



A TOOLKIT FOR INCLUSION



A TOOLKIT FOR INCLUSION (2016)

Developed for the City of Edmonton in 2016 by:

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Updated in 2019.



Acknowledgements

We would like to acknowledge that the content of this toolkit has been informed by the social inclusion project at the Mill Woods Seniors Association (MWSA).

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ABOUT THE TOOLKIT

The City of Edmonton is pleased to present A Toolkit For Inclusion. This Toolkit is meant to be used by agencies and organizations that provide programs and services for Edmontonians. Although this resource was designed with non-profit organizations and volunteer boards in mind, it can be applied in a variety of settings. The Toolkit is a practical resource that organizations can use to ensure that their facilities, programs and services feel welcoming and are inclusive to all.

WHO IS IT FOR?

The purpose of this Toolkit is to provide resources to help organizations and groups build capacity and to support the ongoing and important work of making spaces more welcoming, accessible and inclusive for all.

HOW DO I USE IT?

You can use this Toolkit as a guide. The Toolkit provides a series of activities and supporting resources for each step of an inclusion process.

You can:

- Use this Toolkit as a step-by-step guide.
- Select the steps that are useful to you.
- Adapt the ideas and examples in this Toolkit to develop activities that would work for your organization

WHY A TOOLKIT?

The purpose of this Toolkit is to help you:

- Assess the needs of your organization with respect to Diversity and Inclusion.
- Develop and implement strategies to ensure that the facility feels welcoming to all program participants, that programs are inclusive and that the organization's policies and practices support a welcoming and inclusive environment.
- Build capacity within board, staff and volunteers to address inclusion.

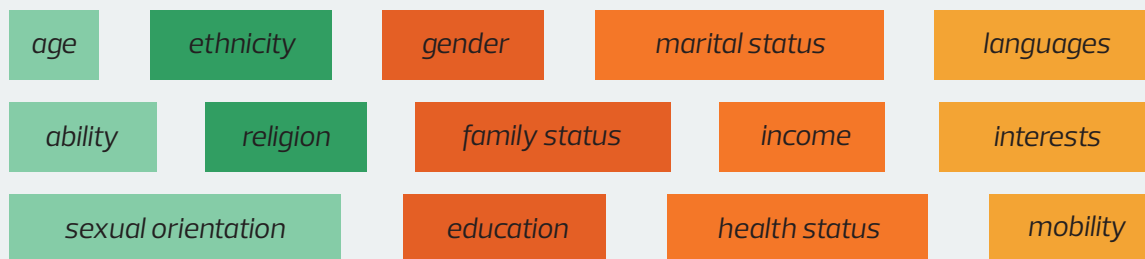
By making use of this Toolkit, organizations will be better able to develop programs and activities that meet the needs of diverse populations.

DIVERSITY AND INCLUSION

Diversity and inclusion are linked. An inclusive organization or group is one that acknowledges and respects diversity, recognizes barriers to inclusion and works to actively meet the needs of individuals with varied and diverse backgrounds.

WHAT IS DIVERSITY?

Diversity can be defined as the range of human differences.



WHAT IS INCLUSION?

Inclusion is valuing the range of human differences and viewing them as strengths. Inclusion can look like a culture of belonging and respect.

Diversity and inclusion

Diversity refers to the many differences between people. In addition to the differences mentioned in the previous section, individuals may have different educational and professional backgrounds, work experiences, family and marital statuses, interests, skills and abilities.

Access and barriers

Access can be defined as the opportunity or ability to participate in a program or use a service. Barriers can prevent, restrict or limit access and may be based on a person's identity or individual circumstances.

For example, a person with mobility issues may not be able to access a building that has stairs and no elevator, or anybody who is not fluent in English may not be able to participate in a program that requires them to speak fluent English.

A person living on a low income may find membership and program fees too expensive, and an immigrant or an Indigenous person may face discriminatory attitudes from others. Some of these barriers are unintentional, and those who are, for example, able bodied or whose first language is English, may not think about or be aware of barriers that others experience. Barriers can only be removed if we are aware of them. Organizations that are working towards inclusion have to intentionally set out to discover these barriers and address them in order to increase access.

Assumptions about other people

Every day we develop views, beliefs, opinions and attitudes based on information that we pick up from a number of sources: family members and peers, the media and brief personal meetings. These sources provide a mixture of information that may include myths, stereotypes and prejudicial and discriminatory attitudes. Some of this information causes us to misjudge those whom we perceive to be different from ourselves. As individuals going about our busy daily lives, we often consciously or unconsciously make two key assumptions. The first is that everyone who looks or sounds the same is the same. The second is that everyone who looks or sounds like us is like us. These assumptions are often incorrect.

Each of us also has personal preferences and sometimes we act on these preferences in a manner that excludes others and may be based on bias. A bias is a point of view or inclination that may develop itself through favouritism, dislike, prejudice and even fear because of a person's looks, behaviour,

lifestyle or circumstances. Biases can be shown through verbal and physical actions. Given that each of us is a product of our time and our environments to a certain extent, it is unrealistic to expect that anyone is completely without bias.

It is important to become aware of the misinformation and biases that we carry so that we can remove the barriers that exist and keep us from achieving mutual respect and understanding. Since we are not always aware of these attitudes and beliefs, we need to pay attention to how we think and feel about other people, to examine the roots of our thoughts and analyze them for biases.

— Adapted from *Inclusive Community Organizations: A Tool Kit* (Page 17)



DIVERSITY AND INCLUSION IN EDMONTON

As we have seen, there are many differences within the population. Organizations need to be aware and learn about these differences and the barriers that some individuals may experience when trying to access programs.

Organizations may be very good at meeting the needs of some groups, but there may be segments of the population whose needs are being ignored or not fully met. Groups should be able to identify those who are facing barriers, and actively reach out to them.

Creating more welcoming and inclusive spaces requires ongoing commitment and effort, and will take time. Some organizations may be quite ready to embark on the journey to becoming more inclusive, and others may need some preparatory work before beginning this process of change. It may take some effort to communicate the goals for inclusion, for everyone at your organization to be committed to the goal and to build capacity within your organization to become more inclusive.

Acknowledging diversity and working towards inclusion has to be an ongoing process within any group or organization, and will require changes in the attitudes and behaviours of existing members, board and staff. People may need to shift their perspectives and change their ways of working and interacting with others. This can be challenging, as it requires people to be aware of their attitudes towards others who are different from them, and open to new ideas and ways of thinking. Organizational policies and practices may also

need to be developed or refined to support changes at the individual level.

Diversity has sometimes been framed in terms of certain demographic groups, and some people may not see how inclusion work will benefit them personally or may not see the importance of it to their organization. Resistance can be caused by discomfort with some kinds of difference, a lack of awareness about barriers to participation for some groups or the belief that enhancing access and inclusion for some groups means less access for others. Board members and staff may also be worried about being marginalized within their organization, or of having less control when new groups start to access the organization. Some individuals may be unfamiliar with the language and concepts used in diversity and inclusion initiatives.

The first step in addressing resistance is to understand the reason for the resistance. Having open conversations and dialogue about the intent of the initiative, providing opportunities for others to learn about and discuss diversity and inclusion concepts and emphasizing the benefits of inclusion to all and to the organization will help to allay discomfort and fear, and to get support for organizational change.

LET'S GET STARTED

This Toolkit is divided into twelve sections. Each section is an important step your organization can take to become more inclusive. You can either start at the beginning and undertake each step in sequence or you can choose the section that best meet your needs and goals.

- | | |
|--|---|
| 1 <i>Conduct a needs assessment</i> | 7 <i>Conduct a program review</i> |
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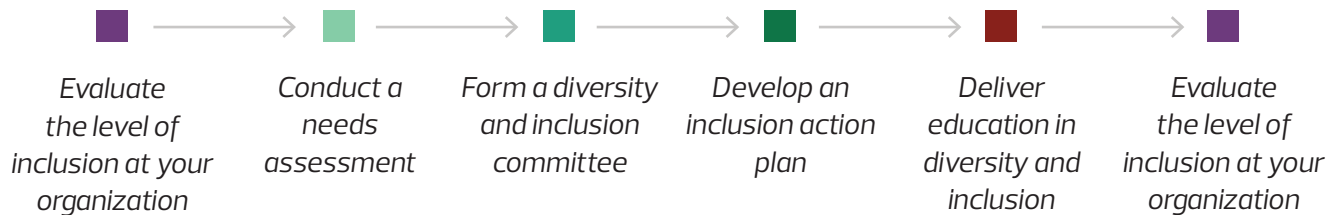
TIP!

If you work with program delivery, try this pathway through the toolkit:



TIP!

If you are a board member, Executive Director or manager in a human services organization, explore this pathway:



Board and leadership commitment

If you are delivering programming or services in a larger organization, it is important that you have support from the board and/or leadership team to begin inclusion work. If you need to make the case for the importance of diversity and inclusion, then delivering education in diversity and inclusion can be an important first step to build awareness and to get people talking about the issues.

Ask the facilitators who deliver the training to build in some discussion time for participants to consider how to make your space more inclusive for diverse individuals. This discussion can lead to other steps in this toolkit.

1 CONDUCT A NEEDS ASSESSMENT

So you want to work at becoming a more welcoming and inclusive organization. Where should you begin? If you are not sure where to start or what issues you need to address, you might want to begin by conducting a needs assessment.

A needs assessment can help you to determine the specific barriers that people at your organization or in your community may be experiencing when trying to access programs and activities. You may already be aware of some of these barriers, but unaware of others, or how best to reduce or minimize these barriers. Those who face barriers or who feel unwelcome may not express their needs – they may simply not come, or participate in a very limited way. It is important to ask diverse groups of individuals what they would like to see happening at your organization, and understand the factors that limit their ability to access the programs they need.

A needs assessment also gives you the opportunity to have a conversation with your board, staff and volunteers about Diversity and Inclusion. Through the needs assessment, you can gather information about how they understand the idea of a welcoming and inclusive space, how well they feel the programs are meeting the needs of others, barriers to access, as well as ideas for improving access.

METHODS TO USE

You can choose one method or a combination of these to collect the information you need.

Surveys

Surveys can be conducted by mailing questionnaires to selected people, by talking to people on the phone, by handing out hard copies of the survey at your organization or by posting questions on your website. Surveys have to be carefully designed to make sure the questions can be easily understood, answered in a short period of time and accurately capture useful information.

Interviews

Interviews are useful for obtaining more in-depth information about one person's opinions and perspectives. Interviews can be conducted face-to-face or over the phone.

Focus groups

A focus group is a conversation with a group of people. The advantage of a focus group is that you can talk to more people, and participants can build on and add to each other's ideas.

STEPS IN CREATING A NEEDS ASSESSMENT

Here are the recommended steps to conduct a needs assessment:

1. Determine the key questions for the needs assessment and what information you would like to collect.
2. Decide which groups can best provide the information you need, and how many people from each group you need to speak to. Possible groups that you might want to include are board members, staff, volunteers, members or program participants, potential new members in the geographical community you serve or from other areas in Edmonton, various family members, other community members and representatives of specific communities (e.g. leaders of ethnocultural communities, LGBTQ individuals, seniors, etc.).
3. Determine the method you will use to collect information. These can include interviews, focus groups or surveys.
4. Select the people from each group that can provide the information you need. Make sure that the people you select include those from diverse backgrounds, and who can provide a range of opinions and perspectives.
5. Develop the questions appropriate to each method.
6. Schedule and conduct the interviews, focus groups or survey.
7. Analyze the information collected and develop the key themes.
8. Report the results of your needs assessment in a document.
9. Use the results of the needs assessment to develop and implement an inclusion action plan with strategies to make your organization more welcoming and inclusive.



TIP!

In designing the needs assessment, it is important to include people from diverse groups and various levels of participation in your programs. It is also important to speak to individuals in your community who do not attend the organization, to understand their particular needs and barriers.



WHO SHOULD CONDUCT THE NEEDS ASSESSMENT?

The needs assessment can be carried out either by a staff member, a volunteer or an external consultant, depending on the resources available.

It is important to ensure that the person selected to conduct the assessment has expertise and experience in conducting research studies of this type. Conversations about Diversity and Inclusion can be challenging, and the staff, volunteers or consultants selected should have the skills to design the needs assessment and to engage in these conversations.

The person conducting the needs assessment should have the skills and expertise to:

- Determine the scope and purpose of the needs assessment.
- Select the right methods and develop appropriate questions for each method.
- Conduct interviews and facilitate focus groups, while creating a safe space for participants to share their perspectives.
- Analyze data, develop key themes and report the themes in a document.



TIP!

The needs assessments can collect information through interviews and focus groups with board members, staff, volunteers and program facilitators. The results of the needs assessments can be used to develop strategies and plans that can be implemented by an organization.



WHAT QUESTIONS SHOULD YOU ASK?

Here are some sample questions you can include in your needs assessment:

1. Why did you become a member at this organization, and how long have you been a member?

2. What does being welcoming and inclusive at this organization mean to you?

3. Do you think it is necessary for this organization to work on becoming more inclusive? Why or why not?

4. What is working well in terms of inclusion here?

5. What are some barriers and challenges to inclusion that you have seen or heard about?

6. Do new people here feel welcomed when they first attend this program/organization?

7. Are the programs meeting the needs of all who attend as well as others in the community? If not, what programs would you change or add?

8. Do the staff have the knowledge and skills to address Diversity and Inclusion? Do you have the skills to resolve conflict when it arises?

9. Is there a need for new policies to address inclusion?

10. How could barriers or challenges to inclusion be addressed?

11. Whose responsibility is it to address these challenges?

12. What other ideas do you have to make this program/organization more welcoming and inclusive?

2

FORM A DIVERSITY AND INCLUSION COMMITTEE

Creating a more welcoming and inclusive organization will require a sustained commitment to the goals of inclusion. A Diversity and Inclusion Committee can help to plan and guide this work.

The Diversity and Inclusion (D&I) Committee should have representatives from all the different groups in your organization – the board, staff, volunteers and members or program participants. You may also want to invite some community members to be on the committee, especially if there are citizens in the community who are not accessing your programs.

What should the committee do first? Any group that is going to work together over a period of time should have a shared understanding of their goal and purpose. To begin the work of the D&I committee, you might want to start by having a discussion about the purpose and goals of the committee. Members of the committee may have different perspectives on what Diversity and Inclusion means to them, and it would be useful to share these perspectives. The discussion could be facilitated by a committee member, or you could bring in an external facilitator with expertise in this area.

Once the committee has come to an agreement about their purpose, and how they will operate (e.g. Terms of Reference), they can begin the task of creating an inclusion action plan (see next section).

The first step should be to create a terms of reference for the committee to help to clarify the role, structure and decision making processes for the committee. Here are some things you may want to include in the terms of reference:

- The structure of the committee (e.g. role of the chair, number of members).
- The role, responsibilities and reporting structure of the committee.
- Membership composition and the length of members' appointment term.
- How decisions will be made.
- Frequency of meetings and reporting requirements.

SAMPLE TERMS OF REFERENCE FOR A D&I COMMITTEE

Here is an example of what a Terms of Reference can look like. You can modify this template to suit your needs.

The D&I Committee assists the Board of Directors to:

1. Provide leadership in reviewing and exploring strategies to build a diverse and inclusive organization.
2. Make recommendations regarding these strategies to the Board of Directors.
3. Work with staff to develop an action plan, communications plan and budget to meet the mandate of the Committee.
4. Engage the membership in supporting strategies and plans for building a diverse and inclusive organization.
5. Learn and share information on best practices regarding D&I.
6. Provide guidance and advice to the President and Executive Director on D&I matters.

Appointment Membership and Length of Service

The D&I Committee shall consist of between three and six members, excluding the President and Executive Director who are non-voting members. The Committee may include non-board members who are willing to share their knowledge and experiences to carry out the duties and responsibilities of the Committee. The Committee shall be approved by the Board. Board members may serve on the D&I Committee for the length of their term. Non-board members shall serve for one year, and their term may be extended for an additional year.

Chair of the Committee

The D&I Committee Chair shall be a board member and shall be appointed by the Board's President with the approval of the Board. If the Committee Chair is unable to attend a meeting, the Committee members will be polled prior to the meeting and a substitute chair for the purposes of that meeting will be identified from the members who have indicated they will be present.

Meetings

The Committee shall hold at least four meetings each year and any additional meetings as the Chair may deem necessary or appropriate. The Chair or any three members of the Committee may call a special meeting of the Committee. A majority of members present is sufficient to proceed with a meeting and make Committee decisions.

Communications and Minutes

The chair shall report orally or in writing to the Board on matters discussed at the most recent Committee meeting. Minutes of each Committee meeting shall be prepared and shall be provided to all members for their review and upon approval shall be made part of the official record of proceedings of the Board or the organization.

Resources and Authority

The D&I Committee may utilize staff as support for its work. Upon approval by the Board and Executive Director, it may retain the services of external advisors or consultants as necessary to support the Committees' work.

3 DEVELOP AN INCLUSION ACTION PLAN

Once you have completed a needs assessment, you will have a better sense of what needs to be addressed, as well as some ideas for moving ahead.

The recommendations from the needs assessment can be used to create an action plan that will help you implement these ideas. If you have already formed a Diversity and Inclusion Committee, the committee could take on the task of creating a plan.

WHO SHOULD CREATE THE INCLUSION ACTION PLAN?

- External consultants who conducted the needs assessment
- Staff at your organization
- The Diversity and Inclusion Committee if you already have one (see previous section)

WHY DO YOU NEED AN INCLUSION ACTION PLAN?

An action plan with tasks and timelines will help you define your goals for inclusion, the strategies you want to implement, the tasks involved in implementing these strategies, the resources you will need and timelines for getting things done.

A plan can also help you to communicate your commitment to inclusion and to build support for your strategies from different groups within your organization. A plan can help you make sure that everyone is on the same page.

Make sure that your plan is realistic, and that it takes into account the resources you have available to you as well as people's readiness for change. Be as practical as possible about what you can achieve. Although it is great to set your sights high, a measured and steady approach to change will be more achievable than a plan that over-stretches your organization's resources and people's capacities.

Your Inclusion Action Plan can be a living document that you modify and add to as you work towards being a more welcoming and inclusive organization.

SAMPLE ACTION PLAN

Here is an example of what an action plan can look like. You can modify this template to suit your needs.

▶ **Establish a Diversity and Inclusion Committee**

Rationale:

- Provide direction for initiatives related to inclusion, and guide the implementation of the initiatives

Timeline:

- Short-term

Actions/Notes:

- Develop draft Terms of Reference for committee
- Have Terms of Reference approved by the board
- Find members for committee

▶ **Conduct a program review using the Inclusion Lens**

Rationale:

- Assess whether current programs could be enhanced for greater inclusion

Timeline:

- Within the year

Actions/Notes:

- Determine who will conduct the program review
- Select an appropriate meeting time to conduct the review
- Document discussion
- Implement any recommended changes

▶ **Incorporate Diversity and Inclusion-related competencies into job description positions**

Rationale:

- Ensure board members, staff and volunteers have competencies to enhance inclusion at your organization

Timeline:

- Within the year

Actions/Notes:

- Review job descriptions for all positions
- Determine the specific Diversity and Inclusion-related competencies required for each position
- Amend the position description

4 DEVELOP AN INCLUSION MODEL

One of the first steps in becoming a more welcoming and inclusive organization is to develop a vision, values, goals and principles related to inclusion and equity. An inclusion model can provide a framework for thinking about Diversity and Inclusion and help people come to a common understanding of what the organization is working towards. Clearly articulating your vision and commitment to inclusion and equity are important elements of your inclusion project.

ELEMENTS OF AN INCLUSION MODEL

Choose the elements that you would like to incorporate into your Inclusion Model. Examples of these elements are:

- Definitions of Diversity and Inclusion
- A vision statement
- Values that would support this vision statement
- Goals of inclusion
- Diversity and Inclusion principles

HOW YOU CAN USE YOUR INCLUSION MODEL

- Use the model to have conversations about what inclusion means to different people and to gather a variety of perspectives on how it can be achieved.
- Create a poster of your Inclusion Model and post it in your space to communicate and remind people of the vision and goals for inclusion and the organization's commitment to equity.

- Deliver an education session on the different aspects of the model to board, staff, volunteers and interested members. Provide an opportunity for participants in the session to talk about how the elements of the model can be demonstrated in the programs and activities of your organization.

WHO SHOULD DEVELOP THE INCLUSION MODEL?

The model can be developed by the D&I Committee. You could also involve selected board members, staff, volunteers or members who have a good understanding of Diversity and Inclusion. You may already have some policies or statements about inclusion at your organization, and you could include these in your model if appropriate.

A sample model is provided here, based on the City of Edmonton's Diversity and Inclusion Framework. You could adopt this model, or you could modify it to meet your needs.

SAMPLE INCLUSION MODEL

Here is an example of what an Inclusion Model can look like. You can modify this template to suit your needs.

▶ **Vision for Inclusion**

Our organization will reflect the diversity of the community it serves, and is inclusive in all respects. All members, staff and board feel a strong sense of belonging to the organization and are valued for their skills and perspectives. The organization's policies, programs and activities meet the diverse needs of the membership. The organization strives to continually respond to changes in community demographics and needs.

▶ **Diversity & Inclusion Principles**

- **Recognize** | We will recognize differences between individuals.
- **Respect** | We will ensure that each individual is respected and included.
- **Respond** | We will respond to the diverse needs of our membership.
- **Reach Out** | We will actively reach out to the community around us.

▶ **Goals of Inclusion**

- Have a membership broadly reflective of the community we serve.
- Identify and address any barriers to inclusion at our organization.
- Create policies and programs that meet the diverse needs of the membership and the community.
- Attract and retain a diverse board, volunteers and staff to model inclusive practices.

5 APPLY AN INCLUSION LENS

A lens helps us to see something we might be missing, or provides a new perspective. An Inclusion Lens is a tool that can be used to review an organization's policies, practices and programs. It ensures that they support inclusion and meet the diverse needs of the membership and the community.

WHAT CAN THE INCLUSION LENS BE USED FOR?

The Inclusion Lens can be used to assess and review:

- How welcoming and inclusive your organization/program feels to program participants.
- Your organization's policies and programs.
- Communication methods and materials.
- Recruitment policies and practices.

This guide provides a number of different Inclusion Lenses in the next few sections. You can use the lenses as provided or you can modify the questions to meet your needs. There may be some questions that are not relevant to your organization, and there may be other questions you would like to change or add.

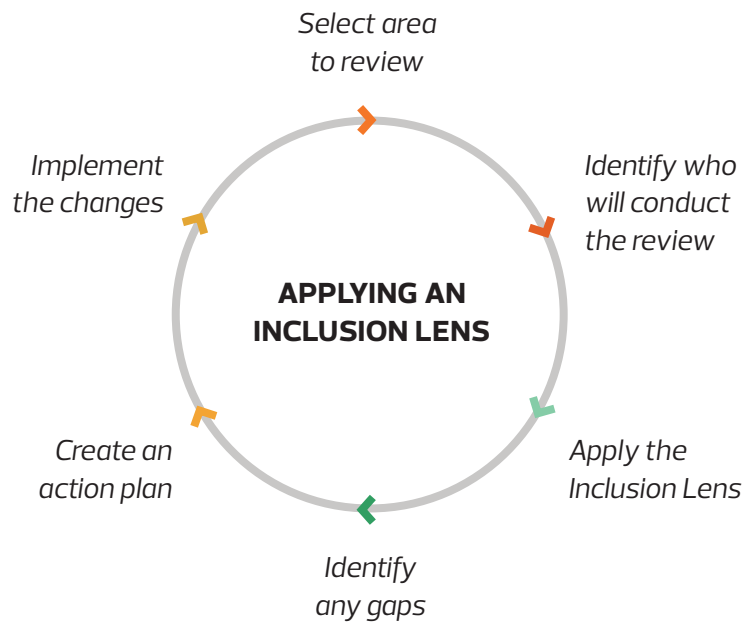


HOW TO APPLY THE INCLUSION LENS

The following process can be used when using the Inclusion Lens:

1. Determine which areas you would like to review (policies, programs, communication methods).
2. Gather a group of people who have relevant information and can respond to the questions in the Inclusion Lens you are working with. For example, if you want to review your policies, you may want to work with a group most familiar with the policies (e.g. the Executive Director or the policy committee). If you want to review your programs, it might be best to work with the staff member, program committee or whoever is responsible for making decisions about programming.
3. Apply the appropriate Inclusion Lens by responding to each question in the lens. Add any additional questions that are relevant or important to you.
4. Use your responses to the questions to help you identify any gaps that need to be addressed. Document these gaps so that the information is not lost.
5. Create a written action plan to address the gaps.
6. Implement the action plan.

The review can be repeated periodically to ensure that inclusion is being addressed on an ongoing basis.



6 ASSESS YOUR ORGANIZATION

One of the most important aspects of creating a welcoming and inclusive organization is ensuring that all community members experience a helpful, friendly and respectful environment. Those who are long-time members may feel quite comfortable, but may not be aware how the space feels to new members, or members who only attend events occasionally.

Inclusion Lenses can help you assess how welcoming and inclusive your space feels to those from different backgrounds, different lifestyles and with a variety of needs and interests. The assessment could be conducted by a group comprised of three to four people familiar with the activities at your organization. These could include board members, staff, volunteers, or members. This group could informally chat with different groups over a period of a few weeks to gather their perspectives and involve them in the assessment.



APPLY AN INCLUSION LENS ON YOUR ORGANIZATION

This Inclusion Lens can be used to review how welcoming and inclusive your organization is in general.

Questions to Ask:

Comments:

1. Are members and other visitors greeted warmly when they arrive? Are they given the help and information they need?

Always Sometimes Not at all

2. Do staff and volunteers generally treat members and visitors with respect?

Always Sometimes Not at all

3. Do members in your organization generally treat each other with respect, within the facility and when participating in programs and events?

Always Sometimes Not at all

4. Do members make an effort to be welcoming to new members?

Always Sometimes Not at all

5. Do members try to adjust their attitudes and behaviors to be more welcoming and inclusive to people of diverse backgrounds?

Always Sometimes Not at all

6. Are members respectful of the differences between them and other members?

Always Sometimes Not at all

7. Is there a regular process in place to ask members if they feel welcomed and included?

Always Sometimes Not at all

Review your policies for inclusion

Policies guide the day-to-day activities and decisions of an organization, and should support your goals of inclusion. A policy review allows you to check your policies for inclusion and can help your organization enhance inclusion in two ways: it can help you determine if your current policies are addressing inclusion, and decide whether you need any new inclusion-related policies.

To review your policies, you can use the questions in the Policy Inclusion Lens. If you have a policy committee at your organization, the review could be conducted by the some members of the committee in collaboration with the Diversity and Inclusion Committee. The review could also be conducted by board members and/or staff familiar with the organization's policies, and with your goals of inclusion.

Examples of how policies might have to be adjusted to be more inclusive:

- You have a job description for board members and staff, but it does not have any competencies related to inclusion.
- You have a code of conduct for members and volunteers, but it does not include a process for addressing incidents of harassment or discrimination.
- Your membership and program fees do not consider the needs of low-income community members who may need financial assistance to participate in programs.

APPLY AN INCLUSION LENS ON POLICY

Questions to Ask:

Comments:

1. Are policies written in plain and inclusive language?
 Always Sometimes Not at all
2. Do policies align with the vision and values of inclusion at your organization?
 Always Sometimes Not at all
3. Does the policy address the diverse needs of citizens in your surrounding community?
 Always Sometimes Not at all
4. Do the policies (or the manner in which they are implemented) unintentionally create barriers, exclude or impact any members unfairly?
 Always Sometimes Not at all
5. Do the policies conform to human rights laws?
 Always Sometimes Not at all
6. Are there policies to address harassment or discrimination among members, staff and the board?
 Always Sometimes Not at all
7. Are board members, staff, volunteers and members made aware of existing and new policies?
 Always Sometimes Not at all
8. Are policies being implemented effectively?
 Always Sometimes Not at all
9. Are there barriers that prevent the implementation of policies?
 Always Sometimes Not at all

7 CONDUCT A PROGRAM REVIEW

Inclusive programs and activities are critical in ensuring that the needs of diverse groups of citizens are being met.

Applying an Inclusion Lens to your programs can help you explore how inclusive your current programs are, whether there are barriers that prevent some people from accessing your program and determining if new or different programs are needed to attract a broader demographic of people.

The program review could be conducted by anyone involved with developing, planning and implementing programs. This could include the staff member responsible for programming, the program committee (if you have one), or volunteers who deliver programs. A team approach to conducting a program review will ensure that a variety of perspectives are included.

Everyone involved with programming will have different information about how well programs are meeting the needs of your members and others in the community.



APPLY AN INCLUSION LENS ON PROGRAM PLANNING

This Inclusion Lens can be used to review your program planning process.

Questions to Ask:

Comments:

1. Do you have information about the people in your community (e.g. demographic information, different cultural groups, languages spoken, age groups, etc.)?

Always Sometimes Not at all
2. Are there processes in place (e.g. regular surveys) to ask members if programs are meeting their needs?

Always Sometimes Not at all
3. Do your programs and activities meet the needs of your current and potential diverse membership?

Always Sometimes Not at all
4. Do you ask about what prevents current and potential members from fully participating in your programs and activities?

Always Sometimes Not at all
5. When new program or services are being planned, are the various needs of the membership being considered?

Always Sometimes Not at all
6. Do you ask for input from people in your community who do not currently attend your organization when planning, developing and implementing new programs?

Always Sometimes Not at all
7. Do you consider the different needs of your members and other local citizens when planning programs and activities (e.g. transportation needs, respect for faith or spiritual practices, dietary needs, language barriers, mobility issues)?

Always Sometimes Not at all
8. Do staff and volunteers have the skills to plan and implement programs that are inclusive and meet the needs of a diverse population?

Always Sometimes Not at all

APPLY AN INCLUSION LENS ON A SPECIFIC PROGRAM

This Inclusion Lens can be used to review each program, or a group of programs (e.g. all fitness programs).

Questions to Ask:

Comments:

1. Do citizens have access to a clear description of this program, and details about how to participate in the program?
 Always Sometimes Not at all
2. Does the program align with the mandate of the organization?
 Always Sometimes Not at all
3. Are there sufficient resources available to deliver this program (e.g. staff, space, materials)? What additional resources would be helpful?
 Always Sometimes Not at all
4. Are members participating in the program on an ongoing basis?
 Always Sometimes Not at all
5. Does this program take into account the different needs of people in your community (e.g. respect for faith or spiritual practices, transportation needs, dietary needs, language barriers, mobility issues)?
 Always Sometimes Not at all
6. Do you have a process in place (e.g. evaluations) to ask program participants whether they are satisfied with the program, and whether it is meeting their needs?
 Always Sometimes Not at all
7. Do you know what prevents current or potential participants from fully participating in this program?
 Always Sometimes Not at all
8. Do you make changes to this program to increase participation?
 Always Sometimes Not at all
9. Do staff and volunteers have the skills to deliver this program in an inclusive manner?
 Always Sometimes Not at all

HOW PROGRAMS COULD BE ENHANCED TO BE MORE INCLUSIVE

Here are some examples of how you can enhance your programs to be more inclusive:

- Use an application form that asks for demographic information. Ensure that information such as languages spoken, needs and interests, etc. is collected, reviewed and made available to the program committee on an ongoing basis to help them design inclusive programs.
- Implement a process for evaluating programs on an ongoing basis.
- Provide program fee subsidies for those who cannot afford the full fees.
- Offer programs at the end of the day or in the evening for those who are still working, or looking after grandchildren during the day.
- Modify activities such as fitness classes to accommodate different levels of physical ability and mobility (e.g. chair exercises).
- Provide comfortable spaces and tea or coffee for those individuals who may not want to participate in formal programs, but would like to meet others and socialize.

IDEAS FOR IMMIGRANT AND REFUGEE PROGRAMS

Provide English language programs that:

- Recognize first language literacy challenges.
- Include an opportunity to socialize and engage in conversational English.
- Provide recreational and other programs that do not require English language skills and that will minimize language barriers to participation (e.g. fitness and dance classes).
- Offer more programs targeted to specific ethnocultural/linguistic communities. Start by offering a program that is targeted to a specific cultural and/or linguistic group to draw them to a facility they are not familiar with. For example, a group of South Asian people in a particular community play Carrom Board, a table game similar to billiards and table shuffleboard. An organization purchased a Carrom Board and added it to their lounge, which brought in new program participants, who eventually became interested in other activities at the centre.

— Reference: Age of Wisdom Report

8 CREATE A COMMUNICATIONS PLAN

Effective communication can be key in promoting your organization as a welcoming place for all. The commitment to becoming a more inclusive organization needs to be communicated to your membership and community, as well as to your staff and volunteers. It is important to remind people that inclusion matters and that you are actively working towards this goal.

A communications plan can help you to get your message across in a consistent way, using the method that would best reach your audience. A good communications plan will create support for your inclusion project, and motivate others to work towards the same goal.

STEPS IN CREATING A COMMUNICATIONS PLAN

You can either create a new communications plan or build on an existing one.

If you already have a communications plan, you can review it to ensure that it addresses inclusion, and add the appropriate strategies to respond to any gaps. The task of creating a communications plan could be taken on by the Diversity and Inclusion Committee, or by the communications committee if you have one at your organization.

Here are the steps you can take to create a communications plan:

1. Identify your current communication strategies

- What strategies do you currently use to communicate with your membership and volunteers (internal communication)?

- What strategies do you use to communicate with the community (external communication)? These can include program guides, brochures about specific programs, newsletters etc.

2. Review the effectiveness of your current communication strategies

- Are your current communication strategies effective? Use existing information or feedback you have received about your communication methods (e.g. surveys you have conducted, informal feedback from your members, staff knowledge of the needs of your members, etc.) to determine if your strategies are working.

- Is the desired message reaching all your different target audiences? For example, do people in your community have enough information about current programs, or only those members who frequently attend your organization/ program?

3. Check your current communication strategies to ensure that they are inclusive

- Are your promotional materials (such as newsletters and program guides) appropriate for the diverse groups of people in your community? Do they take into account the information needs of various groups? Does all your communication content convey a message of inclusion? Is content on your website available in multiple languages?

4. Develop a plan

- Using the information from Steps 1, 2 and 3, determine which strategies need to be changed or enhanced, and any new communication strategies that need to be implemented.

SAMPLE COMMUNICATIONS STRATEGY

Here is an example of what a communications strategy can look like. You can modify this template to suit your needs.

<p>Organizational brochure Content: Information about our organization</p>	<p>Target Audience: Community Frequency: One time</p>	<p>Method(s):</p> <ul style="list-style-type: none"> Printed
<p>Monthly newsletter Content: Information about programs and activities</p>	<p>Target Audience: All those who are members or attend programs Frequency: Monthly</p>	<p>Method(s):</p> <ul style="list-style-type: none"> Printed Website Facebook page Twitter account
<p>Information about specific events, programs and activities Content: Upcoming events, programs and activities</p>	<p>Target Audience: Members Frequency: Monthly</p>	<p>Method(s)</p> <ul style="list-style-type: none"> Printed brochures Posters Fan out phone calls
<p>Membership drive presentation Content: Information about your organizations programs and activities</p>	<p>Target Audience: People in the community Frequency: Twice a year</p>	<p>Method(s):</p> <ul style="list-style-type: none"> In person at various locations
<p>Fundraising brochure Content: Information about your vision, mission and community impact</p>	<p>Target Audience: Donors Frequency: One time (updated as necessary)</p>	<p>Method(s):</p> <ul style="list-style-type: none"> In person at various locations

SAMPLE COMMUNICATIONS MAP

Here is an example of what a communications map can look like. A communications map helps you to determine who you need to reach and why it is important to communicate with them. You can modify this template to suit your needs.

<i>Communication Content</i>	Information about your organization and your programs	
<i>Target Audience</i>	Members	Your Community
	Non-members	Edmonton Communities
	Funders & Donors	Human Services and Community Organizations
<i>Communication Objectives</i>	<ul style="list-style-type: none"> • Extend and enhance your reputation • Increase membership from diverse communities • Attract diverse board members, staff and volunteers • Attract and retain donors 	

APPLY A COMMUNICATIONS INCLUSION LENS

Questions to Ask:

Comments:

1. Do your communications materials and methods take into account the diversity within the general population?
For example: Are you considering the needs of isolated individuals who cannot access printed materials, whose first language is not English, who don't have access to a computer, who are visually impaired, etc?

 Always Sometimes Not at all

2. Do you consider the needs of other groups that may want information about your organization or programs?
For example: Have you thought about providing information to families, caregivers, social workers, outreach and community health workers?

 Always Sometimes Not at all

3. Do you consider which groups may be missed by only using certain communication methods?
For example: Are you relying only on social media or online communications? That misses people who do not use computers or the Internet.

 Always Sometimes Not at all

4. Is the information available in a variety of formats to make it as accessible as possible?
For example: Is information available in person at your organization, online, with printed materials, by phone (either answered by a person or through a voice mail recording)?

 Always Sometimes Not at all

5. Are materials and information presented in plain language? Is there any terminology that might be confusing for those with limited English language skills?
For example: Are all acronyms written out or explained?

 Always Sometimes Not at all

Questions to Ask:

Comments:

6. Do you know the predominant languages spoken in your community and provide information in these languages?

Always Sometimes Not at all

7. Are there concepts or terms in written materials that may be culturally specific and need to be explained to make them easier to understand?

For example: Do you provide a brief explanation of what an "open house" or "meet and greet" means?

Always Sometimes Not at all

8. Do visual images such as photos on your program guide or your website represent the diversity in the general population?

For example: Do your images capture the diversity within specific communities of people? Will the people portrayed in the images relate to and feel included in the way they are represented? Is everyone portrayed in positive images that disrupt stereotypes?

Always Sometimes Not at all

SAMPLE COMMUNICATIONS ACTION PLAN

Here is an example of what a communications action plan can look like.

You can modify this template to suit your needs.

► Establish a Communications Committee

Objective:

- Enhance communication by having a specific group take responsibility for communication

Actions/Notes:

- Create Terms of Reference for committee

► Make information on your organization's website available in languages other than English

Objective:

- Make the website more accessible to non-English speakers

Actions/Notes:

- Determine the 2-3 top languages other than English spoken by people in the community
- Have basic information about your organization translated into these languages
- Modify website to add this information

► Develop a list of organizations and contacts and send out periodic updates about upcoming programs and activities

Objective:

- Reach a broader demographic of people through other organizations that they might be connected to

Actions/Notes:

- Create a list of organizations and contacts that would be willing to share information about your activities
- Create a one page summary of upcoming programs and activities that can be emailed to the list of organizations

► Ensure the materials reflect the diversity in your community

Objective:

- Create a more welcoming image

Actions/Notes:

- Review communication materials for inclusion and enhance where necessary

► Create materials such as posters and postcards that convey a message of inclusion

Objective:

- Communicate your commitment to be welcoming and inclusive

Actions/Notes:

- Compile information for the materials
- Design the materials
- Distribute the materials

DELIVER EDUCATION IN DIVERSITY AND INCLUSION

Education about Diversity and Inclusion can be a key component of organizational change, and play an important role in increasing awareness and building capacity. It can also set the foundation for future work by providing an opportunity for people to share perspectives and come to a common understanding of what Diversity and Inclusion mean.

DELIVERING EDUCATION IN DIVERSITY AND INCLUSION

Here are some guidelines for providing education and training:

- Use the results of your needs assessment to determine gaps in knowledge and skills, and design your training to address those gaps.
- Ensure the educator you select has a good knowledge of this area, and the skills to facilitate sensitive conversations and address resistance.
- To start with, focus on education to increase awareness. As you move ahead in your initiative, provide training that provides skills in areas such as communicating across difference, handling conflict respectfully and applying Inclusion Lenses to policies and programs.

WHO SHOULD DELIVER THE TRAINING?

- If there are people within your organization who have expertise in Diversity and Inclusion, you can design and present the education internally.
- Hire a diversity consultant to provide training.
- Use a combination of the above and use a train-the-trainer approach and use a diversity educator to train staff or volunteers to provide training.

EDUCATION TOPICS

Here are some ideas for training topics related to Diversity and Inclusion.

<i>Diversity and Inclusion Education Topic</i>	<i>Training Objectives</i>	<i>Audience</i>
Foundational concepts of Diversity and Inclusion	<ul style="list-style-type: none"> • Increase awareness of the concepts of Diversity and Inclusion • Highlight the importance of being an inclusive organization 	<ul style="list-style-type: none"> • Diversity and Inclusion Committee • Board • Staff • Volunteers • Members
Knowledge and skills for becoming an inclusive program/organization	<ul style="list-style-type: none"> • Create an Inclusion Action Plan • Develop your own Inclusion Model • Apply inclusion lenses to your programs, policies and communication materials 	<ul style="list-style-type: none"> • Diversity and Inclusion Committee • Board • Staff
Ambassador program	<ul style="list-style-type: none"> • Learn how to implement an Ambassador program at your organization 	<ul style="list-style-type: none"> • Diversity and Inclusion Committee • Volunteer Ambassadors
Program review for Inclusion	<ul style="list-style-type: none"> • Practice applying a Program Inclusion Lens 	<ul style="list-style-type: none"> • Staff and volunteers responsible for programming • Program committee

10

DEVELOP AND IMPLEMENT AN AMBASSADOR PROGRAM

An Ambassador Program can help make your organization more welcoming and inclusive.

WHAT IS AN AMBASSADOR PROGRAM?

The goal of an Ambassador Program is to contribute to an overall vision of inclusion so that organizations feel welcoming to everyone and reflect the diversity of the community they serve.

WHAT IS AN AMBASSADOR?

An Ambassador is:

- An official representative of your organization
- A promoter and supporter of activities, events and programs

Ambassadors can help to ensure that all current and new citizens feel welcomed and included at your organization.

ROLE OF AN AMBASSADOR

The role of the Ambassadors will be to:

- Encourage current members to participate in ongoing programs.
- Orient people to existing programs and encourage them to participate.
- Share information about programs and activities to those who are not currently attending.

- Gather informal feedback on how programs and activities are meeting the needs of diverse members of the community, and provide this feedback to staff.
- Reach out to the community and encourage citizens to become members or active participants.

RESPONSIBILITIES OF AN AMBASSADOR:

- Commit to attending training to become an Ambassador.
- Make a commitment to be an Ambassador for at least six months.
- Attend meetings once a month with the Ambassador Coordinator and Ambassador Team.
- Be available one or two half days a week, or take on other Ambassador roles outside the organization.

11 PROMOTE STAFF AND BOARD DIVERSITY

To create a truly welcoming and inclusive organization, staff, volunteers and board members have to understand the importance of being welcoming and inclusive, be committed to the vision, values and goals of Diversity and Inclusion and have the competencies to put these into action. The following examples will focus on non-profit organizations with a volunteer board, but these principles can be applied in other settings.

BROADEN YOUR RECRUITMENT EFFORTS

Board and staff should reflect the diversity of the membership and more importantly, the diversity within the community that the organization serves.

For example, not for profit organizations often rely on word of mouth efforts to recruit new board members and staff. Although this may feel like a safe and comfortable approach, the potential pool of people identified through personal contacts may not reflect the diversity of the community your organization is trying to serve.

Establish a formal recruitment process so that you can reach out and attract as many diverse candidates as possible. As a starting point, here are some ideas to help you broaden your recruitment efforts.

Get the word out

Advertise new board and staff positions in a wide variety of places to reach as many people as possible. Send out postings to other organizations, cultural community groups, local community centres, local ethnic and community newsletters or newspapers and any other associations and organizations that serve the diverse demographic within your community. Allow yourself enough time to reach out as much as possible.

Highlight your commitment to Diversity and Inclusion

Potential candidates for staff and the board may have preconceived notions about whether their skills and talents would be welcomed in your organization. Include your vision and values of Diversity and Inclusion in the recruitment materials so that diverse candidates feel that they would be accepted, welcomed and valued.

MINIMIZE BIAS IN THE SELECTION PROCESS

Each one of us has biases that can creep into the decisions we make. Overt biases are known and recognizable preferences (e.g. stating that only women make good nurses). Implicit biases are automatic associations in our minds that unconsciously influence our actions (e.g. associating black with danger, men with science or non-English sounding names with an inability to communicate well).

We can minimize these biases (and make more valid, accurate and fair decisions), first by acknowledging that we may have them, and second, by using appropriate strategies to manage our biases.

Here are some strategies that can be used in the recruitment process:

Job descriptions

- In the job description for staff and board members, include general abilities and related work experience rather than specific knowledge. For example, instead of asking for knowledge about specific policies and procedures, ask about the ability to understand and apply policies and procedures. This does not provide an unfair advantage to “insiders” over “outsiders.”
- Focus on the desired ability or skill for the job instead of a personal trait. Instead of requiring a ‘mature, cooperative person’, ask for ‘ability to work effectively as a team member.’ Personal traits are subjective whereas skills and abilities can be more objectively measured.

Screening candidates

Consider hiding the names of candidates when screening résumés. Research shows that many Canadian employers show a bias towards traditional Anglophone names, likely making assumptions about language skills, values and experience. Replace names with candidate numbers for the résumé review phase to remove this name bias.

Focus on the content rather than the style of the résumé, as stylistic differences in format and content can easily lead to qualified candidates being screened out at early stages in the process. In many countries, a résumé might be ten pages long and provide great detail on each experience, while in Canada, the preference is for very concise résumés.

The interview process

- Make sure that the interview panel has diverse team members who are aware of the organization's goals of Diversity and Inclusion and can conduct an interview that minimizes bias.
- Ask all interview candidates the same questions and evaluate their responses using a scoring grid. Encourage the interview panel to check their assumptions about a person based on accents, dress style, body language and other non-verbal communication, and to be aware of how these assumptions impact how they evaluate a candidate.

Increase competencies

Staff and board members should have the competencies to work in a manner that reflects your values of inclusion.

Board and staff

Develop a set of Diversity and Inclusion related competencies for each staff position and for board members. Include a summary of these competencies in all job descriptions.

The recruitment process

Build into the recruitment process a means of assessing candidates' beliefs and values about Diversity and Inclusion, and ensure they have the skills to work in an inclusive manner.

APPLY AN INCLUSION LENS TO STAFF, BOARD AND VOLUNTEER RECRUITMENT

Questions to Ask:

Comments:

1. Are open positions posted where they are accessible to a range of potential applicants?

Always Sometimes Not at all

2. Do the postings use inclusive language and make it clear that applicants from diverse backgrounds are welcome to apply?

Always Sometimes Not at all

3. Do job postings accurately state the qualifications necessary to do the job and the duties of the job?

Always Sometimes Not at all

4. Are interviewers aware of and have experience in inclusive hiring processes?

Always Sometimes Not at all

5. Is staff aware of and have equitable access to training and development opportunities?

Always Sometimes Not at all

6. Is staff provided with training related to Diversity and Inclusion?

Always Sometimes Not at all

7. Are competencies related to Diversity and Inclusion part of job requirements and competencies (e.g. "is able to show respect for differences in backgrounds and viewpoints", "is able to adapt communication style", etc.)

Always Sometimes Not at all

8. Do staff, board and volunteers have the skills and competencies to be inclusive of all kinds of diversity?

Always Sometimes Not at all

BOARD DIVERSITY

Organizations can benefit greatly from having boards that reflect the communities they serve. Some of the advantages of a more diverse board include:

- Diverse perspectives in decision-making lead to better decisions.
- A diverse board can help build networks and cohesion among diverse populations.
- A diverse board can be more responsive to the community and clients.
- A diverse board can support fund raising and marketing/outreach more effectively.

STRATEGIES FOR A MORE DIVERSE BOARD

- Assess who is on your board. Is the diversity within the community you serve reflected in your board?
- Consider your organization's priorities related to inclusion for the next few years. What are some important goals for your organization that you want to achieve? (See the section on assessing inclusion at your organization). What skills, experience and knowledge will you need at the board level to help you achieve these goals? What gaps will be created by retiring board members?
- Develop an appropriate outreach strategy that will help you find the kinds of board members you need. Get the word out to cultural community groups, community centres, local ethnic and community newsletters or newspapers and any other associations and organizations that serve diverse demographics within your community.
- Allow enough time for recruitment of new members. For example, if your organization's AGM is scheduled for the fall, you may want to begin your outreach for new members as early as the spring to get word out.
- Recruit volunteers and board committee members from diverse communities. Ensure that their perspectives are valued and heard, and provide them with opportunities to take on leadership roles to build their capacity to become board members.
- Make new board members aware of your organization's vision, values and goals of inclusion and create opportunities for new members to participate in training and education related to Diversity and Inclusion.
- Have strategies in place to welcome and support new board members. Spend some time on orienting them to the people, policies and processes at your organization. Assign another board member as a mentor. Check-in regularly to ensure new members are feeling included and valued.

— Diversity in Governance: A Toolkit for Nonprofit Boards.

12

EVALUATE THE LEVEL OF INCLUSION AT YOUR ORGANIZATION

Becoming a welcoming and inclusive organization is an ongoing process and can take some time. It can be helpful to pause along the way to assess what progress has been made, and to review your initiative and strategies to see if you are headed in the right direction.

The following chart can be used as an assessment tool to follow the progress you have made. Here are some guidelines for the assessment:

There are six areas to assess:

- leadership commitment
- board and staff diversity
- decision making process
- sense of belonging
- programs
- communication and outreach

For each area, select the level that describes your organization (exclusion, diversity awareness, etc.).

The assessment can be conducted by your Diversity and Inclusion Committee (if you have one), or by any group of people who are working on enhancing inclusion at your organization and have enough information to carry out the assessment.

You may want to start with a baseline assessment at the beginning of your inclusion initiative and record your results. You can re-assess your organization every six months or so, and compare your results to those from your initial assessment.

	Leadership Commitment	Board, Staff and Volunteer Diversity	Decision Making Process
Exclusion	Board members and staff do not feel there are any barriers to inclusion, and there is no formal or informal commitment to enhance inclusion.	The organization has not made any effort to recruit board, staff or volunteers from diverse groups.	Decisions are made by a small group of people. Many feel excluded from decision making processes.
Diversity Awareness	There are few champions for Diversity and Inclusion, and they are trying to gather support for an inclusion initiative.	There is an awareness for the need for more diversity in the organization.	Effort is made to incorporate some diverse perspectives into the decision making process.
Working Towards Inclusion	Some board members and staff see the value of becoming more inclusive and have started to reflect on how to move ahead.	Efforts are being made to attract diverse applicants for board, staff and volunteer positions. Open and transparent recruitment processes are in place.	The board, staff and volunteers are working to create processes to invite and incorporate diverse perspectives.
Culture of Inclusion	The board has made a formal commitment to become inclusive, has approved an Diversity and Inclusion initiative and has allocated resources to the initiative.	Members from diverse groups are equitably represented on the board and with staff. Volunteers represent the diversity within the community.	Everyone has opportunity to contribute their perspectives. Diverse perspectives are valued and appreciated, and used as input into the decision making process.

	Sense of Belonging	Programs	Communication and Outreach
Exclusion	A small group of individuals feel a sense of belonging, but many feel unwelcome or excluded in the day-to-day activities of the organization.	Programs and services only meet the needs of a small group of members. There is a lack of awareness that programs may not be inclusive, or meet everyone's needs.	Communication and outreach activities are targeted to a few groups within the community.
Diversity Awareness	People are more aware of the need to be inclusive, but still struggle to welcome and include everyone.	There is awareness of the need to adjust current programs or provide new programs, but there is uncertainty about how to meet everyone's needs.	Communication and outreach activities have been reviewed for inclusivity and gaps have been identified.
Working Towards Inclusion	People are adjusting their attitudes and behaviors to try and be more welcoming and inclusive.	Some programs are adjusted and a few new programs are introduced to meet the needs of diverse members.	Outreach messages and activities are modified to use inclusive and accessible language and content.
Culture of Inclusion	All individuals feel welcomed and included.	Programs and services are fully inclusive and meet the diverse needs of members and other others in the community.	Communication and outreach activities reflect the organization's commitment to inclusion, and are representative of and accessible to diverse communities.

REFERENCES

A Toolkit for Serving Diverse Communities

U.S. Administration on Aging

Equity and Inclusion Lens Handbook

City of Ottawa

www.cawi-ivtf.org/sites/default/files/publications/ei-lens-handbook-2015_0.pdf

Inclusive Community Organizations: A Tool Kit. (2004)

Ontario Healthy Communities Coalition

www.ohcc-ccso.ca/en/inclusive-community-organizations-a-tool-kit

Giving Voice to Edmonton's Immigrant Seniors and Identifying Their Needs (2015)

Age Friendly Edmonton

aaisa.ca/wp-content/uploads/2013/02/AOW-DRAFT-Report-Zenev-and-Assoc-Aug-17-2015.pdf

MORE HELP

If you feel your organization has the capacity to conduct a more detailed assessment, you could use the following assessment tool:

Inclusive community organizations: A Tool Kit. (2004)

Ontario Healthy Communities Coalition. Tool #8: Organizational Self-Assessment Tool, page 69.

