IMAGINE CANADA

HR INTERVALS

Equity as a Practice

From Audits to Actions

2026

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Acknowledgements

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IMAGINE CANADA

Imagine Canada is a national, bilingual charitable organization whose cause is Canada's charities and nonprofits. Through our advocacy efforts, research and social enterprises, we help strengthen charities, nonprofits and social entrepreneurs so they can better fulfill their missions. Our vision is of a strong Canada where charities work together alongside business and government to build resilient and vibrant communities.

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HR INTERVALS

HR Intervals offers free resources specifically designed for nonprofit leaders and managers to help guide effective, equitable HR practices. Whether it's about attracting talent or fostering a positive work environment, HR Intervals is every nonprofit's go-to trusted HR resource.

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Advisory Council

The development of these resources was guided by the insights and expertise of sector leaders serving on the Equity Benchmarking Project Advisory Council:

- Abdul Nakua - Muslim Association of Canada
- Anuradha Dugal - Women's Shelters Canada
- Michelle Baldwin - Impact United Academy and Equity Cubed
- Pamela Uppal-Sandhu - Ontario Nonprofit Network
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- Rochelle Ignacio - Tamarack Institute for Community Engagement
- Shereen Munshi - The Circle on Philanthropy & Aboriginal Peoples in Canada

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Ce rapport est également disponible en français: La pratique de l'équité : passer de l'audit à l'action

French Translation: Cornelia Schrecker

Introduction

Every organization has a responsibility to remove barriers and harm. This toolkit offers a framework and process for organizations to not only start this work, but to understand how it can be done in the long-term. The work may start with a review, or an audit, to understand where you are at as an organization and who faces barriers or is experiencing harm. But it also goes further, to support you in understanding how to make equity an on-going practice. It is designed to support you from **moving from audits into action**, through an iterative process that builds your capacity to be more equitable. This process will look different for every organization, and this toolkit is designed to help you figure out what it might look like, no matter who you are or who your target community is.

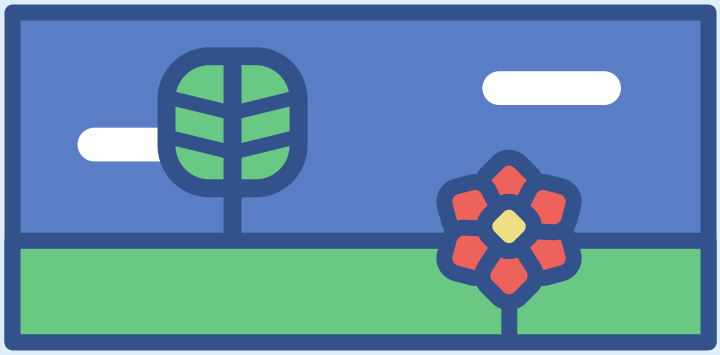
How to Use this Guide

This toolkit is designed to provide guidance for small- and medium-sized organizations seeking to integrate more equitable practices and ways of being. This guide emphasizes "Equity as a Practice," a circular and adaptive approach rather than a linear checklist. In addition to outlining this process, we have created a series of "pop-outs":

- **Reflection questions:** Throughout the guide, you'll find reflection questions designed to help you apply the concepts to your specific organizational context. Feel free to use these independently or with your team.
- **Case studies:** These provide hypothetical examples and real-world research to illustrate complex dynamics and prompt further analysis.
- **Frameworks:** These provide "windows" into relevant theoretical frameworks that will help you deepen your reflection and understanding of equity issues.

Remember, the process outlined is designed to be adaptable. There's no single "right" way to achieve equity; your path will emerge as you engage in the practice. Engage actively! Don't just read - reflect and discuss with peers inside or outside your organization.

This is a companion tool to "Building Together: Equity Working Groups", which can be found here. You can also find a Language and Usage Guide at the end of this document as an Appendix. For more terminology support, you can find a guide on Imagine Canada's HR Intervals website.



Considerations Before You Start

Indigenous Experiences

For non-Indigenous organizations, it's important to understand that the concepts of "equity, diversity, and inclusion" do not always—and sometimes never—appropriately account for the experiences, histories, rights, and self-determined goals of Indigenous peoples, groups, organizations, communities, and nations. Indigenous perspectives on this vary. Some may be willing to work with the concept of equity, or an expanded version of it, while others may not. Some may not be interested in being "included" or "represented" within colonial institutions. Some may not consider themselves to be "equity-denied" but rather "rights-bearing".

The first step to working with Indigenous communities is to understand their protocols and who you should direct your request to. Explain your ask, and then, based on their guidance, ask how they would prefer to approach addressing the barriers and harms they face, and their needs, desires, and goals. Ask if they wish to engage in a discussion about what that could look like, whether it's an integrated process or a separate one. If separate, ask how this process might be led, governed by the protocols, laws, and teachings of their communities, and positioned within your organization to ensure it doesn't compete for power or resources with your other equity-related work.

Ellen Gabriel (Turtle Clan, Longhouse from Kanehsatà:ke), referenced the implementation of the United Nations Declaration on the Rights of indigenous Peoples (2007) in her 2011 speech (via KAIROS Canada) when she reminds us that UNDRIP is a "framework to re-institute Indigenous governance, self-determination". Starting off in this way will help you build relationships, consent, and trust with the Indigenous members of your community. And it will set you on course to develop a rights-based and self-determined approach, respectful of the sovereignty of Indigenous peoples.

Systemic Oppression

The word "equity" can sometimes be used, unintentionally or not, in a way that hides the root causes of barriers or systemic harm. Historically, "equity" has involved identifying and removing barriers specific groups face so that they can be included, recognized, and represented inside the organizations and systems that once excluded them. However, if this approach doesn't account for systemic oppression, it can create a situation where barriers may be removed but where harm persists, or where representation improves but **power structures do not change**. Such an approach can replicate the dynamics that created exclusions and inequities in the first place.

This is particularly important for organizations that have not been built by and for systemically oppressed groups to understand and account for. But even for those that are, there is always work that can be done to address the systems of oppression we ourselves may be participating in. To avoid this, it's important that your approach to equity understands that the barriers and harm that Indigenous people, Black and Afro-descendant people, racialized people and people of colour, women and gender diverse people, 2SLGBTQIA+ people, and people with disabilities face are rooted in intersecting systems of oppression: colonialism, racism and white supremacy, sexism and misogyny, homophobia, transphobia, ableism, and more.

If you are curious about different understandings of oppression, here is a useful tool developed by the Centre for Community Organizations in 2018: The Oppression Tree. Another tool is the Power Wheel (n.d.) developed by the Canadian Council for Refugees.

Case Study: Power in Practice

Power is the ability and capacity to influence or direct the outcomes, actions, and decisions of a system. Power in itself is neutral but can be used for both positive or harmful outcomes. While it can sometimes involve force, it is often a more subtle, pervasive force that shapes relationships, organizational structures, and cultural norms. We often focus on representational power (power in numbers), which is useful but frequently insufficient. For equity work to be lasting, we need to look deeper at structural power, the authority and leverage to change the rules of the system itself.

Queer Futures

Imagine there was a small queer arts organization called Queer Futures whose goal is to provide mentorship by and for racialized and queer youth. While the organization was founded by a wealthy older white gay man, the organization's staff have shaped the mission to be deeply rooted in anti-racism and queer liberation. The staff is majority queer and racialized. However, the Board of Directors, which holds the legal and fiduciary control of the organization, is majority white, queer professionals, many of whom have close community ties to the founder.

The Dilemma

The staff develops a critical new program focussed specifically on the intersecting needs of Black trans youth, citing compelling data and community needs. They present the proposal to the Board.

The Board, recognizing the optics, is hesitant to simply veto the proposal. Instead, they express concern about the project's long-term financial viability and even the fear of potential backlash due to loud community members. They argue that the program's “narrow focus” won't appeal to their predominantly white donors. They request that the staff revisit the proposal with a significant reduction in the budget and a widening of scope to not just focus on Black and trans youth.

This scenario highlights the tension between representational power (the Staff's racialized and queer majority) and structural power (the Board's legal and financial control, coupled with racial and class privilege).

Reflection Questions

1. What are the overt ways that power is being used to influence the outcome?
2. What are the subtle or unstated forces at play?
3. What might be the enduring effects of these power dynamics on the organization, the staff, and the community it intends to serve?
4. What specific actions could the staff or board take to address these dynamics? What internal or external obstacles might they face when trying to implement those solutions?

And finally: **How might these dynamics be mirrored within your own organization?**

What is an "Equity Audit"?

Many organizations begin their equity journey by conducting an "equity audit" to assess their current standing. However, the term "audit" can sometimes be misunderstood or misleading in this context. Audits are understood to be a systematic review of organizational systems and structures to assess their accuracy or performance against an agreed upon standard or regulation. There are some pieces of legislation that Canadian nonprofits and charities need to comply with when it comes to equity. Federally regulated nonprofits must comply with the Canadian Human Rights Act, the Employment Equity Act, and the Accessible Canada Act; and nonprofits must adhere to all relevant provincial legislation, including human rights codes, occupational health and safety regulations, labour laws, and pay equity acts.

However, while these pieces of legislation provide an important legal backdrop for assessing equity, there are no standardized or regulated frameworks to help guide or measure equity, diversity, and inclusion in Canadian workplaces. It's difficult to create such a standard for a few different reasons. One is that the legislation listed above **represents the floor, not the ceiling, for equity**. The second is that the ceiling is highly subjective and variable, depending on various factors like where a nonprofit does its work, the type of work it does, and the histories, needs, and desires of the systemically oppressed peoples who live and work there. In reality, the ceiling is not a ceiling at all, but a wide sky full of many different possibilities. This means it's difficult to undertake a standardized audit, let alone build a comprehensive report card, checklist, blueprint, or roadmap from one.

Even if you do manage to undertake such a review, you will face the inevitable challenges of taking action on what you find. In this toolkit we offer another frame to help you to move from audits to action: that of equity as a practice.

Equity as a Practice

Yes, there are times when it's useful to undertake a review of your organization's systems and structures, but it doesn't have to be comprehensive, be undertaken by an independent consultant, or require a huge one-time investment of time and resources. It can be embedded in your existing work and can be led by anyone that is committed to centering the experiences, needs, and desires of the systemically oppressed people you work with; has a mix of relevant lived experiences and technical skills to effectively put equity into action; and, is willing to learn as they go.

An "equity practice" is circular, rather than linear. It's not about following a checklist by rote; it's about being adaptive, taking action, and learning from the experience. It isn't an objective process as much as it is a relational one that is aware of and accounts for differences in power. Over time, you will be able to build a specific and contextualized picture of what equity means at your organization, rather than using a broad, universal definition from somewhere else. It may not be clear or known at first, but the picture will become clearer as you engage in the practice. In this way, your equity practice is not understood as a piece of work that stands on its own and has an end point but as something that is driving your organizational development.

Framework: Shifting Mindsets

In Emergent Strategy (2017), adrienne marie brown quotes Grace Lee Boggs: "'Transform yourself to transform the world.' This doesn't mean to get lost in the self, but rather to see our own lives and work and relationships as a front line, a first place where we can practice justice, liberation, and alignment with each other and the planet."

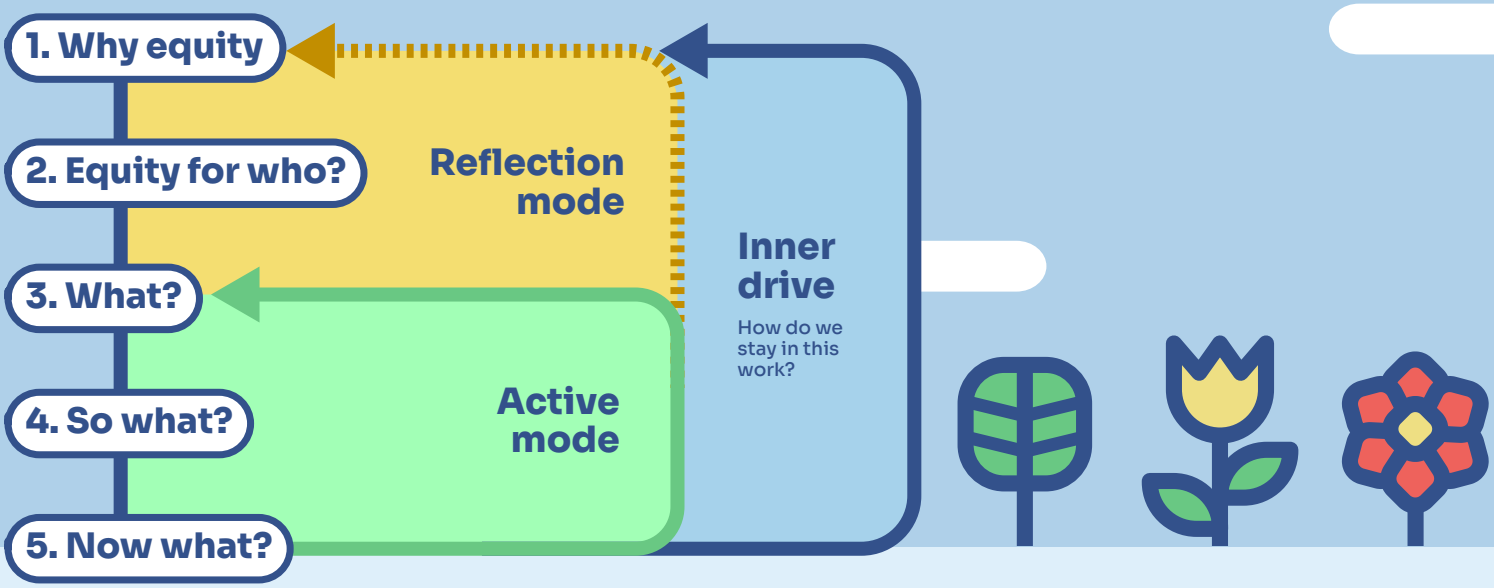
This table is an invitation to explore a shift in mindset - moving from a one-time equity audit to a sustained equity practice. Reflect on the assumptions you may hold about equity work and to consider how a different perspective can lead to more meaningful, lasting change. To support your reflections, you may find the Seeds of Transformation framework, developed by the Tamarack Institute in 2025, to be a helpful resource.

Audit	Practice
Linear	Circular
Check-box	Adaptive
Objective	Relational
Universal	Contextual
Known	Emergent
Stand alone	Developmental
End point	Continual

Reflection Questions

1. What resources, support, or internal dialogue would be needed to support this shift in your team or organization? Or even for yourself?
2. What does "success" look like in each of these frames? How do they differ?
3. How might this shift fundamentally change the way your organization approaches equity, from strategy to daily interactions?

Based on this reflection: **What is one tangible step you can take today to move from an audit mindset to a practice mindset?**



Five Guiding Steps

In this toolkit, we offer you Five Guiding Steps to help you understand what an equity practice looks like.

An equity practice generally shifts back and forth between two energetic modes: a reflection mode, and an active mode. Imagine a fast moving river that is constantly changing the landscape it flows through but that also needs to slow down from time to time by flowing into a wetland, where debris and silt can settle and the water can become more clear.

In the reflection mode, you will think through why equity is important to your organization and what it means to you (Step 1). It also involves developing clarity on whose barriers and experiences of harm you want to address (Step 2). This mode requires a pause and some level of stillness. It's not something you want to rush through but something you want to thoughtfully consider.

The active mode involves taking action on the intentions surfaced in the reflection mode. This mode involves moving through an iterative cycle of asking "what - so what - now what" (Steps 3-5) and taking action based on what you find. Achieving equity requires this active stance, so you can expect to move through this cycle several times before periodically shifting back into reflection mode.

Both modes are powered by an inner drive, like a muscle, that works to keep the practice going. This is possibly the most critical part of the whole process. It is a set of capacities that will help you stay in this work when it gets hard, as it inevitably will. The last section, "How do we stay in this work?" offers tools and prompts that will allow you to take care of yourself and each other, tend to relationships, and stay well while you do this work.

Remember, this rhythm will be unique to every organization and context. For example, if you move through one cycle in 6 months, you may want to pause after 18 months to check-in with Steps 1 and 2 again. The shift of frame from "audit" to "practice" means this pause isn't the end of the process but simply a moment to refine your intentions before you continue again.

1. Why Equity?

Who are you?

The first step in doing an equity audit is maybe not the most obvious one. Before looking at the experiences of the people in your organization, you must first understand who you are—the person or people responsible for leading equity—and how you are situated within the organization. This is called understanding your "social location", and it includes reflecting your role within the organization (e.g., your position in the organizational hierarchy and the level of authority and power you have in that position) as well as the combination of factors that have shaped your life experiences (e.g., your race, gender, sexuality, ability, age, religion, class, etc.).

Taking a moment to reflect on how you are situated will help you decide whether you are the right person or people to be leading this work, whether you have the right mix of authority, lived experience, and skill to do it, and whether you need some collaborators to make the process stronger and more accountable. You may be a single individual tasked with what feels like an enormous responsibility but very little positional and social power. If that's the case, try to find a co-collaborator to help you with this work. If you can, create a working group to help guide you in your work - the companion tool to this one, the "Building Together: Equity Working Groups", can help you do that. The goal is to have at least two people before you start.

What does equity mean to you?

The next step is to define what equity means to your organization. It's not necessary to have a fulsome definition right from the start, that will come with time. But before you begin, you will need a definition, even a loose one, to help guide your activities. The process of coming up with a starting definition of equity with your co-collaborators or with a working group will likely answer a lot of questions to come in this process. It will help you find clarity about why you want to be more equitable and what you want to pay attention to. You will find that your definition, no matter where you start, will be refined over time as you undertake this circular process. Feel free to look at our Appendix on Language Usage for more support in this area.

Framework: Testing Assumptions

Before you move too quickly into actions or recommendations, take a moment to surface the assumptions you're carrying. This should be early in any process that you are undertaking.

List out 5-8 things you expect (or fear, or hope) the audit will reveal to be true. Be honest. These don't need to be shared or validated - they're for you. For example, ask yourself:

- What do I think the core problems will be?
- Where do I already think the harm is happening?
- What do I assume about leadership, about staff, about community?

Once you've done this, step back and notice the patterns. You can build a process that tests for disconfirmation and not for confirmation. Identifying these assumptions can reveal what is missing, highlighting areas where you may need to reconsider your questions or adjust the scope. You may discover that what's missing in your early framing is what eventually becomes the most important part of your process.

Example Assumption	What You Might be Missing
I think the issue is that staff and board do not have a common understanding of equity.	The problem isn't lack of knowledge, but a lack of will and potential minimizing of harm within the system.
I think the leadership is only doing this to "look good."	Attributing issues solely to individual bad faith rather than systemic barriers and capacity issues. Might miss out on potential allies.
I think that there is low psychological safety within the organization.	Framing the issue as current culture only, missing historical trauma tied to past organizational or sector actions.
I think the organization is missing out on qualified equity-seeking candidates because of our hiring process.	Fixing the hiring process but neglecting onboarding or the toxic work environment once people arrive.

Why do you want to be more equitable?

For some organizations, the answer to this question is simply assumed. It might be "because we have to", or "because we know people have experienced harm." But if you take some time to dig into this question, you will find a combination of both principled and practical answers that will help you shape the next steps in this process, as well as explain your work to both internal and external members of your community.

Principled reasons might include the fact that you are obligated to serve everyone in the community; that it's simply the right thing to do because it's a matter of justice and human rights; or, because you value anti-racism, anti-oppression, equity, and belonging in and of itself.

Practical reasons might include the fact that equity is a powerful strategy to better achieve your organizational goals; it helps you reach more people; and, that it makes your organization more creative and better at solving problems (Geronimo, 2014).

Whatever your reasons are, make them explicit and let them help you shape a clear purpose, goals, or objectives for your equity practice.

2. Equity for Who?

Whose experiences do you want to prioritize?

There are many different groups and communities that face barriers and experience harm in the nonprofit and charitable sector. It can be hard to come up with a comprehensive list and even harder to take action to address all of them. Indeed, common traps such as playing "equity pie politics" or "oppression olympics" can stop work on equity before it begins.

The benefit of a circular approach is that you don't have to address everyone's concerns all at once. You can start with those that require immediate tending and continue to build your list of priorities as you iterate through the process. In this approach, intersectionality is a powerful conceptual tool that ensures many concerns are addressed at the same time, as it understands that barriers and harm are the result of intersecting forms of oppression. Understanding this, your efforts to reduce and remove barriers and prevent harm will create greater equity for everyone.

Once you have a sense of whose experiences you want to prioritize, you will also know who needs to benefit from your work on equity. You will know exactly who it is meant to serve and who you need to hold yourself accountable to.

Framework: Cut Curb Theory

The Curb Cut Effect, a concept originating from disability activists in 1970s Berkeley, California, describes how infrastructure changes designed for vulnerable populations can benefit everyone. These activists, who initially created their own sidewalk ramps, discovered that while curb cuts primarily aided wheelchair users, they ultimately provided wider accessibility for all (people with strollers, bikers, etc.). This concept expanded beyond physical infrastructure to include changes in policies, practices, or law to support oppressed groups often leading to societal- or organizational-wide advantages.

Small and Medium Organizations

In the context of small and medium organizations, cut curb theory might look like:

- A flexible work hours policy designed for caregivers and people with chronic illness could support better working conditions for all, reduce burnout and potentially increase retention.
- Plain language documents could be developed for English and French-language learners could support neurodiverse people, reduce ambiguity, long documents and increase clarity for all.
- Accessibility for events such as dietary consideration or a quiet room could support a more welcoming environment and increase attendance.

To explore a similar theory, check out the Targeted Universalism approach developed by the Othering & Belonging Institute at Berkeley University.

Case Study: Toronto Arts Council Equity Priority Groups

In equity work, it can feel overwhelming to know where to start and which groups to center. This example from the Toronto Arts Council demonstrates how specificity and clarity can effectively orient your work and resource allocation.

The Equity Why

The Toronto Arts Council, the city's public arts funding body, developed its Equity Framework in 2017 to address deep, systemic inequities that had historically marginalized certain communities. This commitment was driven by the desire to ensure full inclusion in their programs and better fulfill their city-wide mission. They view equity as a continuous process, describing the Framework as a "living" document that is regularly updated in response to the sector's shifting needs.

Strategy: Explicitly Naming Priority Groups

To move from general statements to actionable change, the Council adopted a clear strategy: explicitly designating Equity Priority Groups, stating that these communities are prioritized because of historical marginalization, and specific equity measures have been adopted to ensure their full inclusion in funding programs and operations. This includes indicating they may shift their roster of designated groups as the arts sector evolved, tracking local demographic shifts.

Structural Commitments

To support this focussed equity work, the Council developed concrete, structural changes, including:

- **Data collection:** Committed to tracking funding to various communities by collecting detailed demographic information.
- **Governance:** Created a standing Equity Steering Committee.
- **Evaluation for granting:** Increased the weighting of the equity implementation score in operating grants.

Reflection Questions

While the council is likely a much larger organization than your own, there can be insight drawn from their work.

- How clear is your organization about whose experiences it is prioritizing right now? Whose it isn't?
- What demographic details are available to you about service users, staff, etc.? About the town or city that you are in? How do things compare?
- Whose stories do you hear the least?

Whose experiences do you want to better understand?

When you start working on equity, you will first want to understand how things are going for people in your organization; how are they feeling, how are they relating to you and each other, what are they experiencing? There are many people you can ask about this: staff, board, volunteers, service users/clients, partners, members of the community, etc. Defining your initial scope is crucial because the list of potential interviewees could be endless. It is also important to reach out beyond the usual players to community champions and advocates who are not regularly called on.

Again, the circular approach means you can start in one place and grow your scope as you go. You can start by talking to your staff, or to participants in your programs, or to those involved in governance. It doesn't matter where you start, but it will be important to eventually look at all aspects of your organization to ensure equity is embedded throughout.

3. What?

Once you are clear on why you are doing this work and who you want to prioritize and be accountable to within it, you are ready to start taking action. This section will help you identify what you need to start working on.

What do you already know about their experiences?

Nonprofits can be quick to want to reach out to people, because you understand the importance of community outreach, consultation, and engagement. But if this is done reflexively rather than thoughtfully, it can be extractive and re-traumatizing.

> **Trauma mining:** the process of creating an environment that demands that Black people, Indigenous peoples, women, Disabled people, members of the LGBTQ2S community share experiences of discrimination. This process is branded as necessary for the moving forward of an organization in its journey to become more equitable. However, it serves no purpose to those who are forced to relive their trauma, but attempts to prove to their colleagues that racism, sexism, ableism, homophobia, transphobia, etc. is in fact real.
>
> **– Sharon Nyangweso in Trauma mining: Do you really need that "tough conversation" (QuakeLab, 2024)**

So the best place to start is to ask yourself what you already know about the barriers and the harms they experience. You likely have enough evidence to start your work on equity with. You can draw from:

- direct feedback or complaints you've received
- incidents that have happened
- surveys of staff or community members
- data on staff turnover
- things said in exit interviews
- anecdotes you've heard

You can also refer to existing research and resources in your locality and in your sector to know more generally what people are experiencing. Look into what's been published by the following places to fill your picture out:

- your municipality
- your provincial government
- your human rights commission
- local universities
- sectoral associations
- local organizations run by and for systematically oppressed groups
- funders

Another way of looking at this is: **What data do you already have and what data do you need to get?**

What more do you want to know?

If you still feel you need to know more about your specific community, define what those things are and why they are important to you. You may want to know as much as possible, but again, the most equitable thing to do is to only ask about things you can meaningfully make sense of and respond to. Equity is about action, not just about listening.

When you are deciding on what you want to ask people about, take a desire-based approach first, and ask about their priorities, goals, and dreams. Achieving equity isn't about raising the floor of people's experiences but raising and even removing the ceiling of them too. While it is important to understand and address needs, barriers, and experiences of discrimination, harm, and violence - which is the focus of a deficit- or damage-based approaches - ensure your inquiry is balanced with desire and possibility.

Collecting this information can be beneficial to the organization in multiple ways. According to the study Shifting Power Dynamics: Equity, diversity and inclusion in the nonprofit sector (2023), organizations frequently use their equity-related data for a variety of purposes, including developing new programs, organizational strategy, reporting to funders and revising programs.

Frameworks: Moving Between Yes and No

The method for gathering insights profoundly affects the information revealed. This section details two distinct methodologies for understanding organizational dynamics: Appreciative Inquiry, which focuses on strengths and successes, and Deep Democracy, which surfaces and integrates resistance. Though both are more complex than outlined, these approaches can guide question development for surveys, interviews, or focus groups.

Appreciative Inquiry	**Deep Democracy**
When was a time you felt the most seen, valued, and effective in this organization?	What part of the system is feeling resistance to this change right now? What does this part need to come along with this process?
What are the essential strengths of our culture that we must carry forward?	What does the unheard voice need to feel safe and supported?
Describe a moment when we were at our most equitable and why.	If you could say 'no' to one thing in this process, what would it be and why?
What are your priorities, goals, and dreams for this organization?	Does anyone else feel differently?
How would you know this work was successful?	What feels unnameable within the organization?

Appreciative Inquiry is often the better approach when your goal is to build momentum, vision, and a sense of possibility, especially in a context with relatively high trust where participants are ready to envision a desired future state. Conversely, Deep Democracy is better when trust is low, tension is high, or significant systemic harm and conflict need to be addressed. It can help release some of the steam, and help the perspectives that haven't felt heard, heard. All this being said, it can sometimes feel riskier to surface resistance so consider this when choosing your questions.

How can you ensure people are safe enough to share their experiences with you?

There are many different ways you can begin to ask people about their experiences, but you will want to make sure that the process of asking them is as equitable as the outcomes you hope to achieve. Remember that there is often a power imbalance between who is asking and who is being asked, so you will need to be aware of this and try to mitigate the impacts of it as best you can.

Principles to Guide You

Transparency: Clearly communicate the process, timeline, purpose for sharing, sharing methods (e.g., consent, confidentiality, formats like focus groups, surveys), and how the organization will respond to findings.

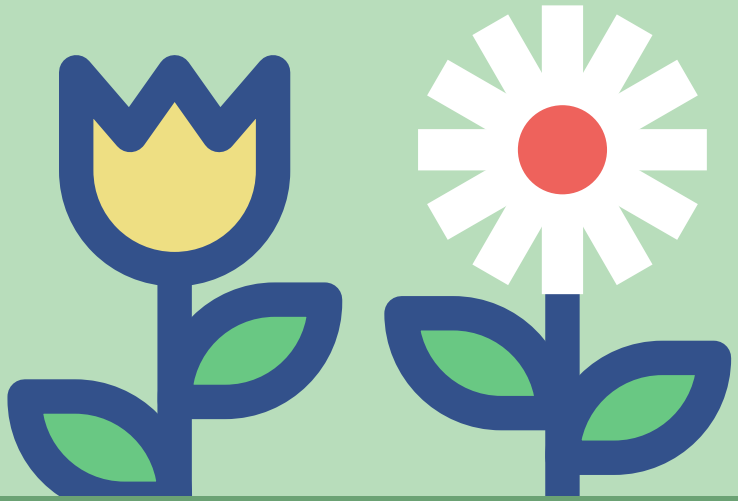
Safety: Employ trauma-informed invitations and activities. Include opt-in/opt-out options at all stages. Ensure affinity spaces are led by people with similar lived experiences. Avoid introducing unnecessary power dynamics (e.g., leadership presence) that might influence sharing. Offer support pathways to process feelings.

Accessibility: Reduce barriers by offering honoraria, food, childcare, transportation, translation, and accommodations. Consider diverse meeting times (evenings/weekends) and formats (online sessions, voice notes).

Accountability: Be honest about your goals and purpose. Take responsibility for past/present harms. Explain how the organization will be accountable for what it hears and how the community can hold them accountable.

Relationality: Recognize this as a relational process - an opportunity to strengthen or repair existing relationships, build new ones, and care for those who have felt unseen or uncared for.

If you can't be as transparent, safe, accessible, accountable, or relational as you'd like to be, **the most equitable thing to do might be to not engage people directly** and use existing information to take action, deferring a more direct process until you can ensure it will honour these principles to a reasonable degree.



When Considering Confidentiality & Anonymity

Whether it's a survey, interview or focus groups, it's important to understand how you will take care of your data and the stories that you gather. When collecting sensitive information, especially stories of harm and inequity, the terms confidentiality and anonymity are powerful tools that can feel like obvious defaults. But they can be overpromised, leading to mistrust and risk. Handling confidentiality and anonymity ethically requires balancing the need for safe disclosure with the practical limitations of data collection, especially in small organizations.

- **Confidentiality:** The identity of the source is known to a specific group collecting the data but will not be disclosed outside of that group. This means: "We know who you are, but we won't tell anyone."
- **Anonymity:** The identity of the source is unknown to the audit team and all other parties. This means: "We cannot connect your story back to you."

In smaller organizations and spaces, true anonymity is nearly impossible, and over-promising confidentiality can be difficult to uphold.

Ask yourself (or in small groups):

- How can you ensure that stories, even when names are removed, do not inadvertently identify the source to others within the system? For instance, a detailed narrative (e.g., "The only woman of colour in Department X noted an issue on the project led by Y") can easily lead to identification.
- What is the minimum threshold for aggregating and disaggregating data to prevent accidental identification?
- What methods can be integrated into the process to ensure ongoing participant consent and comfort levels?
- What are the legal or ethical obligations that might require a breach of confidentiality, and what procedures are in place for responding to stories that indicate a significant safety risk?

Respectful Disclosure

Instead of promising what you can't guarantee, focus on transparency about your process.

- **Be explicitly clear about limitations:** Before any interview or survey, define exactly who will have access to the raw data (e.g., "Only the three-person audit team") and what data will be shared with the broader system (e.g., "Only themes and aggregated quotes"). Some provinces have specific privacy laws, such as Law 25 in Quebec. Know the context in which you are doing this work.
- **Define the tipping point:** Tell participants what happens if their story is highly unique and identifiable. Will you remove the quote? Will you check back with them for permission to use an edited version?
- **Offer self-selecting disclosure:** Give participants the option to indicate if their story is "off the record" and for context only and cannot be used in the analysis or reportback or if it can be used only when aggregated with other similar comments.
- **Protect the narrative, not just the name:** When presenting findings, combine individual accounts into composite stories and themes to protect the source while preserving the truth and emotional weight of the experience. An example of this in video format: Walk with Me: A Woman of Colour's Journey in Nonprofit Organizations.

The goal is to respect the storyteller, ensuring their contribution benefits the system without risking their well-being.

How can you make the process itself benefit the participants?

Another way to mitigate the extractive and re-traumatizing nature of this kind of engagement is to ensure the process itself benefits the participants, regardless of what you and your organization do afterwards. This includes a commitment to data sovereignty and ethical data governance. For example, when working with Indigenous peoples, it is essential to embed the principles of OCAP (Ownership, Control, Access, and Possession) to ensure that communities and individuals govern their own information as much as possible. A commitment to equity requires ensuring all participants can access the data (notes, transcripts, etc.) they share if possible, understand its intended use, and are aware of their rights and the limitations regarding data removal requests.

Affinity spaces like peer-to-peer conversations, Employee Resource Groups, or ceremony or listening circles guided by Elders, for Indigenous folks, can be a safer way for systemically oppressed individuals to share their experiences than through traditional focus groups and surveys. Talking with other people who share similar (though not exactly the same) experiences of systemic oppression can be validating and healing for participants. Such spaces can create time and space for participants to process their sometimes complicated feelings about your organization. They can also create a greater sense of confidence and belonging, allowing participants to build supportive relationships with one another.

These formats will require your organization to be patient about receiving recommendations. They should not be burdened with that responsibility from the start. They often need time before they are ready to do this kind of work. If and when the participants are ready—and willing—they can be invited to come up with recommendations for the organization.

Framework: Finding the Balance

In any organizational change effort, you need a balance between technical skills - the “what”- and adaptive skills - the “how”. For example, knowing how to develop a survey vs. holding space for the difficult stories you will hear. Over-emphasizing one at the expense of the other can stall progress. If you're not sure where to begin, developing these skills is a great first step toward creating more effective and sustainable change.

Technical Skills	Adaptive Skills
Using data collection tools (surveys, forms)	Holding space for discomfort and uncertainty
Organizing and analyzing feedback data	Adapting approaches based on emerging needs
Policy development	Building trust through transparency and vulnerability
Implementing step-by-step action items	Navigating and normalizing feedback and critique
Facilitating structured dialogues	Practicing empathy and active listening

4. So What?

Once you've collected your data, the next step is to analyze it to understand the stories, patterns, and themes that are present within your organization. This process, known as **"sensemaking,"** is about determining what the data means for your organization. Remember, an equity practice is a continuous feedback loop rather than a distinct, one-time event, so take your time building your skills and tools based on what you need and what makes sense for where your organization is.

How can you make sense of what you've heard?

Here are some suggested steps for how you can start to make sense of what you've heard.

- **Review and organize:** The first step is to review everything - also known as your data - that you've collected. It can be overwhelming, so it's helpful to do this with at least one other person to mitigate biases as you sort through the information. The goal of this initial scan is to help you organize the information into a more usable and digestible format. Ensure there is a mutual understanding of the confidentiality of this process. Having access to this unprocessed data can potentially put members of your team at risk, especially if they are raising important critiques.
- **Synthesize and find themes:** Look for recurring themes in the experiences people have shared. Group similar feedback to identify the most pressing issues, such as common challenges, barriers, and aspirations. You can disaggregate what you've collected along different lines (e.g., race, gender, etc.) to see if there are any differences between groups. Additionally, you can undertake an intersectional analysis by looking at how and where group experiences overlap and where they don't.
- **Identify items for confidential and immediate action:** Sometimes, processes like this can surface specific instances of discrimination, harm, harassment, and abuse that need to be responded to immediately and sometimes have a legal responsibility. They can flow through formal processes like an HR complaints procedure (if there is consent for this), or they can be brought to leadership. Either way, it's important to center the needs of the person or people that were harmed. Far from being a distraction in the process, addressing these instances can create a powerful opening in your work on equity and may end up being your first full cycle through the process.
- **Analyze and validate:** Consider how different sources of information-like interviews, surveys, and brainstorm sessions - support or contradict each other. It's also useful to go back to the participants to review and validate your interpretation of the themes, as this helps them feel ownership of their stories and builds trust. This validation isn't just about confirming findings; it's as much about disconfirming your interpretations and co-creating meaning and shared understanding with those most impacted.
- **Identify what's missing:** As you analyze the data, note what still feels like it's missing from the picture. This can also be done with the participants. Go back and get more information if you need to, but also be willing to move forward, even if you don't have a complete picture. Again, you will often know more than enough to start taking informed action.

No Bad Apples... Except When There Are

Equity work often forces us to balance the need to fix a **broken system** and the need to address the harm caused by **specific individuals**. The phrase “There's no such thing as a bad apple; there's a rotten barrel” reminds us that when an organization consistently produces unfair or harmful outcomes, the problem is usually rooted in its policies, culture, and structures and not just one person. In some situations, people can become the scapegoat for broader organizational issues.

Toxic behavior often flourishes because the system allows it, rewards it, or fails to stop it. Focusing only on “bad apples” is a distraction that protects the power structure from necessary change. However, the data you collect will sometimes identify specific instances of harm, harassment, and abuse committed by individuals. It is important that this is directly addressed while also addressing the structural gaps in the long term.

How can you emotionally process what you’ve heard?

You might hear stories and surface findings that may make you very uncomfortable. Indeed, if your process was equitable, **you will hear things people have been unwilling to share openly before**. Create spaces for you to reflect on what you’ve heard and process your feelings about it so that both defensive and aggressive reactions don’t sideline your work. There’s more on this in the last section.

Case Study: Sensemaking in Practice

Sensemaking is not just an internal process of grouping data; it is an opportunity to demonstrate to your organization's members that their voices have been heard. It also is an important moment to validate your findings and for participants to correct or add to your initial theming.

Context

A medium-sized food bank was tasked with improving services for older, aging service users, especially those who were non-English or French speakers, to improve access and address systemic barriers. Despite a long history of consulting its members, the organization found it difficult to hear from these community members, and those that did expressed widespread "consultation fatigue" amidst their life circumstances and a persistent feeling that their feedback had been historically ignored or met with "organizational defensiveness."

The Sensemaking Process

The initial data was gathered through interviews and workshops. After this, the core team members tasked with this project, clustered findings into a series of recurring themes:

- **Lack of culturally relevant food:** Food that was relevant to specific dietary traditions, religious requirements, and health needs of specific communities was lacking.
- **Ageism and infantilization:** Experiences of being dismissed by volunteers and staff at food banks or being treated like children.
- **Invisible language barriers:** Volunteers and staff frequently spoke to older and aging non-English/French users in a louder tone, creating feelings of disrespect and rushing the interaction.
- **Digital referral barriers:** When older and aging members were referred to other community organizations for additional support, they often encountered several barriers. These organizations frequently provided most of their information online, lacking a phone number for direct contact. Furthermore, language barriers were common. Consequently, individuals were compelled to rely on family or neighbors, which resulted in a loss of privacy and autonomy.

The project team involved community participants in a workshop where they were presented core themes rather than receiving a finalized report and recommendations. Transportation, food, and translation services were provided for all participants to ensure their access to the space. The coordination of the session was also done by phone calls and not by email.

The Shift from Audit to Practice

During this session, the team presented the distilled themes and supporting quotes (anonymized, but recognizable) back to the participants. This served two critical purposes:

1. **Validation:** Community members were invited to analyze, correct, or add to the findings.
2. **Co-creation:** Once the themes were affirmed, the energy in the room immediately pivoted from describing problems to designing solutions.

This created a shift. The participants were no longer passive data providers; they were collaborators with deep institutional knowledge.

Reflection Questions

- How could your organization adapt a sensemaking process to include community validation?
- What assumptions do you hold about your organization or collaborators that a co-creation process might disconfirm?

In the next section, “now what,” we will continue this case study.

5. Now What?

Now you have listened, reflected, collected a bunch of information, and you've made sense of what you heard. That alone is significant. But now you're likely facing the question, what happens next? Now what?

This section is about taking the insights from the sensemaking phase and turning them into a responsive plan of action. It's about moving from understanding to doing in realistic and impactful ways. It can be tempting to create a rigid, pre-determined plan; however, ideally you will create a flexible strategy that can be continuously refined as the organization learns what works. The actions you take are not just solutions but experiments to test hypotheses about what will lead to greater equity.

Where should you start taking action?

The first thing to do is to prioritize your actions. You cannot address everything at once, so decide on the most critical issues to tackle first. Consider both what is most urgent and what is most feasible with your current resources and capacity. It can also be useful to focus on the things you already have to do, like hire a new staff person, start a marketing campaign, recruit a board member, or establish a new partnership. You can even pick a single process, practice, or interaction that feels meaningful and within your sphere of influence. For any of these, you can ask:

- How might we try something different here?
- Who can we bring into this conversation?
- What would it look like to learn from this, not just implement it?

Remember that an equity practice is premised on the idea that starting small and moving through the cycle quickly can be more effective than publishing a comprehensive audit report or writing a new slate of policies. Things like that can be important, but they can also delay organizational accountability and healing. Let small actions be your starting points.

Case Study: Taking Action

This continues the case study we explored above on sensemaking. During the participant workshop, numerous solutions were identified. However, the project team, had additional understanding of backend constraints and resource limitations compared to service users and needed to undertake additional work. The solutions proposed by participants illuminated the types of interventions that would benefit the community. This enabled the project team to develop these ideas into actionable items and present back several prioritized solutions.

It's also important to acknowledge that participants may suggest ideas that are resource-intensive, inappropriate, or unfeasible. In such cases, it is crucial to recognize the underlying need and insight, and to communicate any constraints with compassion and honesty.

Theme	Initial Action Taken	Communication to Participants
Lack of Culturally Relevant Food	A staff member was immediately tasked with contacting existing suppliers to determine the availability and affordability of specific, community-identified grains and staples.	Participants were informed that this investigation was underway and that a small, culturally-specific pilot order would be placed within the month.
Invisible Language Barriers	Staff's language skills were collected and documented. This information was immediately integrated into the planning for future shifts and future volunteer and staff recruitment.	Participants were told their languages would be prioritized in upcoming volunteer orientation and hiring rounds.
Ageism and Infantilization	Staff and volunteers were collectively made aware of the dynamics of being rushed and dismissed. The Volunteer and HR Coordinators collaborated on integrating better practices and norms around this in their onboarding practices.	Participants were informed about the shifts and where to go if they experienced this behaviour again.
Digital Referral Barriers	The food bank began organizing initial conversations with key community partners to discuss the digital barriers and lack of phone contact identified by the participants.	Participants were thanked for identifying this systemic issue and assured that long-term, multi-organizational solutions were being explored.

Reflection Question

The commitment to an equity practice is premised on the idea that starting small and moving through the cycle quickly is often more effective than delaying action for a comprehensive report. **What single, easy step could your team take right now to address the most urgent theme identified in your data?**

How should you start taking action?

The work of equity is often misunderstood as being about building awareness and knowledge, about feeling compassion and empathy, and about changing hearts and minds. Often, organizations see their work on equity be primarily or even only about training people. To be sure, trainings are important, especially to build a common frame and language about equity in your organization. But, it is also well known that trainings are an inadequate tool for change. Equity as a practice requires taking action at the structural, cultural, and relational levels of an organization, not just the individual level. Being equitable is about organizational development more than individual development and thus requires a specific set of skills and actions.

"Equity work inside institutions requires a different set of competencies. These include process design, policy development, operational analysis, governance structures, procurement systems, budgeting frameworks, and HR practices. It requires not only an understanding of how power works in society, but also how it is codified, distributed, and protected within the specific environment of an organization. You have to know how decisions are made, how authority flows, and how performance is measured. The ability to name structural harm is essential, but so is the ability to redesign workflows, identify bottlenecks, align incentives, and restructure accountability. Without those technical skills, equity work often stalls at the level of values or awareness."

– Sharon Nyangweso in Four Things We Were Wrong About (QuakeLab, 2025)

This can look like making a small change to a frequently used policy, procedure, or process in response to what you've heard, seeing how it goes, then improving iteratively. It can also look like taking a different approach to larger, more consequential structures, like financial management, strategic planning, and board governance. Either way, it's important to remember that systemic oppression is a structural phenomenon and thus requires action at the structural level.

Frameworks: Assessing Your Organization

There are many tools available online to help nonprofits assess the health and needs of their organization. These are two tools that we have found useful in our work. They use metaphor to help organizations map different components of their organization such as funding etc.:

The Healthy House

The Healthy House organizational assessment tool was developed originally by The Centre for Community Organizations based in Montreal/Tiohtià:ke.

It encourages a wholistic review of an organization's health by breaking down its components into distinct, interconnected areas—like the foundation, rooms, and roof of a house. This model helps organizations identify where they are strong and where they need to invest in improvements to ensure long-term stability and effectiveness.

The Onion Tool

The Onion Tool was developed by the CommunityWise Resource Centre in Mohkinstsis/Calgary. CommunityWise adapted the original "onion" concept from INTRAC (International NGO Training and Research Centre) to create their own framework.

It provides a visual guide to where change efforts should be directed, illustrating that surface-level changes are insufficient for deep, systemic transformation. The tool is structured in concentric circles (layers of an onion), moving from external, visible elements to deep, internal, and invisible elements.

Equity also requires action at a cultural level. Organizational culture is often unwritten and intangible. As the saying goes, "culture eats strategy for breakfast", so this is a critical site of action. This can look like creating a process or structure in which your organization is able to name the cultural norms and unexamined assumptions that make up your organizational culture, or the places where your organization behaves differently than they say they do on paper, and take action to mitigate or transform those that are getting in the way of achieving equity.

And finally, **taking action always means taking care of relationships**. It is very possible that stories of harm may have surfaced through this process, so your response must involve addressing any harm that has been caused. It's also possible that this process helped you build new relationships or strengthen old ones, both of which will require on-going nurturing. Be prepared to receive constructive feedback and criticism, and equip your team members to address it proactively. Develop robust support structures to help your team navigate these situations. In some instances, it may be necessary to gracefully release relationships and allow people or communities to exit with dignity.

Rather than putting the onus to individuals to take care of these relationships, create a process or structure in which relationships are actively tended to. This could be through changes to policy, performance management, or creating spaces for healing and dialogue.

How should you communicate your plan of action?

Be transparent with your community about what you heard and what you will do about it. This accountability is crucial for building trust and showing that the process was not merely an exercise. You can tell your community everything you've learned from Steps 1 through 5, including what equity means to your organization, why you are committing to an equity practice, and who you are prioritizing in it. You can tell them about the process you've undertaken to understand what needs to be addressed—internally and externally—and how you'll start addressing it. And you can share how it's going and what you're learning along the way.

It can be vulnerable to be this transparent, but it is also a strength. **The ability to "learn in public" can go a long way to demonstrate your commitment and earn trust.**

When should you return to Steps 1 and 2?

Your equity practice will involve moving through an iterative cycle of asking "what - so what - now what" (Steps 3-5) and taking action at each step. As mentioned before, this rhythm will be unique to every organization. If you start with small actions, you may need to move through the cycle several times before returning to Steps 1 and 2. If you take on larger actions, it may be worth pausing to reflect after one or two cycles. Either way, pay attention to the rhythm that emerges for your particular organization, and return to Steps 1 and 2 when you feel ready to revisit and renew your purpose for this work.

Just remember that it will be easy to go around the cycle once and think the work is over, or mistake resistance and slowness in the midst of the process as signals that the work is done. The next section offers guidance on how to continue to move through the work even when it feels hard.

How Do We Stay In This Work?

The reality of putting equity into practice is that it challenges the status quo and will provoke resistance at multiple different levels: within yourself as individuals, within your organization, and within society more broadly. **It's common to feel resistance, burnout, or a need to pull back. Rather than viewing this as a personal failing, consider it a source of wisdom.** Your body and mind are telling you something important. Deep Democracy is a conflict engagement methodology, and one of the core concepts it works with is this idea of "resistance".

- **Resistance is a signal:** It indicates that a voice, role, or perspective within a person, group, or system is being unheard, excluded, or suppressed.
- **Resistance is a resource:** It holds the missing information or necessary energy that the system needs to become whole, complete, and move forward effectively.

The goal is not to eliminate resistance, but to listen to it and integrate its wisdom. When you notice resistance, stop and ask yourself:

- What part of me is feeling this way right now? This could be in thoughts or feelings in your body.
- What does this feeling need from me to feel safe and supported?

Even at the best of times, putting equity into practice may feel like trying to swim upstream: Sometimes you'll get ahead, sometimes you'll fall behind, and sometimes you might feel like you are staying in one place. At the worst of times, you may face backlash that threatens to stop your work entirely.

So how do we stay in this work? This section is not about building a plan for the next 5 years. It's about learning how to hold your equity practice, to stay with it and adapt, even when things get bumpy. Think of this not as a conclusion, but a developmental muscle to build so that you can deepen your circular practice, sharpen your technical skills, experiment a bit more, build adaptive capacities, remain accountable to your original intent, and take care of yourself and others when things get tough. As mentioned in the Introduction, this is possibly the most critical part of the whole process.

Revisit Your Why

The most grounding thing you can do when you face resistance or backlash to your work on equity is to remind yourself and your organization why you are doing this work. Step 1 offers ways for you to surface and articulate your "why". When you have a clear definition of equity and what it means to your organization, the assumptions you're holding about it, and an explanation of why it's important to your organization, you can always refer back to them to re-ground yourself and others. **At its most powerful, equity should be a strategy that helps your organization more effectively advance its mission and vision**. In this way, it can be a steadying force when you face rough waters.

At any stage in your equity practice, you can re-visit your definitions, assumptions, and explanations. This might be necessary when difficult tensions and conflict arise. Equity work is inherently unearthing. When tensions arise, when people critique the process, question your intent, go back to your "why":

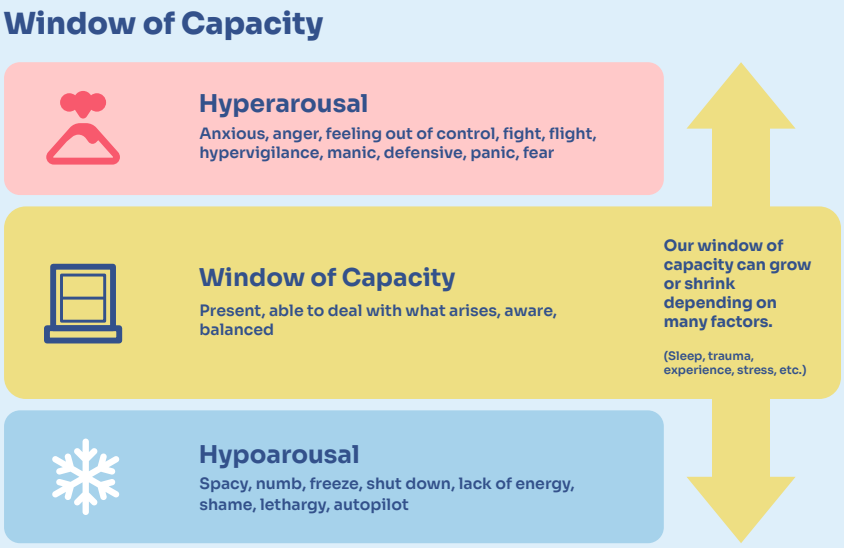
- What was the mandate for this work?
- Is it still clear? What has shifted?
- What do you see now that you didn't when you started this process?
- What is different now from where you started?

Sometimes clarity returns only when we pause and reflect on these questions. Your mandate doesn't have to be perfect or final, but it should be honest. Let it guide what you do, and just as importantly, what you don't do. Remember this is a circular process.

When Criticism (Inevitably) Shows Up

Even when you are grounded in a solid "why", it can be hard to receive criticism about your work on equity. No matter what the criticism is about, it's important to take a moment to check-in with yourself and your body and take care of yourself before you respond. This is especially important if you are yourself a member of a systemically oppressed group. This is not about being "respectable" or "civil", a common phenomenon where systemically oppressed peoples are expected to tamp down their anger and maintain the comfort of those who are not systemically oppressed. This is about staying regulated as much as possible and to be well while you do this work.

Framework: Window of Capacity



As you navigate these next steps, it can help to think about your "window of capacity" or "window of tolerance." This is a concept developed by Dr. Dan Siegel (1999) to describe the zone where you can hold challenging conversations without going into overwhelm or shutdown. In our experience, our nervous systems reflect what is happening organizationally and vice versa. Sometimes an organization is in a state of hyperarousal - lots of urgency, funding cuts, conflict, stress, and reactivity - which can make the window of capacity smaller. Other times, it's more in a hypoarousal state, low energy, disengagement, or fatigue.

Reflection Questions

- Where are you personally in your window of capacity?
- Where might your organization be? Are folks ready for hard conversations, or do you need to create a little more space and support first?
- What helps you stay or return to your window of capacity?

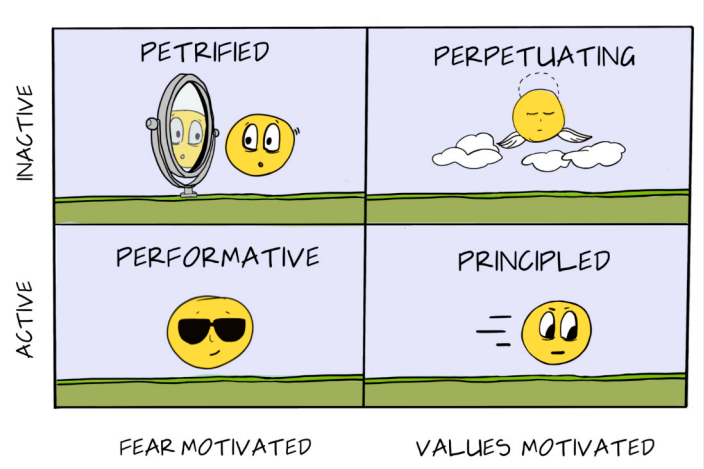
Once you are in your window of capacity, you will be in a better position to consider what the criticism might be telling you about the system you are working in. Sometimes, criticism is a form of fragility (DiAngelo, 2011). Sometimes what feels like pushback is actually the answer to a better question you haven't asked yet. Not all criticism is a personal attack. Some of it is the data you need most.

When criticism or call-outs emerge about the process, don't rush to defend. Instead, pause, take a breath. Practice discernment and consider:

- Is this showing me where the process needs repair?
- Is this revealing a gap in consent, relationship, or clarity of process?
- Is this feedback a gift I can learn from?
- Is this something I can equitably respond to?

Organizations and Anti-Racism Tool

This tool, developed by the CommunityWise Resource Centre in 2021 as part of their Anti-Racist Organizational Change (AROC) work, provides a framework for understanding an organization's developmental stage in anti-racism. It helps organizations identify where they are - from being frozen by fear to actively enacting change. While this tool addresses anti-racist organizational change, it can also be used with broader equity work.



Reflection Questions:

- Where would your organization currently place itself within these four states, and why?
- What are the key indicators that would signal a shift from one stage to the next for your organization?
- What resources (internal or external) does your organization need to move towards being a "Principled" organization?
- How might this tool illuminate your organization's response to other experiences of oppression?

Break Isolation

Staying in this work is particularly hard if you are holding it largely on your own. Even if you have a small group of collaborators, perhaps even an Equity Committee or Working Group, you may find that some of you become more and more isolated from the larger organization. This is a common dynamic, where a person or group of people become a kind of scapegoat for the challenges and failures of your organization's work on equity. They become the problem. This is especially true for people who face multiple forms of oppression such as Black, Indigenous, and racialized women and femmes.

Framework:
The “Problem” Woman of Colour Tool

In 2018, the Centre for Community Organizations developed a tool detailing the isolating and burning-out experience of women of colour doing equity work. The tool maps the common, harmful trajectory where a woman of colour is hired, faces structural racism and microaggressions, attempts to address the issue, and is then retaliated against and labeled “the problem.”

This tool provides a shift in focus from an individual's “poor performance” to a structural failure of the system. By explicitly recognizing this pattern of blaming the messenger, organizations can take preventative action to ensure that the work of addressing equity challenges does not rest solely on the shoulders of the most systemically oppressed individuals.

Reflection Questions

- How might your organization inadvertently contribute to the “Problem Woman of Colour” dynamic?
- How can your organization proactively ensure that the responsibility for addressing equity challenges is shared across all levels, rather than falling disproportionately on systemically oppressed team members?

Whether this is a perception or a reality, or perhaps a mix of the two, it is important to try to address this dynamic as early and as often as possible. As mentioned in Step 1, it’s important to bring other people in this work, both to ensure you have the right mix of authority, lived experience, and skill to do it, but to also spread the responsibility of doing it.

Every person in your organization, from the board to volunteers, should know their role in your organization's equity practice. Enrolling them is critical for long-term commitment. Leadership must communicate the organization's “why.” Champions at every level can guide peers. Structures like job descriptions, reviews, and plans can reinforce equity's importance. Invite others in slowly and intentionally. Your equity practice will ultimately fail if it rests on the shoulders of one or a few individuals. No one person should feel like they are holding up the entire thing on their own. If you are beginning to feel isolated in this way, or that others are becoming disengaged from the work, it may be time to return to Step 1 of this process.

Holding Paradoxes

Engaging in equity as a circular, not linear, practice will introduce several uncomfortable tensions. This kind of discomfort may feel like a signal that your equity practice is not working or is failing. It may give detractors a reason to minimize, sideline, or abandon your efforts. When this comes up, try to identify the tension and see if it's a paradox that you may need to hold as you move through your equity practice.

Framework: Holding Paradoxes

Aftab Erfan, while working at UBC, once explored the importance of understanding our organizational paradoxes. Sustaining authentic equity work demands more than action steps and policies - it requires the willingness to grapple with inherent organizational tensions. The most powerful approach is often to cease attempts at reconciling opposing truths and simply hold them in coexistence.

This is true...	...and so is this
We've done all that we can around EDI.	We've only just begun.
It should feel resolved.	It will never be fully resolved.
What we tried didn't work.	That failure is what's showing us the way.
Audits can create psychological safety.	Audits can also re-open wounds.
Everyone needs to stay for change.	Some people need to leave for change.
We seek accountability.	We resist the urge to punish.
This process should bring closure.	This process will crack something open.
We don't need more equity training.	People need baseline equity knowledge.

Reflection Questions

- What are your organizational paradoxes?
- How can we embrace these tensions in our work?

Reflect as You Go

Each step of this equity practice is an opportunity to reflect on where you've come from in order to decide on where you will go next. Your actions don't need to be perfect to be powerful - but they should be reflective. At each step of this process, you can ask:

- What are we learning?
- How are people responding?
- What unintended consequences are we noticing?
- What do we need to pause, refine, or let go of?

In this way, your equity strategy becomes developmental. That is, not fixed, but flexible. Not top-down, but alive and responsive. There will always be things you cannot change based on where you are at, and where the organization is at. There might be power you do not hold. Wounds you cannot heal. That doesn't mean the work was for nothing. Building a reflective practice will allow you to understand this in a powerful and tangible way.

If you have the resources, investing in learning-focussed evaluation can help you take stock of the work you've done. But your reflective practice does not need to take a lot of time or money. It can be check-in or check-out questions at meetings. It can be a moment of journaling or self-reflection before an important conversation. It can be a listening circle after a big piece of work is completed. There are many ways to be reflective, and each offers important evidence that can inform the next steps of your equity practice. For more information on evaluation and reflection practices, you can see our companion tool, the "Building Together: Equity Working Groups."

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- The “Problem” Woman of Colour in NonProfit Organizations (The Centre for Community Organizations, 2018)
- Trauma mining: Do you really need that “tough conversation” (QuakeLab, 2025)
- Seeds of Transformation: A Loving Framework for Equity (The Tamarack Institute, 2025)
- Shifting Power Dynamics: Equity, Diversity and Inclusion in the Nonprofit Sector (Imagine Canada, 2023)
- Walk with Me: A Woman of Colour's Journey in Nonprofit Organizations (The Centre for Community Organizations, 2020)
- Walking on the resistance line: What if resistance was a pathway to wisdom? (Cedric Jamet, 2024)
- White Fragility (Robin DiAngelo, 2011)
- White Supremacy Culture in Organizations (The Centre for Community Organizations, 2020)
- Why Doesn't Diversity Training Work? The Challenge for Industry and Academia (Frank Dobbin and Alexandra Kalev, 2018)

Appendix: Language and Usage Guide

For descriptions of the different terms and language we are using in this tool, and what might help your organization choose the right language for them, please feel free to refer to our “Appendix: Language and Usage Guide”.

IMAGINE CANADA

HR INTERVALS

Appendix:

Language and Usage Guide

Introduction

The number of terms, words, and acronyms people have developed to talk about issues of oppression, equity, and injustice can be difficult to navigate, and it can be hard to know which ones to use or which are appropriate for your context. The language we use is an evolving practice. This isn't about getting it perfect, but being aware of what we mean when we use certain words, and updating our vocabulary as we grow our understanding. This language and usage guide aims to help understand the definitions of these terms, but also how, when and why they are used.

It can be helpful to think about three different categories for the terms in this guide:

1. Umbrella terms that are meant to reference **many experiences of oppression at the same time**, such as “people from equity-seeking groups.”
2. Terms that are about **approaches to tackling,** like anti-racism or anti-oppression.
3. Terms to describe **specific experiences of oppression**, or different identities, such as racism, 2SLGBTQ+, working class people, etc. We haven’t addressed these terms in this guide - for definitions of these terms, you can find a Glossary of Terms, Systems, and Identities on the HR Intervals website.

Your organization might want to be really specific about the kinds of oppression you are addressing, or need to talk about multiple experiences at the same time. The context of your organization also matters - if you are a grassroots, activist organization, you might choose different terms than a bigger nonprofit that is attached to a hospital or university, for example.

Umbrella Terms

These are terms that are meant to refer to a wide range of experiences of oppression or of privilege at the same time.

Discrimination and discriminatory: is the prejudicial treatment of different categories of people, especially on the grounds of ethnicity, age, sex, or disability. In Canada, discrimination is legally prohibited under the Charter of Rights and Freedoms, which prohibits discrimination on grounds such as race, national or ethnic origin, colour, religion, age, sex (including pregnancy and childbirth), sexual orientation, gender identity or expression, marital status, family status, genetic characteristics, disability, and conviction for an offence for which a pardon has been granted or in respect of which a record suspension has been ordered. Each province and territory also has its own human rights legislation that prohibits discrimination, often covering similar or additional grounds. The legally protected characteristics have changed and evolved over time, and are often slow to adapt to changes in how systemic oppression is understood and defined, or accepted. Discrimination has a legal meaning and definition, and is also used more colloquially to refer to unjust treatment.

Equity-denied, equity-seeking, equity-deserving: There is a lot of discussion about these terms. All three of them "are used to refer to communities and groups that experience significant collective barriers in participating in society. This could include attitudinal, historic, social and environmental barriers based on age, ethnicity, disability, economic status, Indigeneity, gender identity and gender expression, nationality, race, sexual orientation, etc." (UBC Equity & Inclusion Office, 2025)." The use of terms like equity-denied, equity-seeking, and equity-deserving groups has primarily been meant to shift the focus to the structural and systemic barriers that cause inequity in the first place. Equity-seeking and equity-deserving are sometimes felt to confer more agency to affected groups; equity-denied to more squarely 'point the finger' at the issue. They are not widely used in community settings but are often seen in research, literature, and theory.

Indigenous, First Peoples, First Nations, Métis and Inuit: Indigenous and First Peoples are umbrella terms referring to First Nations, Inuit and Métis Nation, the three recognized groups of Aboriginal peoples in Canada. It refers to the original inhabitants of a territory; in the context of these guides, we mean what is now known as "Canada."

First Nations: refers to the Status, non-Status and Treaty Indians in Canada. It is used to replace "Indian," which is widely considered offensive terminology when used by non-Indigenous people. Inuit refers to all Indigenous peoples living in the arctic regions. In Canada, it refers to those living in communities across the Inuvialuit Settlement Region (Northwest Territories), Nunavut, Nunavik (Northern Quebec), and Nunatsiavut (Northern Labrador). The Métis are a post-contact Indigenous community that is connected to the fur trade in the area around Red River (Government of Canada, 2025). The term metis (without an accent on the e and often a small "m") means someone who is of combined First Nation and European descent, and does not necessarily mean they are part of the Métis Nation. These individuals are not necessarily part of the Métis Nation. Whenever possible, it is important to refer to the specific First Nations, Inuit, or Métis communities you are in relation with.

Multiply marginalized refers to individuals who experience multiple forms of discrimination or disadvantage based on various aspects of their identity. The concept acknowledges that these different forms of marginalization intersect and compound, leading to unique and often more severe challenges than if an individual only experienced one form of marginalization. For example, a Black transgender woman might experience discrimination based on her race, her gender, and her sexual orientation, and these experiences are not simply additive but interact in complex ways. This is also often referred to as "intersectionality."

People of colour (POC): The term people or person of colour (and the declinations such as 'women of colour') came into use in the 1970s in North America, and was meant in part as a political refusal of terms like immigrant or visible minority, which many activists found inaccurate and harmful. They also wanted to find a term that created solidarity amongst racialized people. It is sometimes criticized for implying too much shared experience amongst people of colour. This led to the development of the phrase Black, Indigenous, and People of Colour (BIPOC).

Black, Indigenous, and People of Colour (BIPOC): The addition of "Black and Indigenous" to the term "People of Colour" was meant to continue that desire for cross racial solidarity while also acknowledging the very particular place and impacts that anti-Black and anti-Indigenous racism have in North American culture. For more discussion about the limits and uses of terms like "People of Colour" and "Black, Indigenous, and People of Colour," a good resource is "What's Wrong With the Term 'Person of Color'" (Janani, Black Girl Dangerous, 2013). In the Canadian context, people often say this as "IBPOC," foregrounding the experiences of Indigenous peoples.

Privilege and people of privilege: is a special right, advantage, or immunity granted or available only to a particular person or group. Identity categories that do not experience systemic oppression - such as men, white people, wealthy people, able-bodied people, often will experience privilege. Most people who experience privilege are often not aware of it, as it is the norm for their experience. Privilege can be a difficult concept to apply well in practice and understand in practice, as many people experience some forms of oppression and some forms of privilege.

Racism: refers to a system of prejudice and discrimination where power and privilege are primarily held by individuals identified as white, and where people who are not white are assumed to be less deserving. Racism is a system that disadvantages and marginalizes racialized people through practices, policies, and cultural norms. It includes individual acts of racism and systemic racism, and both conscious and unconsciously held beliefs.

Racialized or racialization: the term racialized is often used to describe anyone who identifies as Indigenous, Black, Arab, Asian, Latinx, mixed race, and/or a visible minority, a person of colour, non-white, etc - that is, people who are not white. The term "racialized" is often chosen because it suggests that society creates racial categories - people become racialized, rather than "having a race" (see Bernard & Daniel, 2015).

Systemically oppressed or systemically marginalized: these are terms that refer to individuals or groups who are of non-dominant identities and social experiences, whose identities have historically and currently been oppressed (interpersonally, institutionally, etc). We are talking for example about: Indigenous,

Black, and racialized persons, women and gender diverse persons, people with disabilities, and 2SLGBTQ+ people.

Language of oppression and marginalization is more often used in slightly more activist or community contexts. Some people criticize these terms for focussing too much on the experience of oppression, and not on the agency of the people being oppressed, or who is doing the oppressing. **Systemic racism, systemic ableism**, etc are specific kinds of systemic oppression.

Tokenism: the experience and effect of individuals and groups of systemically marginalized identities being symbolically utilized as a way to give the appearance of equity, diversity, or inclusion. For example, a tokenistic hire is one where a candidate who belongs to a systemically marginalized identity is brought in, and would then likely encounter inequitable and exclusionary working conditions due to the employer's superficial uptake of equitable hiring and labour practices. Using representations of systemically under-represented people on communications materials like Employee Handbooks or organisational websites where they are not actually reflective of the organization's composition is also an example of tokenism.

Underrepresented groups: refer to communities of people who have been historically and systematically excluded or marginalized, often due to their race, ethnicity, gender, sexual orientation, socioeconomic status, disability, or other characteristics. This underrepresentation can manifest in various areas, such as employment, education, media, or leadership positions, leading to a lack of equitable presence and voice for these communities.

White: White is a racial category that generally refers to people from European ancestry. Who is considered white has changed throughout history based on how people are seen and understood. Being white or fitting under the umbrella of whiteness has evolved based on many factors. In North American society, being white is the position of racial power and dominance, and allows privileged access to resources and opportunity.

White-led: Organizations that are led primarily by white people (at the leadership or Board of Directors level).

Terms about Approaches

These are terms that are meant to explain different approaches to challenging inequity.

Anti-oppression: is meant to describe an active and intentional approach to identify, challenge, and dismantle oppressive systems and ideologies. The term has its roots in critical social theories and movements that emerged to challenge systemic injustices, emerging especially from the field of social work in the 1970s, and being adopted by social movements and feminist and critical race theorists through the 1980s and onwards. It is widely used in social justice activist circles.

Anti-racism: is meant to describe an active and intentional approach to identify, challenge, and dismantle all forms of systemic racism. While anti-racism is part of the umbrella of anti-oppression, it's often named explicitly. It is associated also with a strong body of scholarship and intellectual work that addresses racism, such as critical race theory, the work of Civil Rights leaders, and so on.

Anti-Racism and Anti-Oppression (ARAO): these two concepts are often used together, also to refer to an active approach to combating and eliminating racism and oppression. ARAO approaches are often focussed on changing structures, policies and practices to redistribute and share power equitably. ARAO practitioners work on the premise that systems of oppression, like racism, ableism, and sexism, are deeply entrenched in our groups and cultures, and that we must build new ways of doing things that are free from such oppression.

Decolonization: refers to the process of removing colonial power and control. In the Canadian context, this could mean things like returning land, resources, and governance to Indigenous peoples. It is also often used to refer to undoing colonial culture, colonial thinking, and colonial norms and beliefs. It is connected to the term "Indigenization."

There has been critique of the way that decolonization gets understood as a kind of, or similar to, other forms of anti-oppression work, like anti-racism, and the way that it gets used to only talk about (for example) changing curriculum or teaching methods. Activists and scholars engaged in decolonization claim that decolonization is not simply a request for Indigenous inclusion, but also a set of demands about repatriation of land and Indigenous sovereignty (see for example Tuck & Yang, 2012).

Equality: invites everyone to receive the same treatment, regardless of their gender, race, disability, etc. It is a foundational concept to many of the principles of Canadian governance; for example, the Canadian constitution guarantees "that every individual is equal before and under the law." While the idea of equal treatment is important in many contexts, it is also widely criticized because it does not take into account, for example, the history of racism, sexism, and so on that mean that people do not have equal "starting points" and may not have equal experiences of the same treatment. Equity is often a preferred concept.

Equity, Diversity and Inclusion (EDI, or DEI): which has evolved into other versions such as **Justice, Equity, Diversity, and Inclusion (JEDI)** or **Inclusion, Diversity, Equity, and Accessibility (IDEA)**. Sometimes, **belonging** is also added. In this context:

- **Equity** is about creating equal conditions for people to participate fully in society. Equity acknowledges that some groups face systemic barriers, and those barriers must be addressed to have any kind of "level playing field."
- **Diversity** refers to having a measure of representation within a community, ensuring that people and groups who experience systemic oppression are "at the table."
- **Inclusion** refers to the creation of an environment where people are able to participate, contribute, and be treated with respect, particularly groups who experience systemic oppression.
- **Justice** is sometimes added to the acronym to acknowledge the structural injustices that create the conditions for inequity, homogeneity, and exclusion in the first place, and underlines the importance of systemic change.
- **Accessibility** refers to the ways our environments, activities, and ways of communicating, relating and doing are usable or in contrast, create barriers for people. This often refers to the needs of

people with disabilities.

- **Belonging:** is about responding to the human need to be known, noticed, and missed in community.

Though the ideas behind EDI and associated terms came from social movements, and particularly anti-racist ones, these terms were popularized and brought forward by the American government's initiatives regarding equal employment opportunities. They are most often used in workplaces and institutions, and are most often seen as part of workplace policies and initiatives. For these reasons, they are often associated with more institutional or work-related contexts. These terms are also becoming the centre of backlash against inclusion work more generally, especially in the United States, but also in Canada.

Employee Resource Group or Employee Affinity Group: An Employee Resource Group, or ERG, is an employee-led group whose membership is based on a shared identity and/or experience of systemic oppression. These employees also continue to face systemic barriers in the workplace. ERGs can play numerous roles, including as a way for employees to "foster community, to build professional networks, and to share experiences and offer mutual support in relation to the workplace…" (McGill University, n.d.). These groups can play an important role in your organization's equity work, but are not the same as an equity working group.

Equity Working Group or Equity Committee or EDI Committee: a group of individuals in an organization tasked with questions, issues, and/or decisions related to Equity (Diversity, Inclusion, Accessibility, etc.). These groups vary in form, function, and size.

Indigenization: similarly to decolonization, Indigenization is both used to mean the process of bringing something (land, governance, structures, systems) under the power and influence of the Indigenous peoples of that area, and to refer to the incorporation of Indigenous worldviews into the norms, standards, or approaches of a group - like an organization, a school, or research project, etc. A concrete example might be that your organization would incorporate Indigenous customs into grievance procedures, such as healing circles or working with an elder or knowledge keeper who may support Indigenous employees when a grievance arises.

Indigenous self-determination: Indigenous self-determination can be described as First Nations, Metis and Inuit people reclaiming an individual and collective autonomy of self: that Indigenous people will decide what is best for themselves outside of the colonial system they have been forced to operate in for centuries. This means that the 634 First Nation communities and their members, the 53 Inuit communities that exist across the far north, and those belonging to Métis organizations, will pursue and shape their own governing bodies, policies, economies, education, and control of traditional territories (Truth North Aid, 2024).

Intersectionality: is a framework for understanding how various social and political identities, such as race, class, gender, and sexual orientation, combine to create unique experiences of discrimination and privilege. It recognizes that these different aspects of identity are not isolated but rather intersect and interact, shaping an individual's social standing and opportunities. It was developed by Kimberlé Crenshaw initially, to talk about how Black women had a unique experience of workplace

discrimination as compared to White women and Black men (Crenshaw, 1989). The term gets used in a very wide variety of contexts, some of which are a bit distant from the original definition of the word. Some groups use it to refer to an approach that takes into consideration multiple forms of oppression. Other groups will use it as a shorthand for a critique of forms of feminism that centre the experiences of white women.

Racial equity: Creating racial equity means giving people what they need to succeed, in a way that results in similar outcomes for people of all races. This means recognizing that some people need more to succeed than others as a result of the history of racism. This is often contrasted to the idea of racial equality, which would suggest treating everyone the same (regardless of race).

Truth and Reconciliation: in Canada, Truth and Reconciliation refers to the process of bringing to light the atrocities committed as part of the colonization of Canada (truth), and establishing and maintaining a mutually respectful relationship between Indigenous peoples, non-Indigenous peoples, and the Canadian government. As the Truth and Reconciliation Commission writes, "In order for that to happen, there has to be awareness of the past, an acknowledgement of the harm that has been inflicted, atonement for the causes, and action to change behaviour" (Truth and Reconciliation Commission of Canada, 2015, p. 6).

The drive for "Truth and Reconciliation" is sometimes criticized for being overly focussed on the relationship between Indigenous and non-Indigenous Canadians, and not sufficiently on material changes and actions to change the reality of Indigenous peoples living in Canada, and sometimes for being adopted in superficial ways. Most importantly, however, the 94 calls to action that were included in the Truth and Reconciliation report in 2015 have largely not been implemented, or only partially implemented, leading to a lot of cynicism about the project.

References and Resources

- Racialization - an overview (Bernard & Daniel, 2015)
- Demarginalizing the Intersection of Race and Sex: A Black Feminist Critique of Antidiscrimination Doctrine, Feminist Theory and Antiracist Politics (Crenshaw, 1989)
- First Nations, Inuit and Métis historical terminology (Canadian Government, 2025)
- The Canadian Charter of Rights and Freedoms (Government of Canada, 2025)
- What's wrong with the term person of colour (Janani, 2013)
- Employee Resource Groups (McGill University, 2025)
- Indigenous Self Determination (True North Aid, 2024)
- Honouring the Truth, Reconciling for the Future (Truth and Reconciliation Commission of Canada, 2015)
- Decolonization is Not a Metaphor (Tuck & Yang, 2012)
- Equity and inclusion glossary of terms (University of British Colombia, 2025)