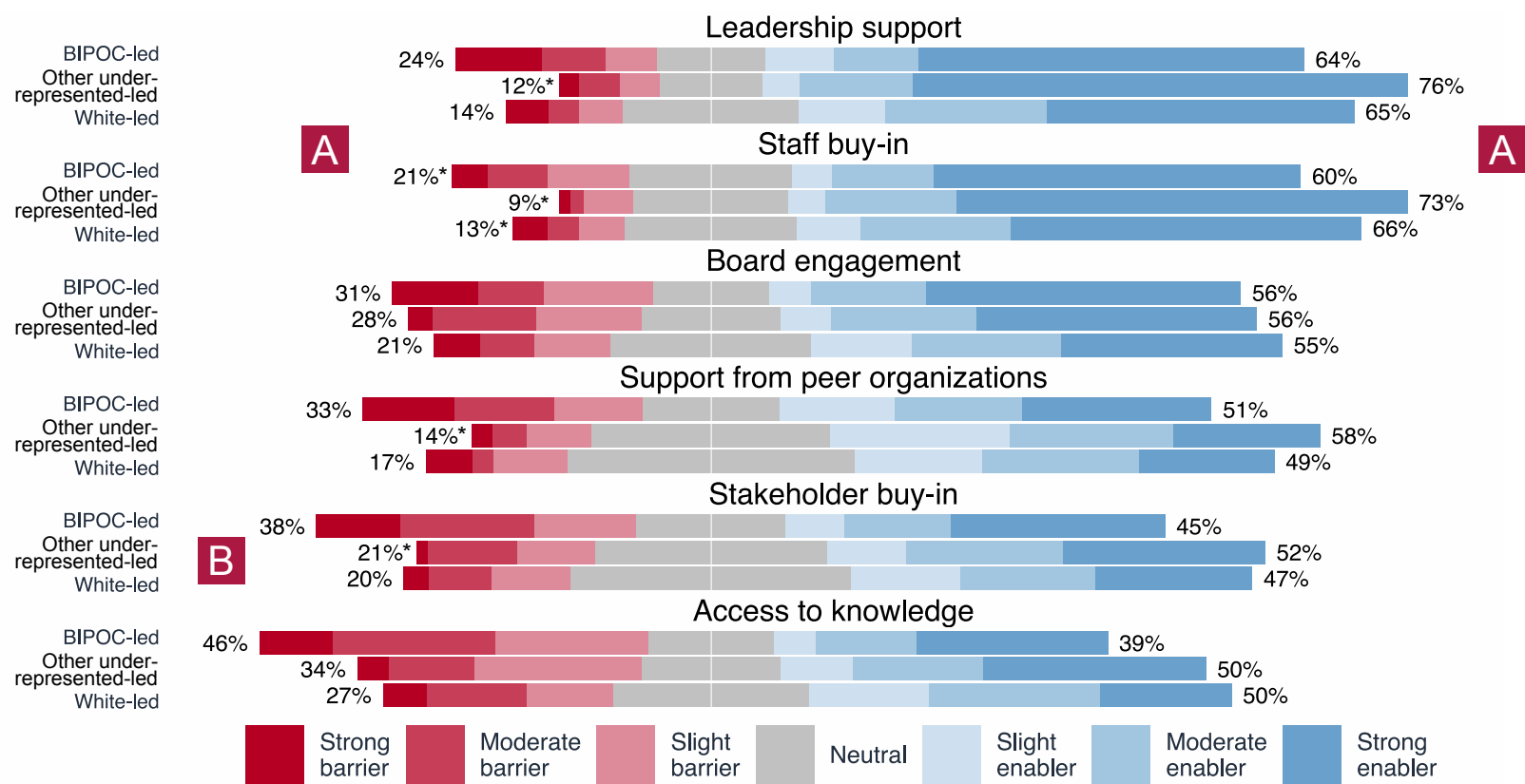
Organizations with equity working groups face greater challenges with funding-related factors and financial resources than organizations without them.

At first glance, this may seem paradoxical but we believe it is driven by the fact that these organizations are engaging in more EDI-related work and want to do even more but are constrained by financial concerns.

BIPOC-led organizations are also facing greater challenges with buy-in, engagement and access to knowledge.

To what extent are each of the following barriers or enablers for your organization as it seeks to apply equity, diversity and inclusion principles in its work?

% organizations by leadership



A Organizations led by leaders from other under-represented backgrounds are more likely to view leadership support and staff buy-in as enablers while BIPOC-led organizations are more likely to see them as barriers.

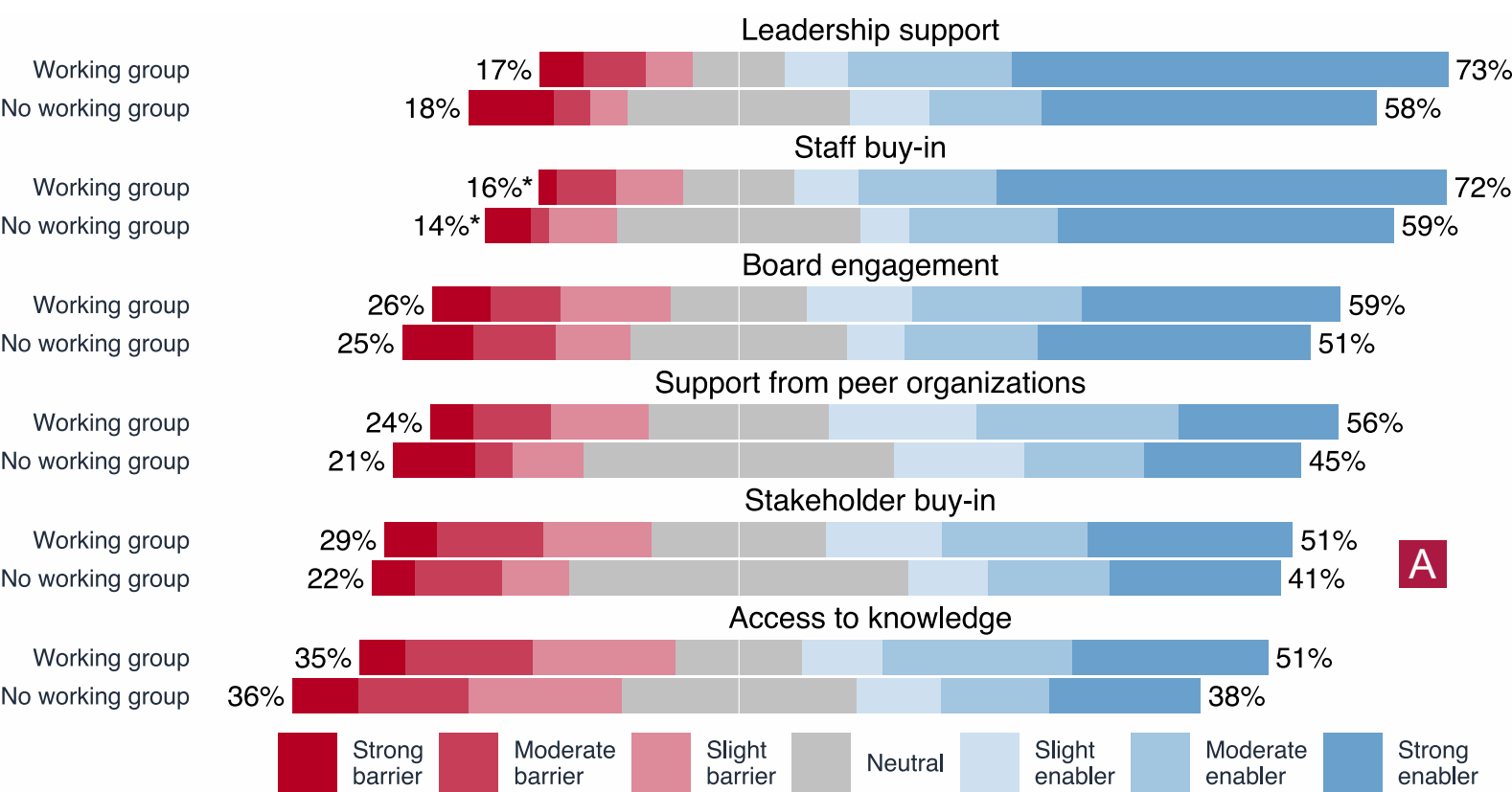
B BIPOC-led organizations are particularly likely to see lack of stakeholder buy-in and difficulty accessing knowledge as barriers to their efforts to apply EDI principles in their work.

* use with caution

Organizations with equity working groups are more likely to view these factors as enablers of their work.

To what extent are each of the following barriers or enablers for your organization as it seeks to apply equity, diversity and inclusion principles in its work?

% organizations by existence of an equity working group



Organizations with equity working groups are more likely to see all these factors as enablers, mainly because they are less neutral about them. They are not noticeably more likely to see most of them as barriers.

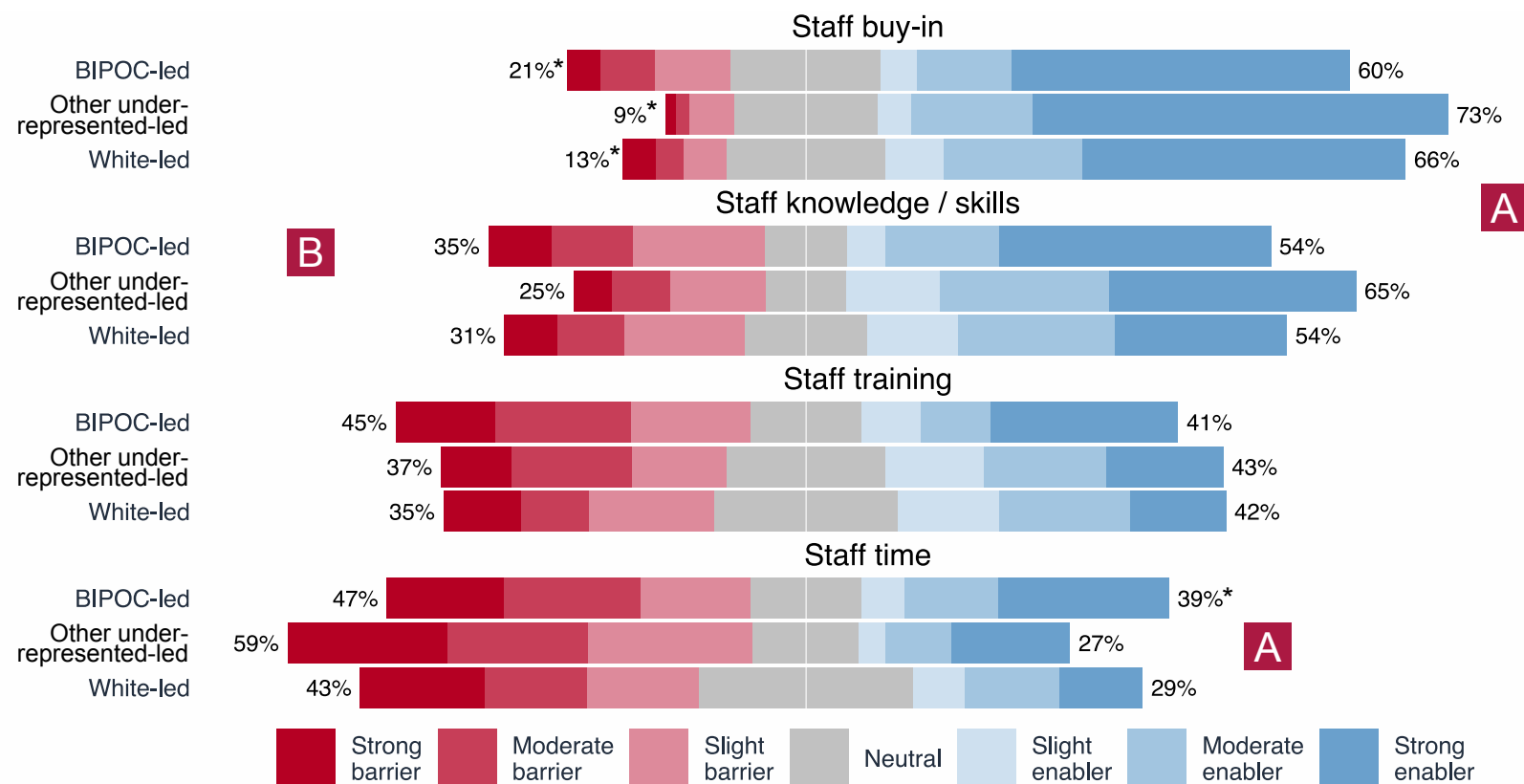
A Stakeholder buy-in is an exception to the general trend. Organizations with equity working groups are more likely to face challenges in this area. We suspect that this is linked to their generally higher level of engagement in EDI work.

* use with caution

BIPOC-led organizations are more likely to face most staff-related barriers.

To what extent are each of the following barriers or enablers for your organization as it seeks to apply equity, diversity and inclusion principles in its work?

% organizations by leadership



A Organizations led by those from other under-represented backgrounds are more likely to view staff buy-in and skills as enablers to their EDI work but face particular challenges finding sufficient staff time.

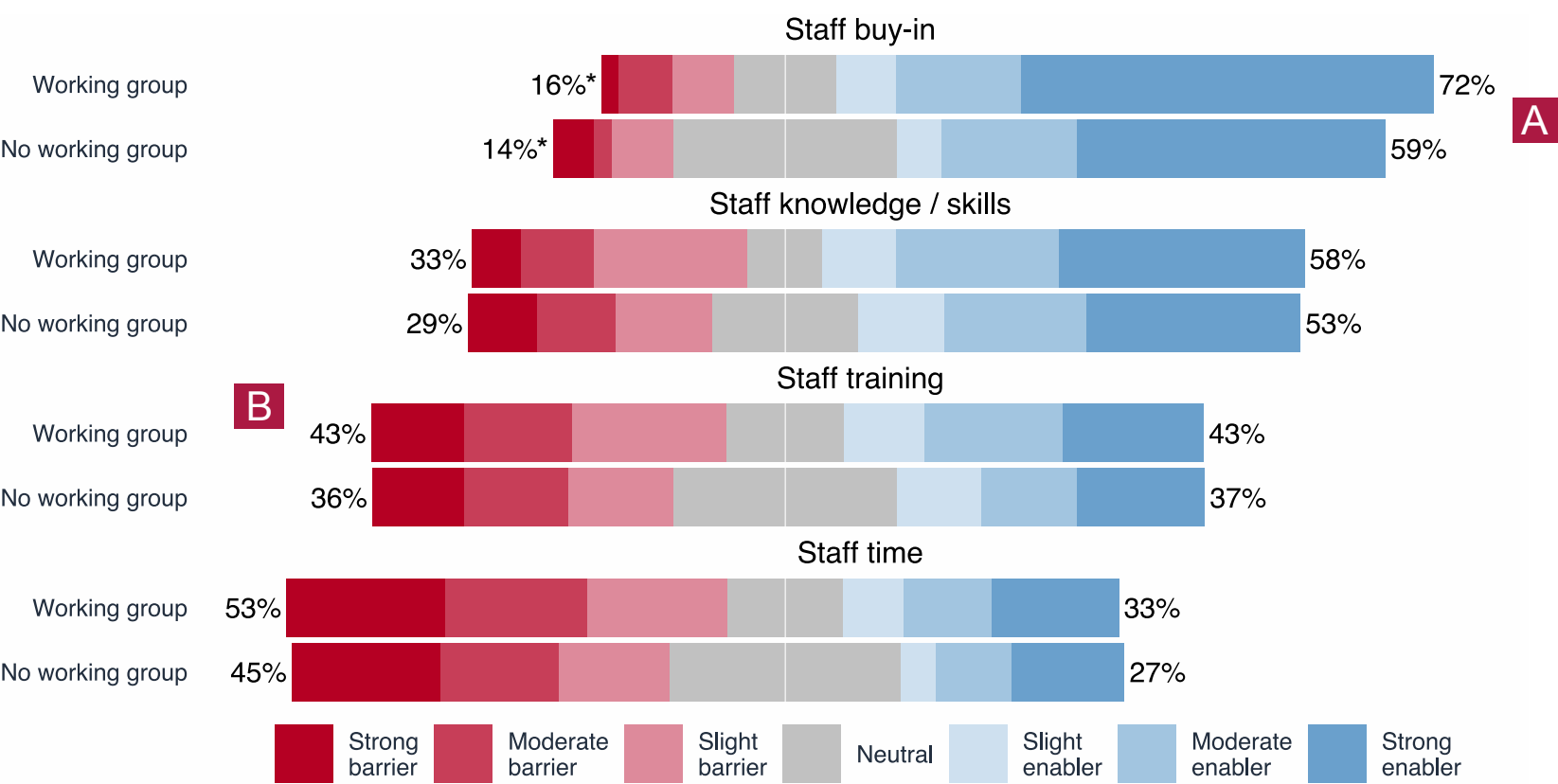
B BIPOC-led organizations are facing greater difficulties with staff training and buy-in.

* use with caution

While organizations with equity working groups have greater staff buy-in, they are more divided in their response to other staff factors.

To what extent are each of the following barriers or enablers for your organization as it seeks to apply equity, diversity and inclusion principles in its work?

% organizations by existence of an equity working group



Again, organizations with equity working groups are less likely to be neutral about potential factors.

A Organizations with an equity working group tend to have greater staff buy-in.

B Organizations with equity working groups are more likely to report most factors as barriers, particularly staff time and training. This is likely because these organizations tend to be engaged in more EDI-related activities.

* use with caution

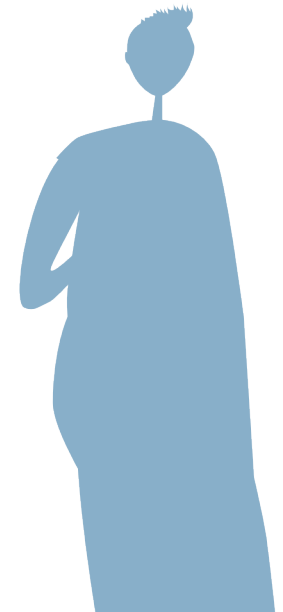
Attitudes and opinions

To better understand the context of their responses, the survey asks respondents to agree or disagree with a series of statements focusing on the degree to which EDI issues have become more prominent since the onset of the pandemic, the extent to which their organization is well situated to apply EDI principles in its work and the EDI-related values respondents believe it holds.

Overall, respondents see the value of working in ways that enhance EDI, believe their organization is doing so and see the value of embracing more active frameworks such as ARAO. While most respondents believe their organization is well positioned to advance its EDI practices and believe

that the importance of EDI has increased since the pandemic, views on these topics are more divided.

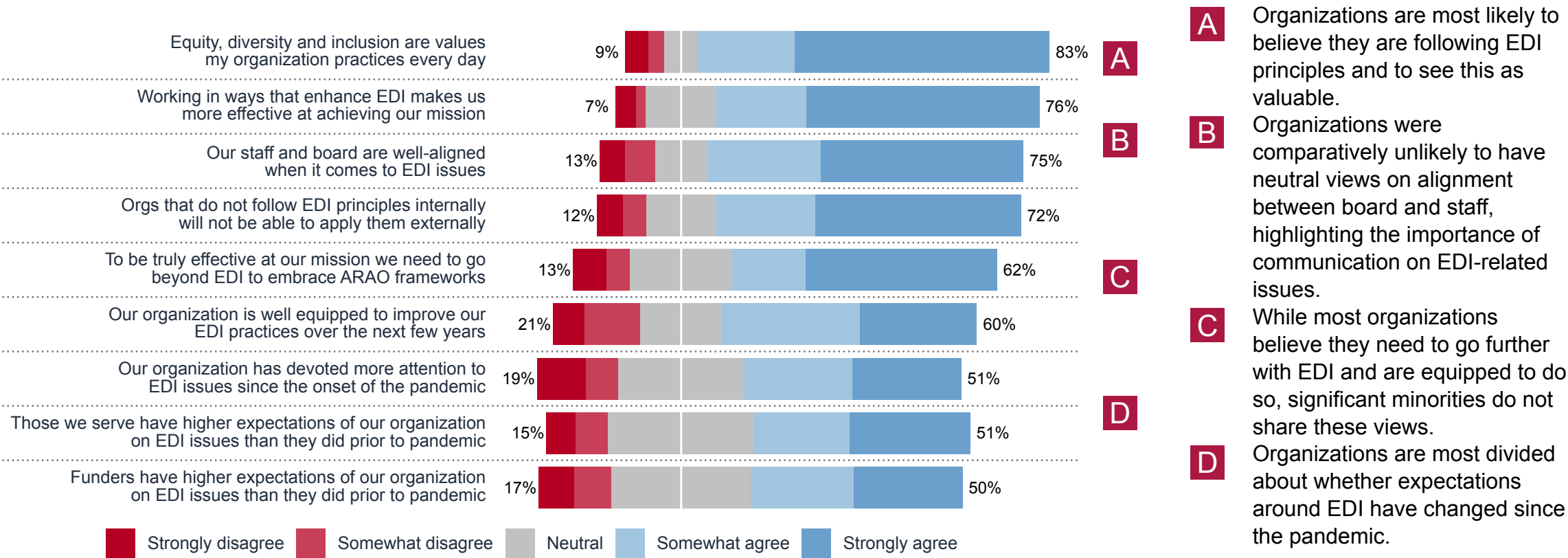
There are significant differences in views between organizations with BIPOC leaders or leaders from other under-represented backgrounds and white-led organizations. White-led organizations are more uncertain that the importance EDI has shifted since the pandemic, less likely to believe that working in ways that enhance EDI makes them more effective and to see the value of embracing more active frameworks. Similar patterns are seen with organizations lacking equity working groups.



Overwhelmingly, organizations see the value in EDI practices and are well situated to intensify their efforts; they are more divided on whether the pandemic is a driver.

Please rate how much you agree or disagree with each of the following statements.

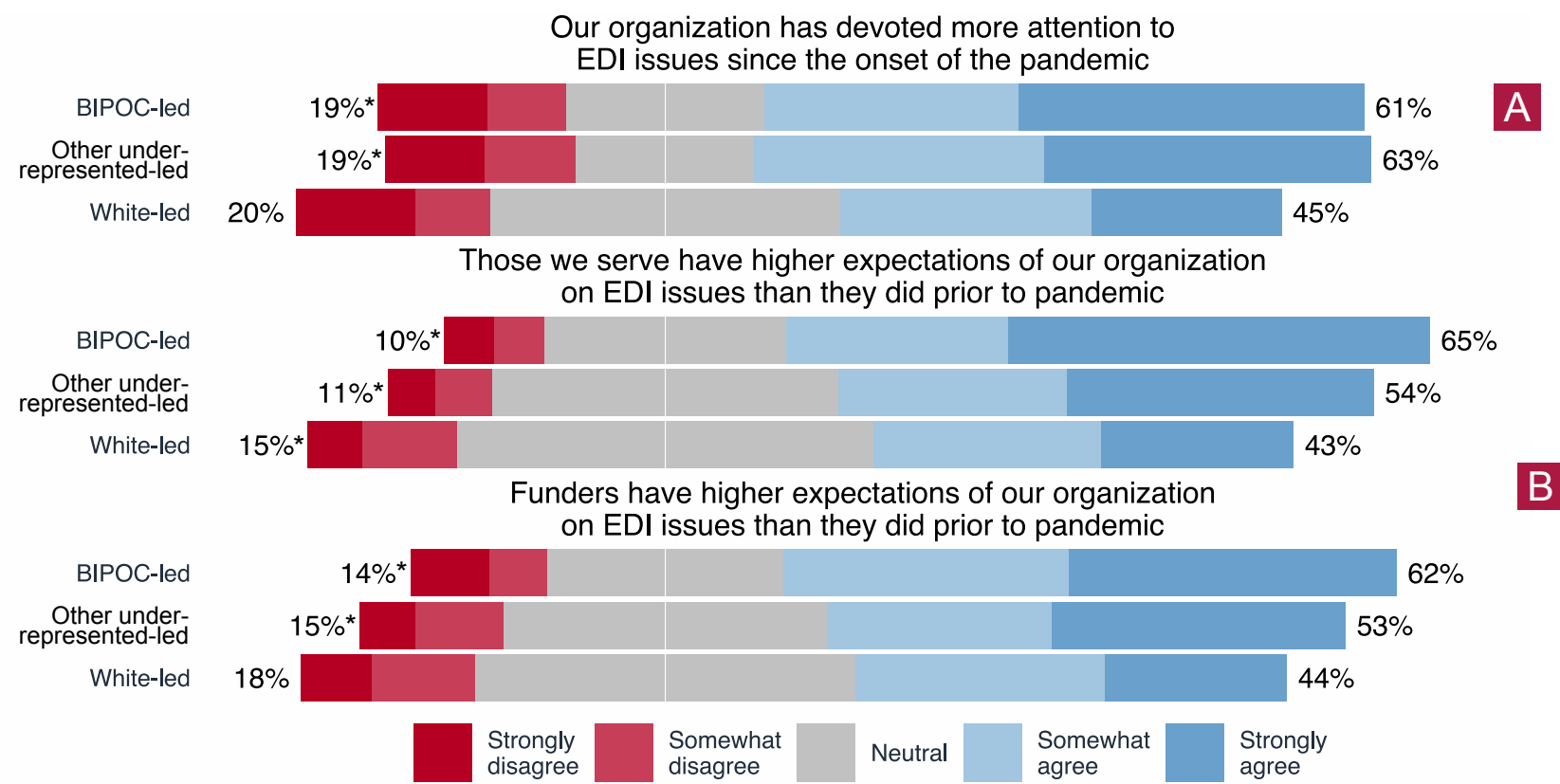
% organizations



White-led organizations are less likely to agree that the pandemic has driven shifts in expectations around EDI.

Please rate how much you agree or disagree with each of the following statements.

% organizations by leadership



A Non-white-led organizations are more likely to have devoted more attention to EDI issues since the onset of the pandemic.

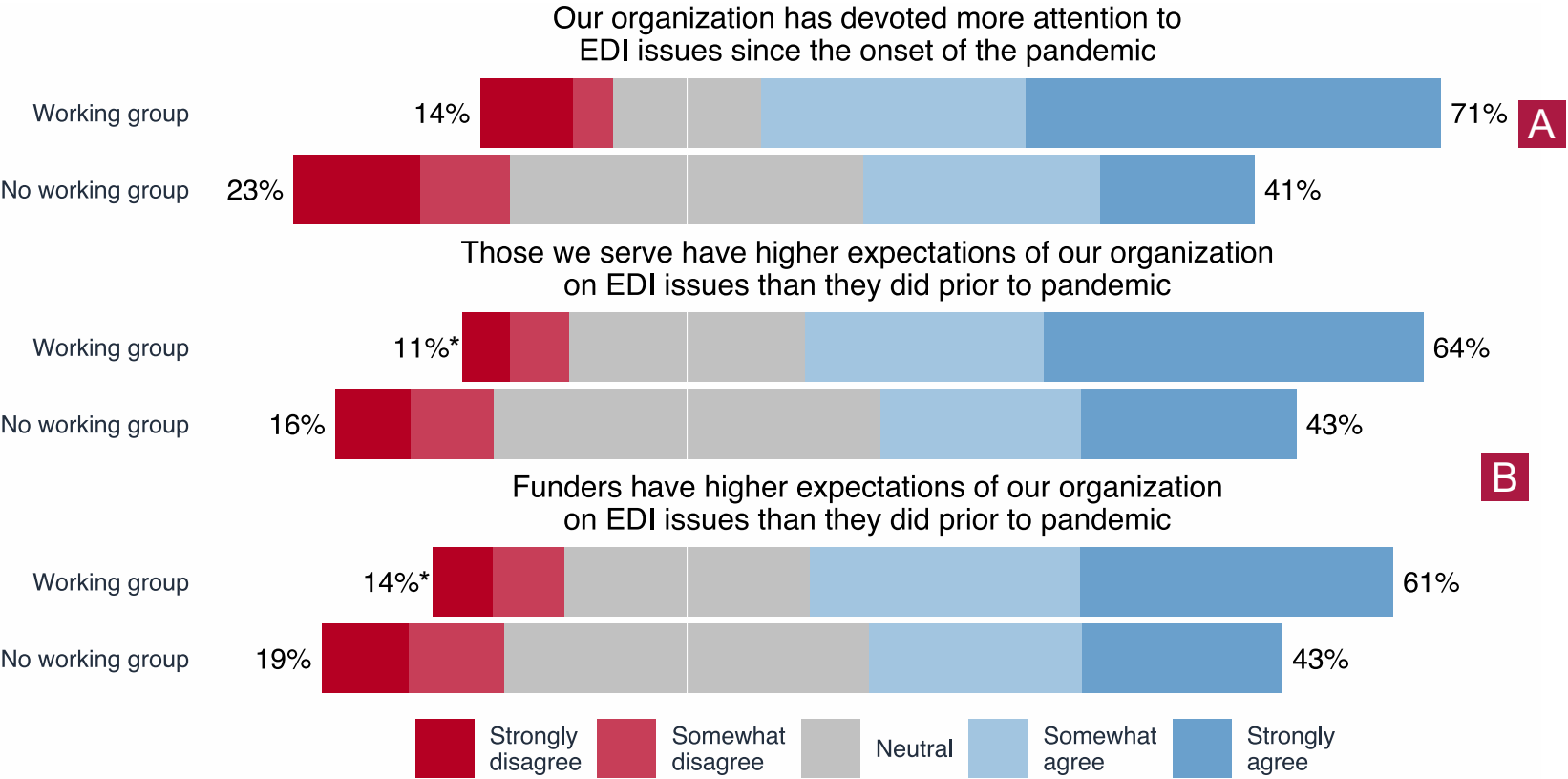
B Organizations with minority leadership, particularly those that are BIPOC-led, have seen increased expectations around EDI issues since the onset of the pandemic.

* use with caution

Conversely, organizations with equity working groups are more likely to agree the pandemic has driven shifts in EDI expectations.

Please rate how much you agree or disagree with each of the following statements.

% organizations by existence of an equity working group



A Organizations with equity working groups are significantly more likely to have devoted more attention to EDI issues since the beginning of the pandemic.

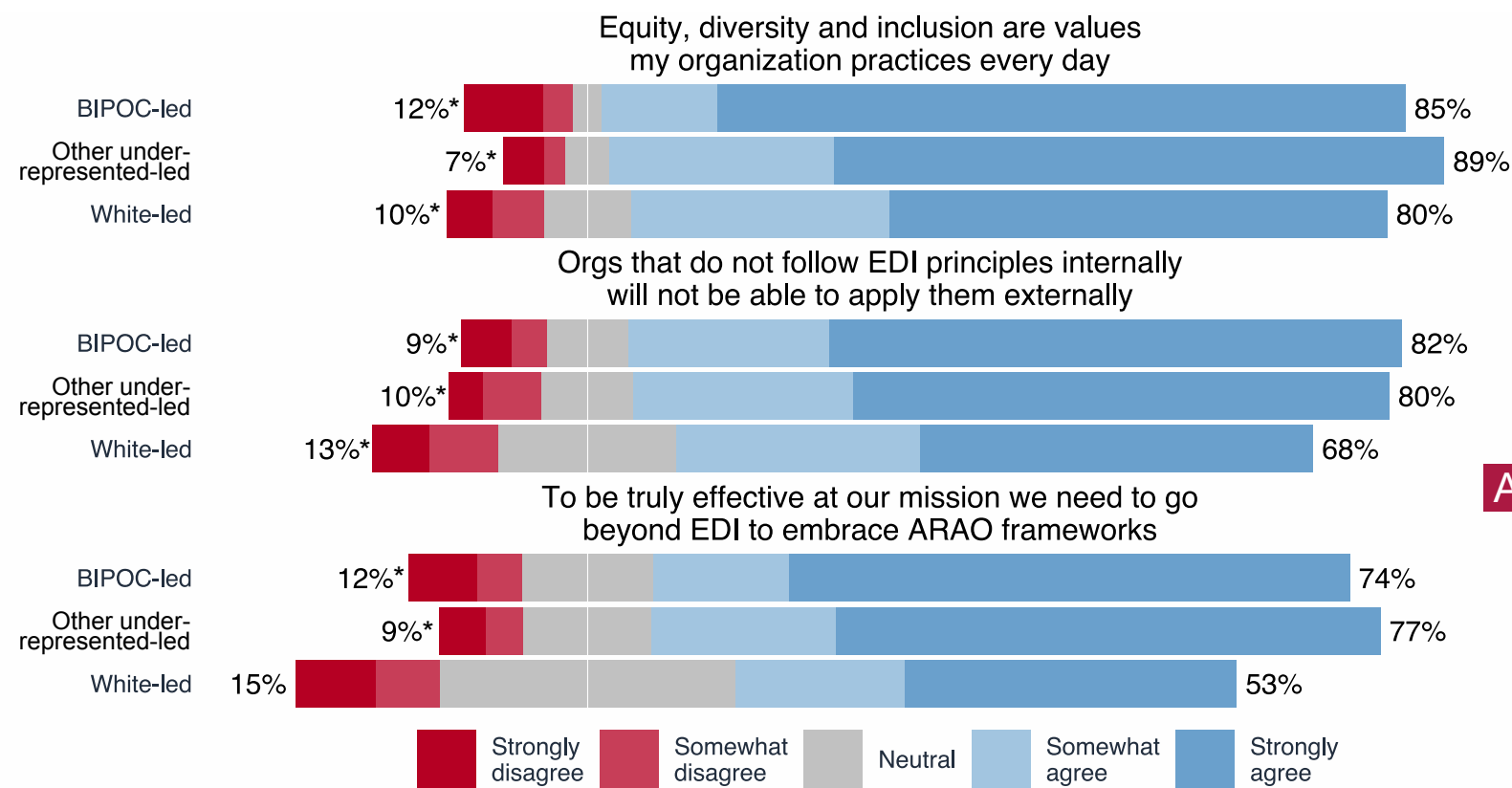
B Similarly, organizations with equity working groups are more likely to feel that expectations on EDI issues have increased since prior to the pandemic. Organizations without working groups are more likely to be neutral, which for many we believe means they are unsure.

* use with caution

While virtually all organizations believe they practice EDI values, white-led organizations are less likely to see the need for greater internal and external efforts.

Please rate how much you agree or disagree with each of the following statements.

% organizations by leadership



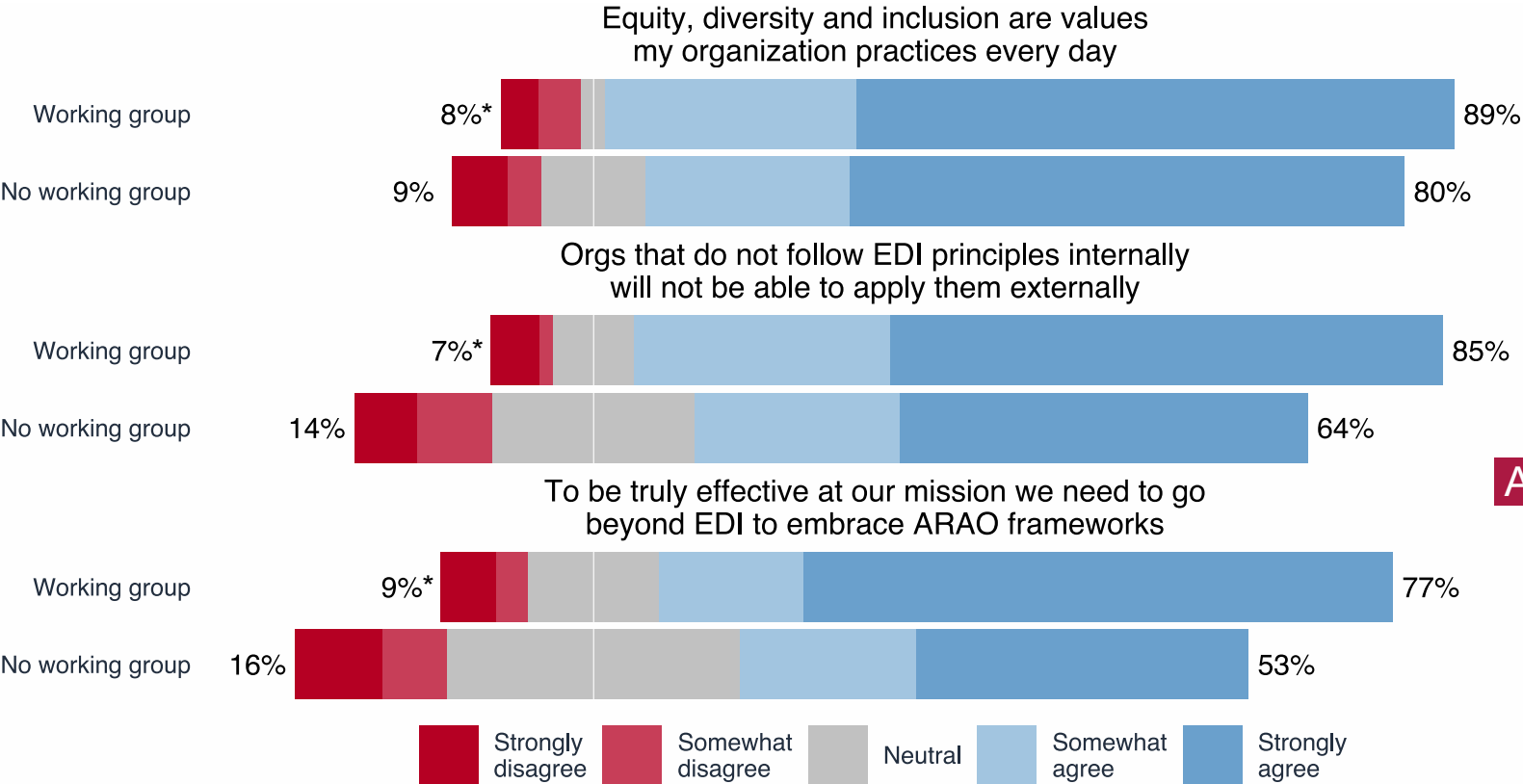
A The lesser likelihood of white-led organizations to see the need for greater EDI-related efforts is driven more by neutrality on the issues than outright disagreement.

* use with caution

Organizations with equity working groups are markedly more likely to see the need for greater efforts related to EDI, both internally and externally.

Please rate how much you agree or disagree with each of the following statements.

% organizations by existence of an equity working group



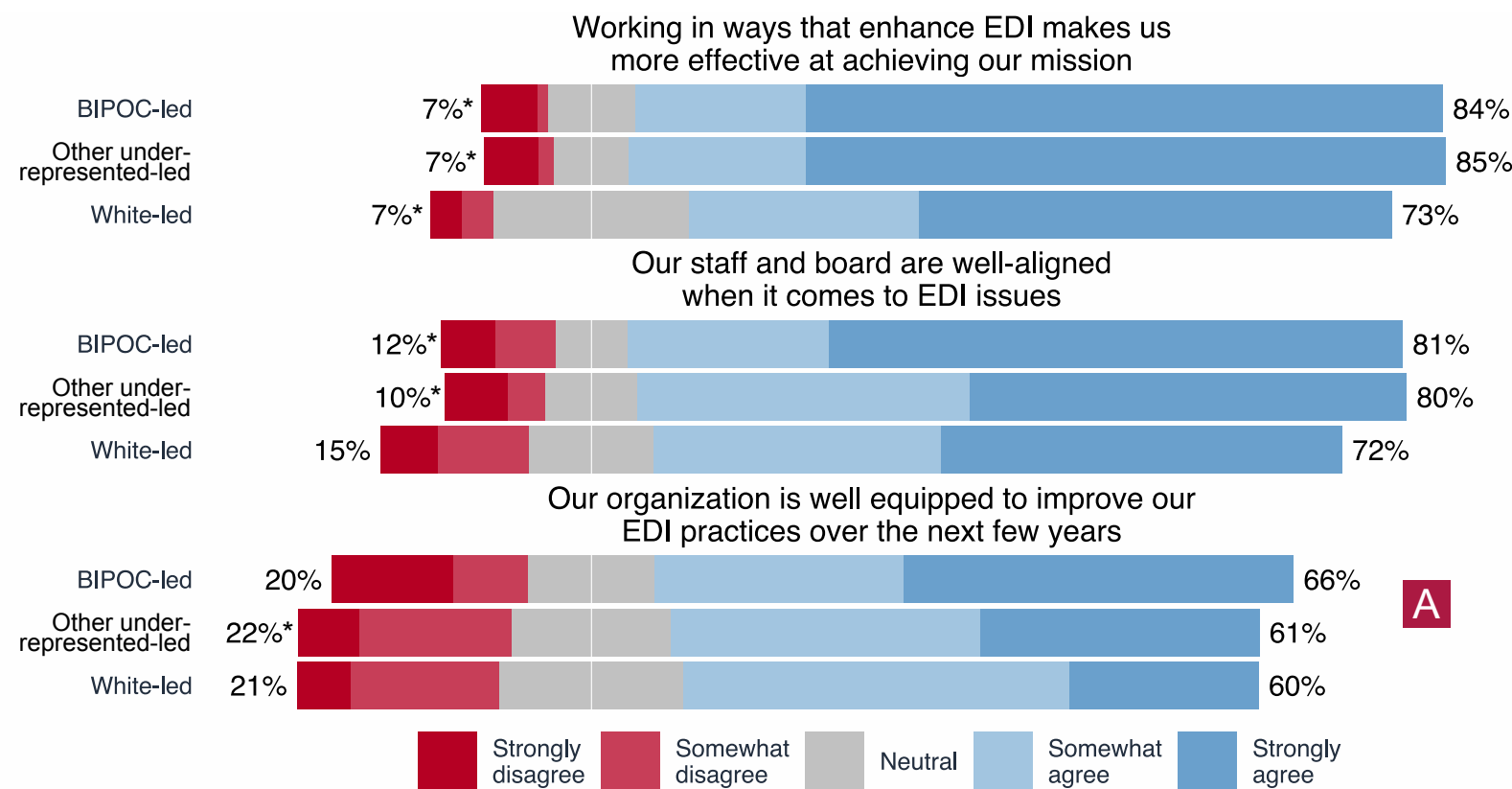
A As with differences by leadership characteristics, the lesser likelihood organizations without equity working groups to see the need for greater EDI-related efforts is driven more by neutrality than clear disagreement.

* use with caution

White-led organizations are somewhat less likely to see the utility of EDI-related work and less well positioned to advance it.

Please rate how much you agree or disagree with each of the following statements.

% organizations by leadership



A

As with most other attitudes and opinions not related to expectations since the pandemic, the major contrasts are between white-led and minority-led organizations.

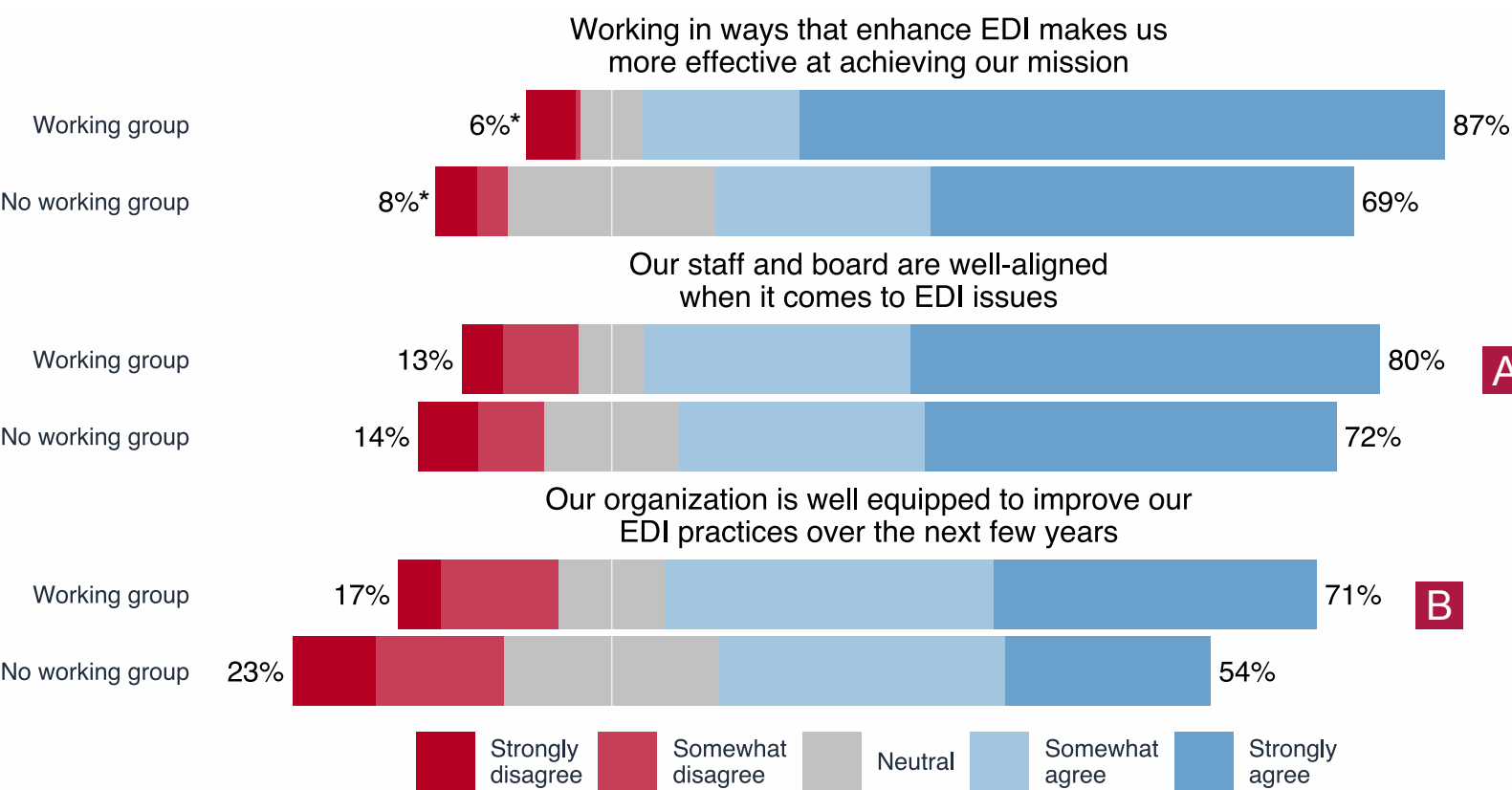
One of the only potentially significant variations from this pattern is with views on being well positioned to improve EDI practices, suggesting that organizations led by those from other under-represented backgrounds may face particular barriers. Again, this is likely driven by the characteristics of these organizations (e.g., size, sub-sector, etc.).

* use with caution

Organizations with equity working groups are better positioned for EDI-related work and to see the utility of this work.

Please rate how much you agree or disagree with each of the following statements.

% organizations by existence of an equity working group



A Organizations with and without working groups are less split in their views on alignment between staff and board than they are on many other issues.

B Differences in views about whether the organization is well-equipped to improve EDI practices based on the presence of working groups are larger than the differences based on leadership characteristics, suggesting that working groups can be a key way forward for organizations.

* use with caution

Methodology

The survey was conducted online via an interactive website between August 18th and October 31st, 2022. In total, 1,655 respondents completed the survey.

The survey used a dual component methodology to ensure that it reached a broad range of charities and nonprofits. The first component consisted of a known population of registered charities that were not religious congregations and had annual revenues of \$30,000 or more. These respondents were reached directly via email. The second component consisted of an unknown population of nonprofits, qualified donees, and registered charities (potentially including religious congregations and organizations with less than \$30,000 in annual revenue) that were reached indirectly, through

invitations distributed by partner organizations. These partners were predominantly umbrella groups and capacity building organizations focused on particular geographies, causes, or populations served.

Survey responses were weighted by organization size, region and sub-sector to produce estimates believed to be more representative of the nonprofit sector as a whole. A comparison of the weighted and unweighted distributions of respondent organizations can be found on the next page.

Multivariate analysis was used throughout to identify key drivers. This analysis clearly highlighted the critical importance of leadership characteristics and the presence of equity working

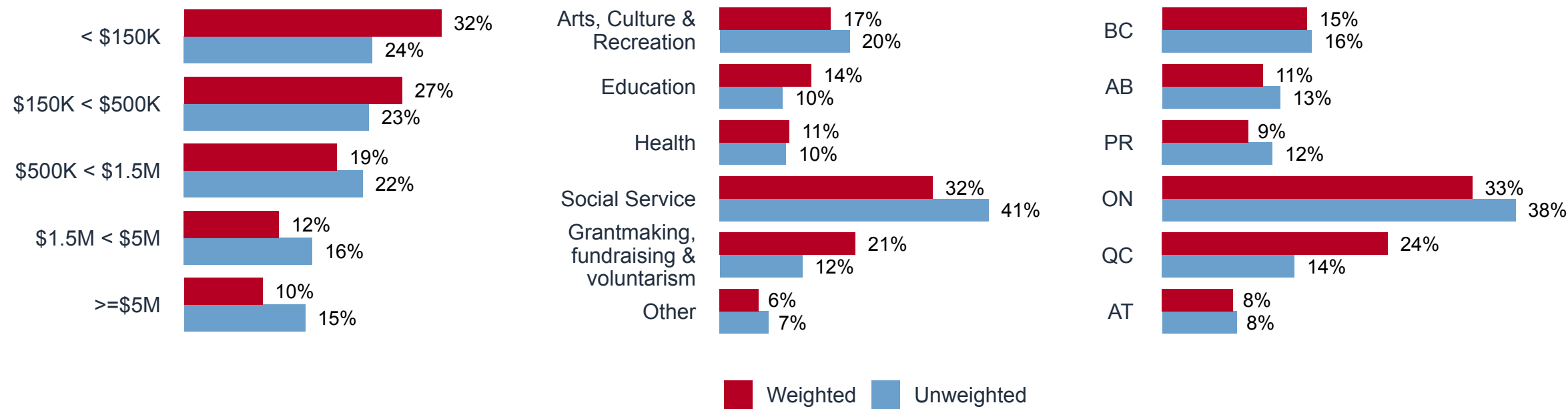
groups, even when organizational size, region, and cause were taken into account.

Compared to many other surveys of charities conducted by Imagine Canada, region and sub-sector were less important explanatory factors, though organizational size, as measured by number of paid staff, remained an important factor.

Generally speaking, the larger the number of organizations contributing to a given figure and the more consistent their responses are, the more accurate an estimate is likely to be. When the number of charities contributing to an estimate is small and/or their responses are highly variable, we have marked the estimates with “*”. These estimates are still useful for decision-making but should be used with caution.

Responses are weighted by a number of factors including revenue size, sub-sector and region to produce estimates more characteristic of the population of organizations.

% survey respondents



Glossary

BIPOC: The acronym “BIPOC” stands for Black, Indigenous and People of Colour. We recognize this is a controversial term that is justly criticized for masking the diverse experiences and perspectives of the populations it includes. Unfortunately, given the size of the sample, we must group responses from Black, Indigenous and racialized leaders together to have sufficient statistical power to highlight differences by organizational leadership.

BIPOC-led: Organizations where a significant fraction of senior leadership is made up of people who are Black, Indigenous and/or of other non-white backgrounds.

Equity audit: Formally, equity audits are systemic, wide-ranging reviews of existing organizational policies, practices and structures to identify factors perpetuating or

promoting inequities. For the purposes of the survey, equity audits were defined as some form of systematic review using an equity, diversity and inclusion lens.

Equity working group: These groups are established to identify and address equity-related issues. Commonly groups draw membership from across the organization and emphasize a diversity of perspectives and backgrounds. For the purposes of the survey, equity working groups were defined as some sort of committee or working group focussed on issues of equity, diversity and inclusion.

Minority-led: This is a collective term referring to both BIPOC- and other-under-represented-led organizations.

Other under-represented-led: Organizations led by people from backgrounds commonly

under-represented among senior leaders of nonprofit organizations. Common backgrounds specified by respondents include being 2SLGBTQIA+, women, having disabilities or medical conditions, being immigrants and members of linguistic minorities.

White-led: Organizations that are not led by those from BIPOC or other-under-represented backgrounds.

Under-represented communities / populations: These terms are used in individual survey questions to denote individuals who are commonly under-represented among employees and/or volunteers.



Shifting Power Dynamics

Equity, diversity, and inclusion in the nonprofit sector

Author: **David Lasby**
French translation: **Chrystiane Harnois**

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