



Canadian Society for Association Executives | Société Canadienne Des Directeurs D'Association

# Equity, Diversity and Inclusion Three-Year Action Plan

2022-2025

Developed by aKollage Consulting Incorporated



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# Introduction

The Canadian Society of Association Executives is committed to proactively identifying and addressing any systemic barriers in our policies, practices, procedures, programs, and services so that we can provide a respectful, inclusive, and safe work environment, represent the associations we serve and lead by example.

Identities are multifaceted and may include a combination of individual attributes and experiences. We can deliver better services when we are able to identify with lived experiences to the people we serve. This includes at the Board and all levels of the organization. It is not enough to have a diverse workplace. We believe in an environment where all board members, staff, and partners feel safe, have a sense of belonging, are valued, and can thrive. This level of inclusion enables everyone to feel a deeper connection to their colleagues, leadership, industry and the associations we serve.

We believe that when we know better, we achieve better through action. To know better, we are enabling the future of all associations that work with us, that lean on us, and that learn from us to continue to strive for better results, as we aim to on our Equity, Diversity and Inclusion (EDI) odyssey ahead.

## Our process that got us here

We realized that to progress, we needed to refocus our EDI efforts to bring everyone to a common place. Earlier in 2022, we engaged an external consultant that worked with the CSAE Board, executive and staff to understand the current state of the organization.

Discussions highlighted three key focus points that were aligned with the focus group facilitated sessions.

- 1. What has been working well within CSAE** - more specifically what behaviours, supports, tools have been exhibited that participants feel should continue within the organization.
- 2. What barriers and challenges exist** - understanding what tools are necessary and whether anything gets in the way of overcoming these barriers and challenges.
- 3. How to find a path forward with opportunities that CSAE can focus on in the upcoming EDI Action Plan** – with a focus to understand what opportunities exist to help CSAE progress in its EDI journey.

Perspectives were brought forward through focus group discussions, one-on-one interviews with staff and an online survey to capture feedback.



### Focus Groups

30 participants ( Board members, staff, and network volunteers) were a part of 4 different focus group conversations during the last two weeks of May.



### One-on-One Interview

6 individuals engaged in a one-on-one conversation with the consultant discussing the current organizational culture. This created a safe space to confidentially share insights and experiences.



### Online Survey

13 responses were received to an online questionnaire designed to capture feedback from stakeholders on the organization's EDI current state with recommended actions for consideration.

There were five key themes, each with a magnitude of importance, that emerged from the questionnaire as areas of importance. These include:



Building an Inclusive Culture



Being representative of those we serve



Providing the right tools internally and to our stakeholders



Providing Awareness and Education



Benchmarking and Measurement

In addition to feedback from the Board, staff of CSAE and other stakeholders, various operational and strategic policies and processes were provided for aKollage consulting to review from an EDI lens. These polices and processes include board and staff recruitment, working groups, onboarding, and organizational policies. The organization has clearly taken EDI principles into much of its work with intent. Opportunities were

identified to support CSAE to continue to strive for excellence. This included providing an overarching commitment to the organization, reviewing the board application requirements and terms of references, expanding opportunities for the network and volunteer application process, enabling greater opportunities for individuals to see themselves in the recruitment of positions within the organization, and finding ways to compensate on stretch opportunities.

Many of these areas require an understanding of demographic data as a best practice to enable greater access for equity deserving groups and better understanding of measures for progress. Finally, the consultant worked closely with the Board to identify an EDI vision and values for CSAE and set key goals aligned with moving the progress of CSAE's EDI journey forward for years to come.

While the actions identified in this plan are achievable, they are without a doubt, ambitious. They are formed by all who have a significant stake in this organization – the Board and staff of CSAE. To make this ambitious plan progress, we all need to open our minds and hearts, commit time, and join in a collective effort to make real and lasting change.

### **The Board and Leadership have accepted this challenge!**

The Action plan itself was drafted with an external consultant, aKollage Consulting Incorporated that specializes in EDI strategic planning. However, the content has been developed by the organization for the organization through the input received by all board members and staff during the current state analysis. We know that the actions and the work that we do is going to be an iterative process. We will continue to build on these actions, though this will be our starting ground for progression.



# Vision

“Evolving together to build better associations through inclusion and empowerment.”

# Values

The spirit of the movement of this important work is embedded in operating within four essential values identified below.



**Transparency** – We will be open about our EDI Journey and will share both our successes and challenges along the way. Within our transparency, we will be open to our vulnerabilities in the process, continue to learn and be okay with discomfort.

**Respect** – We will foster an environment where each person feels valued, that they feel they belong, are heard, and an environment where we are aware of our intentions and the impact of these intentions.

**Empowered** – We will work in a culture where everyone feels psychologically safe in their environment so that they can contribute effectively and bring all of themselves.

**Representative** – We will aim to be representative of the communities and associations we serve.

# Defining what we mean

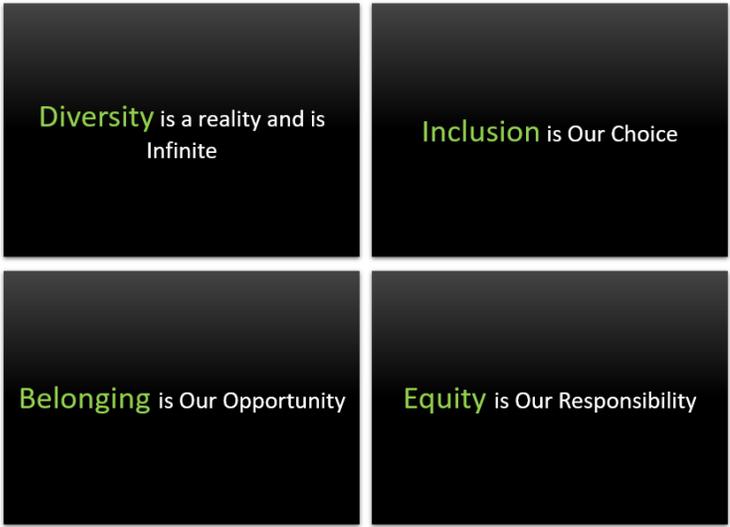
It is important that we are all starting on the same foot, that our interpretation of Equity, Diversity and Inclusion is rooted in the same foundation.

**Diversity** is found in the varied perspectives and approaches to work all staff, Board and association members with different identity groups bring. This includes diversity in demographics, lived experiences, and cognitive approaches to our work. *Diversity is infinite and a reality.*

**Inclusion** is the degree to which all board members, staff and association members perceives that they *belong*, and their *uniqueness* is valued. *Inclusion is our choice.*

**Belonging** is not about fitting in. It is belonging to yourself first and being who you are. *Belonging is our opportunity.*

**Equity** comes in providing appropriate tools, processes, structures, and programs that are relevant to the needs of our Board members, staff, and association members. *Equity is our responsibility.*



# Our Strategic Pillars

Our choice...Our opportunities...Our responsibility...These are our commitments to Act within CSAE. It is these actions that are critically aligned with the pillars in our [strategic plan](#).

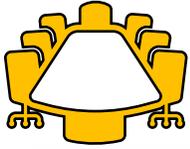
- 1. Be the **champion for associations** in Canada
  - We aspire to be transformative as an advocate modelling the way for all associations in Canada.

2. Be the **centre of excellence** for the Canadian association sector
  - We will aim to provide our members with the tools and mechanisms that we learn and grow from along the way.
  
3. Be the Model for **continuous improvement** for association management
  - We acknowledge where we are at within this journey and that this will be an ongoing process that is transformative in nature. We aim to be a demonstratable disruptor by achieving better while learning to be better.

## Our Goals and Actions

We have addressed **what** we stand for when it comes to our EDI journey, and our Actions will determine **how** we will achieve this strategy. Four key goals have been identified to help CSAE in our movement forward. These goals were developed based on an understanding of the current state and in collaboration with the Board and executive leadership. These goals are not identified in precedence of importance as all four equally contribute to the successful progress of CSAE's journey.





## Goal 1: We will focus on upholding EDI standards and accountabilities with the Board



### Action 1: Build a Commitment Policy

Develop an Equity, Diversity and Inclusion policy as a commitment to the Board, staff and the member of the association as reflection of the vision and values to guide daily priorities and as continuous work.

### Action 2: Enhance Board Representation

We know that with diversity comes strength. Action for the Board to be representative of the diversity across this Nation – to bring in broader representation of demographics and lived experiences.

Assessing areas such as competencies highlighted within the application process and what experiences the board is missing at each appointment cycle and by increasing EDI focus within the Board's Terms of Reference are opportunities to begin this process.

### Action 3: Increase Metrics in Application process

Currently, there is limited data collection on board members other than age/gender/geographic location to assess whether the board is representative. The focus has heavily been on skill sets in the competency matrix and not what lived experiences will bring value to the Board. Providing greater consideration for equity deserving representation would require asking individuals to voluntarily identify themselves within the application process.

Understanding the applicants through data collection and providing leadership and mentorship to engage those that may normally not be represented within the Board.



#### **Action 4: Build Capacity on the Board**

Onboarding with intent of working within the values of EDI within the Board and the function of the organization is critical for sustainability. Appropriate onboarding tools can help continue the successes. One mechanism would be to incorporate positions on the board for mentorship through the Board particularly when members have turned over so that more seasoned members can provide that ongoing mentorship to incoming members with EDI focus in mind. It is important to develop capacity on the board by creating greater awareness of EDI, becoming a champion and intentionally investing time in areas such as formal and informal mentorship of incoming board members that may traditionally have less opportunities.

There is opportunity to add EDI as a specific skill set in the competency model that the Board can benefit from. A dedicated EDI membership role on the board can provide appropriate lenses into the work derived by other committees such as governance, nominations, development, etc.

Finally, the Board can integrate training for members in areas of inclusive leadership and board governance to help continue to enhance capacity in new leadership.





## Goal 2: We will enhance our measures and hold ourselves accountable

### Action 1: Develop an Accountability Framework for CSAE

Identifying mechanisms of accountability is critical to ensure that CSAE's hard work on EDI continues to move along and that its efforts are sustainable going forward. Particularly when there is a smaller workforce, an accountability framework will provide mechanisms for an advisory committee to ensure that there is movement forward.

The framework would include assessing against all actions identified and managing its progress over the short, medium, and long term.

### Action 2: Collect Baseline Data and ongoing measurement

To provide appropriate services and to see who CSAE can increase outreach to, it is important to understand the demographics of its members. This data collection on demographics will enable greater member outreach, understanding of sectors and under representation, and extend targeted calls for participation. The initial collection of data will create a baseline for measuring progress and potentially identify new actions to sustain this important work. CSAE will continue to measure progress annually and set benchmarks to achieve with key indicators of success.



### Action 3: Identify a Benchmarking Tool

Identify benchmarking tools that work for assessing the organization such as inclusivity indexing, understanding demographics, and the Global Equity, Diversity and Inclusion Benchmarks (GDEIB) are tools to help assess and create benchmarks to achieve success.



## Goal 3: We will develop and share our tools that support EDI

### Action 1: Develop and Share Resources with Members

CSAE is on a journey and will be developing resources throughout its journey. This action commits to sharing the resources as they get developed with its members to use so that members do not have to recreate resources. As a leader, CSAE will model the way by continuing to share any resources developed. CSAE will also enable referrals for association members to other centres of excellence that can support their journey.

For ease, accessing resources that are already moving forward as best practice so that the organization does not need to reinvent the work. Becoming a partner of the resources such as the Canada 50/30 Challenge enables access to incredible resources while being financially responsible.

### Action 2: Incorporate an EDI lens into Policies and Processes

Develop a guide of considerations for policy and process development as a tool to reduce the possibilities of unintended barriers in the policies. This guide can be used and assessed regularly and shared with members as a tool for future policy development.

Truth and reconciliation is extremely important to CSAE to uphold within its accountabilities. To give it the presence that is necessary, CSAE will develop a separate strategy dedicated to this important priority.



### Action 3: Build Awareness and Education through Learning and Development Opportunities

Creating the space and opportunity for continuous learning on matters that impact EDI within the organization, its Board, staff and members including greater focus on Truth and Reconciliation, anti-racism/anti-oppression, unconscious bias, micro-aggressions, inclusive leadership, etc. These learning and development opportunities go beyond existing conferences and events will create space for conversation, intellectual discourse, and self-reflection for participants. This dedication to development will create

opportunities to incorporate learnings into building an inclusive culture both within the organization and with external partners and stakeholders.

#### **Action 4: Incorporate EDI into Events and Communications**

CSAE has been doing great work at incorporating EDI focused learning into conferences and events. This is an opportunity to develop a guide based on the commitment policy to build inclusive events with the intention of having dedicated focus on EDI. Ensure marketing materials and communications are inclusive both from an accessibility perspective and reflective of the folks served. Conduct regular accessibility assessments of tools used for website and communications.

### **Goal 4: We will continue to build an inclusive culture**

#### **Action 1: Bring together an Advisory Committee**

Striking a small steering/advisory committee inclusive of board members, staff, and volunteers with a clear mandate to support the implementation of the Action plan would be beneficial to ensuring that the organization is progressing forward on its commitments in the plan. This committee would also work towards identifying best practices to address within the organization based on the needs of the organization and will be representative in its structure.

#### **Action 2: Bring Greater Intention and Awareness in our Actions**

As a Board and as leadership within the organization, it is critical to be self-aware of individual actions and practice inclusive leadership. Create a space where all individuals, regardless of their levels within the organization can thrive and bring their best selves. Creating a space that is psychologically safe and enables individuals at all levels of the organization to thrive is critical.

Providing opportunities for senior leadership to engage in conversations with intention to hear all voices within



the organization and not just their direct reports. In addition, this is a call to action for all leadership and Board members to walk the talk and intentionally connect with members at large at events enables greater extension of voices at the decision-making table.

### **Action 3: Enhance the Network Volunteer Application Process**

Increasing engagement and diversity of perspectives through the network of volunteers across Canada is an excellent opportunity to increase participation and belongingness within the organization. Revisit the terms of reference in how the reach and application process is made and to whom the call outs are reaching will enable greater sector expansion to reach more diverse associations.

### **Action 4: Build Inclusive Recruitment and Development Processes**

Incorporate Inclusive recruitment processes including focusing on job descriptions, where and how jobs are posted, interview processes and onboarding of staff. The focus of the recruitment in addition to the merit and competencies that individuals bring to the positions is on incorporating practices for equity deserving groups to have greater opportunities within CSAE.

For internal staff, providing opportunities for stretch assignments to increase capacity and mentorship enables smaller organizations to maximize learning and development on the job.

## **Acknowledgements**

The development of this plan would not be possible without the amazing contributions, the open conversations and the trust that the Board, leadership, staff and volunteers placed in this process and with the consultant. We appreciate the passions and desires to move this work forward with an open mind and with intention of moving the needle forward with every new learning along the way.

This plan is intended to keep moving forward and will be a living document that will update with time, changes in experiences and current needs of the organization.

