

# Publicly Available Specification (PAS)

## The 50 – 30 Challenge

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# Foreword

## Publishing Information

This PAS was sponsored by the Standards Council of Canada in support of the Government of Canada's 50-30 Challenge, led by Innovation Science and Economic Development (ISED). Its development was facilitated by the Diversity Institute. The PAS came into effect August 10, 2021.

Acknowledgement is given to the following individuals and their organizations that were involved in the PAS as members of the Steering Group:

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- > Paz Sostenible
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- > Praxis Consulting
- > Public Policy Forum
- > Réseau des Femmes d'affaires du Québec
- > RevolutionHER Inc.
- > Rick Hansen Foundation (RHF)
- > SCWIST – Society For Canadian Women In Science & Technology

- > SFU VentureLabs
- > Small Business BC
- > Stepstone House
- > Surrey Board of Trade
- > The Canadian Centre for Diversity and Inclusion
- > The Finance Cafe
- > The Women In Need Society
- > Toronto Pflag
- > Tourism Burnaby
- > Uzima Women Relief Group International
- > Women Entrepreneurs of Saskatchewan (WESK)
- > Women in Capital Markets (WCM)
- > Women in Governance (WiG)
- > Women’s Enterprise Centre
- > Women’s Executive Network (WXN)

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#### Use of this document

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#### Presentational conventions

The provisions of this PAS are presented in roman (i.e. upright) type.

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Commentary, explanation and general informative material are presented in “NOTES” underneath each section where applicable.

#### Contractual and legal considerations

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# Introduction

## Diversity on Boards and in Senior Management

Advancing diversity and inclusion helps improve access to qualified talent, diverse markets, drive innovation, and even improve organizational performance. Current levels of diversity on boards and in senior management positions across Canada highlight that in 2020, among the 529 companies that disclosed diversity in leadership, 33% had no women executive officers, and only 6% had five or more women executive officers.<sup>1</sup> Out of 270 corporations disclosing diversity on boards, members of visible minorities, Aboriginal peoples, and people with disabilities represent 5.5%, 0.5%, and 0.4% of board positions respectively.<sup>2</sup> According to a recent Statistics Canada survey of Canadian charity and non-profit boards, 47% of participants stated that their organization does not have a written policy to promote diversity in its board of directors.<sup>3</sup>

In important ways, the 50 - 30 Challenge complements other dimensions of the Canadian Government's "whole of government" commitment to advance diversity and inclusion which include regulatory initiatives – Employment Equity Legislation, Pay Equity Legislation, and the Canada Business Corporations Act, – as well as a range of other policies and programs, such as the Women Entrepreneurship Strategy and the Black Entrepreneurship Program. These initiatives include supplier diversity, set asides and preferential procurement designed to advantage organizations owned by equity-deserving groups, unconscious bias training, application of Gender Based Analysis Plus (GBA+) lens and more.

## The 50-30 Challenge

The 50 - 30 Challenge (the Challenge) aims to promote voluntary action toward diversity on boards and/or in senior management. It invites organizations to participate and improve diversity and inclusion on their Canadian board of directors and/or senior management teams.

The Challenge asks that organizations aspire to two goals:

1. Gender parity ("50%" women and/or non-binary people) on Canadian board(s) and/or senior management; and
2. Significant representation ("30%") on Canadian board(s) and/or senior management of other equity-deserving groups including those identifying as:
  - > Racialized, Black, and/or People of Colour ("Visible Minorities")
  - > People with disabilities (including invisible and episodic disabilities)
  - > 2SLGBTQ+ and/or gender and sexually diverse individuals
  - > "Aboriginal" and/or Indigenous Peoples. The program and participants recognize First Nation Peoples, Métis Nation, and Inuit as founding Peoples of Canada and under-represented in positions of economic influence and leadership.



Canada is home to a variety of organizations operating in different regions and in different industries and sectors. To broaden participation and to address their unique needs, the Challenge is offered in three distinct streams adapted for different organization sizes:

- > Large corporations
- > Small and medium-sized enterprises (SMEs)
- > Post-secondary institutions, not-for-profits (including hospitals), charities, and agencies, boards and commissions (ABCs)

The streams allow participating organizations to strive to achieve the Challenge goals in ways that best suit and reflect their needs, acknowledging the variety of sizes and structures of organizations, including those without boards of directors or senior management teams.

The Challenge includes both 1) Organizations that meet the Challenge and 2) Organizations that are working towards the Challenge.

## Developing a Publicly Available Specification

In collaboration with Innovation Science and Economic Development Canada (ISED) and Standards Council Canada (SCC), the Diversity Institute at Ted Rogers School of Management (DI) leveraged Canada's standardization system to bring together diversity and inclusion experts and organizations to define key terms included in the Challenge and develop a Publicly Available Specification (PAS) on how to apply these definitions and implement the Challenge.

This PAS builds on preliminary research and a series of public consultations with key experts on diversity and inclusion as well as those representing small and medium enterprises, large businesses, non-profit organizations, charities, hospitals, post-secondary institutions and others. Their comments on an initial seed document, as well as written feedback, consultation recordings and transcripts, were analyzed. Suggestions were reviewed by the Steering Group and representatives from the Standards Council of Canada, ISED and other government departments, as well as those representing small and medium enterprises, large businesses, non-profit organizations, charities, hospitals, post-secondary institutions, and others.

This PAS gives recommendations and guidance on policies, practices, and approaches. It is intended to provide definitions and guidance on the terms and processes of the Challenge.

# 1 Scope

This document provides guidance on the Challenge for organizations. It is intended to be adaptable and scalable to the needs of a range of organizations, across sectors and of varying sizes. This document offers definitions of terms outlined in the Challenge, associated accountabilities and responsibilities for organizations meeting the Challenge and those working towards the Challenge. It also includes suggested measures, tools and indicators. It recognizes that each organization is different and that decision makers will need to determine the most appropriate approach to the Challenge based on the organization's context and stage of development. This document does not address issues of verification and certification which may be required by organizations and SCC/ISED at a later stage.

## 2 Normative References

While informed by extensive research, the Publicly Available Specification (PAS) relies heavily on definitions in existing legislation as well as those used by Statistics Canada, to ensure consistency and comparability. Several processes are currently underway to update terminology, for example, in the Employment Equity Act.

Throughout the document, the use of organizations encompasses institutions as well. The goals of the Challenge are explained below:

### 2.1 Gender Parity

The organization's board and/or senior management team include a minimum of 50% women and/or non-binary individuals.

Women refers to gender identity not biological sex (see below).

NOTE 1: Gender refers to “the gender that a person internally feels (‘gender identity’ along the gender spectrum) and/or the gender a person publicly expresses (‘gender expression’) in their daily life, including at work, while shopping or accessing other services, in their housing environment or in the broader community. A person's current gender may differ from the sex a person was assigned at birth (male or female) and may differ from what is indicated on their current legal documents. A person's gender may change over time.”<sup>4</sup>

NOTE 2: In Canada's legislation and regulatory frameworks, “woman” is often not defined.

NOTE 3: Organizations should be mindful of intersectionality and be intentional in their efforts to increase gender parity of women and/or non-binary individuals from different backgrounds.

NOTE 4: Organizations, particularly those smaller in size, may fluctuate in meeting the 50% goal of the Challenge during board/senior management personnel transition periods. As such, remaining within a zone of 40% to 60% during turnover, recruitment, and promotion periods may occur.

## 2.2 Significant Representation

A minimum of 30% of members of boards and/or senior management teams are comprised of equity-deserving groups outlined in the Challenge as those identifying as: Racialized, Black, and/or People of Colour (“Visible Minorities”), People with disabilities (including invisible and episodic disabilities), 2SLGBTQ+ and/or gender and sexually diverse individuals, and “Aboriginal” and/or Indigenous Peoples. The program and participants recognize First Nation Peoples, Métis Nation, and Inuit as founding Peoples of Canada and under-represented in positions of economic influence and leadership.

These targets are clearly defined; however, they are not mutually exclusive. For example, a racialized woman may be included in both the gender parity and significant representation categories given considerations related to intersectionality.

NOTE 1: The equity-deserving groups outlined in the Challenge follow the designated groups outlined in the Employment Equity Act with the addition of 2SLGBTQ+ and/or gender and sexually diverse individuals.

NOTE 2: The term equity-deserving recognizes groups that deserve equity due to marginalization. This term differs from equity-seeking, which places control and power on others to provide and deny equity.

NOTE 3: Flexibility is afforded to organizations to achieve significant representation of equity-deserving groups (30% spread across all four groups) in ways that are considerate of context, region, and others. Organizations are expected to make an effort to ensure that significant representation is found across all four categories of equity-deserving groups.

NOTE 4: While immigrants are not a designated group, we recognize that a large proportion of Black and racialized people are also immigrants which, like other dimensions of diversity, adds another layer of challenge and opportunity.

## 2.3 Board of Directors

The structure of a board of directors differs across an organization’s context and structure for decision-making. Directors manage, or supervise the management of, the business and affairs of a corporation. For example, Canadian corporations:

- > Have at least one director and generally have at least three board members. An individual can be the sole shareholder, director and officer of an organization.
- > Specify the number of directors in its articles of incorporation.
- > Hold an annual general meeting wherein its shareholders or members elect the directors by a majority of votes.<sup>5</sup>

NOTE 1: The Challenge applies to Canadian boards and does not apply to companies and/or organizations with boards in the U.S. or overseas.

NOTE 2: Not all organizations have a board of directors. Some have governing councils (for example universities) or advisory committees (for example start-up ventures).

NOTE 3: In some cases, the board is not elected by members or shareholders.

NOTE 4: Some organizations have other forms of foundational corporate documents such as letters patent or a specific regulatory instrument that serves as the functional equivalent of articles of incorporation.

## 2.4 Senior Management

Senior management refers to those who plan, organize, direct, control and evaluate, through middle managers. Specific titles will vary across sectors. The senior management team may consist of the following:

- > President
- > Chief executive officer and chief financial officer
- > Vice-presidents in charge of a principal business unit, division or function, including sales, finance or production
- > anyone who performs a policy-making function within the organization.<sup>6</sup>

NOTE 1: The Challenge remains flexible to support organizations of all sizes and structures, including those without a board or a traditional senior management structure. The definition of “senior management” will depend on the organization’s context and structure for decision-making and can include individuals with significant decision-making responsibilities, executives, and others. Organizations must clearly define what positions constitute senior management in their organization and continue to use this definition during reporting processes.

NOTE 2: Organizations may also consult the National Occupational Classification (NOC) structure<sup>7</sup> that provides definitions for senior management for various sectors.

# 3 Terms and Definitions

## 3.1 Equity-Deserving Groups

The Challenge’s equity-deserving groups include those identifying as: Racialized, Black, and/or People of Colour (“Visible Minorities”), People with disabilities (including invisible and episodic disabilities), 2SLGBTQ+ and/or gender and sexually diverse individuals, and “Aboriginal” and/or Indigenous Peoples. The program and participants recognize First Nation Peoples, Métis Nation, and Inuit as founding Peoples of Canada and under-represented in positions of economic influence and leadership.

NOTE 1: Canada’s Employment Equity Act defines four “designated groups” – “women”, “members of visible minorities”, “persons with disabilities” and “Aboriginal peoples.”<sup>8</sup> While there has been considerable debate about these terms, and they are currently under review, they remain protected groups under law and so must be referenced.

### **3.2 Racialized, Black, and/or People of Colour (“Visible Minorities”)**

There is little consensus on the terminology that should be used but this refers to people who identify as:

- > Arab
- > Black
- > Chinese
- > Filipino
- > Japanese
- > Korean
- > Latin American
- > South Asian (e.g., East Indian, Pakistani, Sri Lankan)
- > Southeast Asian (e.g., Vietnamese, Cambodian, Laotian, Thai)
- > West Asian (e.g., Iranian, Afghan)
- > Other (please specify)<sup>9</sup>

NOTE 1: The term “visible minorities” is used in Canadian legislation including the Employment Equity Act.<sup>10</sup>

NOTE 2: The use of the term Racialized, Black, and/or People of Colour is meant to reflect the socially constructed notion of race while recognizing the systemic oppression and racism experienced by individuals and groups based on skin colour and appearance. The definition is inclusive of bi-racial and mixed-race individuals. It should be noted that many individuals may prefer to self-identify with more specific identities (e.g. “Black”, “Indo-Canadian”, etc.)

### **3.3 2SLGBTQ+ and/or gender and sexually diverse individuals**

2SLGBTQ+ refers to Two-Spirit, Lesbian, Gay, Bisexual, Transgender, Queer individuals and other gender and sexually diverse individuals.

NOTE 1: There are many different acronyms that may be used by various communities. Acronyms like these may combine sex, gender, sexual orientation and sex characteristic attributes into one community. This combination may or may not be appropriate in all circumstances. Limitations exist with any acronym meant to represent individual identities,

and various other acronyms exist including those that focus on identities such as LGBT, LGBTI and 2SLGBTQIA. Some may focus on grounds as they may appear in human rights legislation such as Sexual Orientation, Gender Identity, Gender Expression, Sex Characteristics. In some cases, members of these groups are identified as Gender and Sexual Minorities. The terms are overall meant to include all individuals who are part of communities that face barriers to employment and advancement because they are intersex\*, not cisgender\* and/or not heterosexual\*.

\*Intersex: defined as people “born with physical, hormonal or genetic features that are neither wholly female nor wholly male, or a combination of female and male.”<sup>11</sup>

\*Cisgender: “relating to, or being a person whose gender identity corresponds with the sex the person was assigned at birth.”<sup>12</sup>

\*Heterosexual: “relating to a person who is attracted only (or almost only) to a singular gender that is different from their own”<sup>13</sup>

NOTE 2: The plus included in the acronym accounts for fluidity of identity, the changing nature of acronyms, and the recognition that no single acronym is sufficient in capturing the full scope and spectrum of identities.

### **3.4 People with disabilities (including invisible and episodic disabilities)**

Disability is any physical, mental, intellectual, cognitive, learning, communication or sensory difference or functional limitation — whether permanent, temporary or episodic in nature, or evident or not, that, in interaction with society, hinders a person’s full and equal participation.<sup>14</sup>

NOTE 1: The definition is intended to reflect the notion that disabilities are socially constructed, meaning they emerge from the relationship between the individual and society, and the definitions are fluid and meant to cover the full range including episodic disabilities. Disability is “a complex phenomenon, reflecting an interaction between features of a person’s body and mind and features of the society in which they live. A disability can occur at any time in a person’s life; some people are born with a disability, while others develop a disability later in life. It can be permanent, temporary or episodic. Disability can steadily worsen, remain the same, or improve. It can be very mild to very severe. It can be the cause, as well as the result, of disease, illness, injury, or substance abuse.”<sup>15</sup>

NOTE 2: Organizations are encouraged to take a person-first approach when defining disability and recognize societal and workplace barriers (physical and non-physical) that limit an individual’s full and equal participation.

### **3.5 “Aboriginal” and/or Indigenous Peoples**

Indigenous Peoples refers to the original peoples of North America and their descendants. Indigenous Peoples refers to individuals identifying themselves as ‘First Nation Peoples, Métis Nation or Inuit’.<sup>16</sup> These are distinct Peoples with unique histories, languages, cultural practices, and spiritual beliefs.

NOTE 1: The term ‘Aboriginal’ is used in legislation and in international definitions.

NOTE 2: Indigenous Peoples may self-identify as such or may be defined by their own relations to their communities.

### **3.6 SMEs**

Small and Medium Enterprises are those with 1-499 full time, regular employees.<sup>17</sup>

NOTE 1: The Challenge also covers start-ups and sole proprietorships which may not have full time regular employees.

### **3.7 Large Corporations**

Large Corporations are those with 500 or more full time regular employees.<sup>18</sup>

### **3.8 Non-profit Organizations**

A non-profit organization is a “club, society, or association that is not a charity and that is organized and operated solely for:

- > social welfare
- > civic improvement
- > pleasure or recreation
- > any other purpose except profit”<sup>19</sup>

NOTE 1: Hospitals, churches/religious institutions, and trade associations are included.

### **3.9 Post-Secondary Institutions**

Public and private post-secondary institutions are ““recognized,” “authorized,” “registered,” or “licensed” by government, or they may not be regulated in any way. All public and private “recognized” and “authorized” postsecondary institutions in Canada have been given the authority to grant academic credentials by their provincial or territorial governments through charters or legislation that ensures or enables mechanisms for institutional and program quality. “Registered” or “licensed” institutions are monitored by government primarily for

consumer protection, rather than for institutional or program quality. In some jurisdictions, there are processes for program approval or for voluntary accreditation for private colleges.”<sup>20</sup>

### 3.10 Registered Charities

A registered charity refers to “a charitable organization, public foundation, or private foundation registered with the Canada Revenue Agency.”<sup>21</sup> Further, “it must be established and resident in Canada, operate for charitable purposes, and devote its resources to charitable activities.”<sup>22</sup>

### 3.11 Agencies, Boards, and Commissions

“Agencies, Boards and Commissions are established to carry out administrative, quasi-judicial, regulatory and advisory functions within an established policy and legislative framework. These functions are by no means mutually exclusive, and many agencies carry out multiple roles.”<sup>23</sup> They exist at the federal, provincial and municipal levels.

NOTE 1: The definitions vary from jurisdiction to jurisdiction.

## 4 Targets and Data Collection

### 4.1 Participating Organizations

Organizations should support the aspirations of the Challenge, namely, the two goals:

1. Gender parity (“50%” women and/or non-binary people) on Canadian board(s) and/or senior management; and
2. Significant representation (“30%”) on Canadian board(s) and/or senior management of other equity-deserving groups, including those identifying as:
  - > Racialized, Black, and/or People of Colour (“Visible Minorities”)
  - > People with disabilities (including invisible and episodic disabilities)
  - > 2SLGBTQ+ and/or gender and sexually diverse individuals
  - > “Aboriginal” and/or Indigenous Peoples. The program and participants recognize First Nation Peoples, Métis Nation, and Inuit as founding Peoples of Canada and under-represented in positions of economic influence and leadership.

The Challenge provides two different paths for organizations: participating organizations that have successfully met the Challenge requirements; and participating organizations working towards the Challenge.



Participating organizations that successfully meet the Challenge meet the numerical representation requirements of 50% women and/or non-binary individuals and 30% equity-deserving groups on boards and/or in senior management positions. Participating organizations may also wish to report on their efforts in implementing the diversity indicators and practices with shareholders or members, proxy advisors, investors and regulators and other key stakeholders in their context at their annual general meetings or by publishing periodic public reports, etc. (see Section 5 on Diversity Practices and Indicators).

Participating organizations committed to working toward achieving the Challenge should develop clear targets and timelines for achieving 50% women and/or non-binary individuals and 30% equity-deserving groups on boards and/or in senior management positions.

## **4.2 Target Setting**

Participating organizations committed to working toward achieving the Challenge should adopt targets for achieving gender parity (50%) and significant representation (30%) for the board of directors and/or for senior management. The target should be expressed as a percentage and should indicate the specific date. Ideally organizations should indicate the target for each equity-deserving group. “No target adopted” should be indicated if the organization has not adopted a target for a specific designated group and organizations should explain why a target has not been adopted following a ‘comply or explain’ model.

## **4.3 Self Identification and Data Collection**

Tracking data with respect to gender parity and significant representation will depend on self-identification. There are several issues with the self-identification of individuals. Some people choose not to self-identify because of concerns about stigmatization or discrimination. On the other hand, where self-identification is perceived to be associated with potential benefits – employment, funding, advancement - individuals may falsely self-identify. No formal verification is required to participate in the Challenge. However, where participation in the Challenge is used to confer benefits (for example in the case of procurement) participants may need to be prepared to provide documentation sufficient to support their claim as appropriate for the circumstances.

It will remain an organization’s responsibility to respect an individual’s privacy and right to voluntary disclosure. Organizations participating in the Challenge should specify the purposes of the data collection, who has access to the data, how it will be retained, and what will be publicly available. They may administer the collection of data or rely on a third party.

## **4.4. Reporting Requirements**

Currently, there are no plans to require formal reporting to an external agency. Reporting on progress may take place quarterly, bi-annually, annually, or another cycle that aligns best with the organization’s existing reporting structures. Organizations should report on their target timelines for the Challenge goals. Organizations may also report on their progress on the proposed diversity practices and indicators (see Section 5 on Diversity Practices

and Indicators). Reporting efforts would be incorporated into the organization's current public reporting practices including annual reporting, shareholder meetings, and others. The 'comply or explain' model of reporting applies, where if a target has not been set or progress has not been made, an explanation should be provided. (See annex 1 and 2 for sample forms). Given that the Challenge is voluntary, there are no penalties for non-compliance.

## 5 Diversity Practices and Indicators

### 5.1. Wide Ranging Approaches

There are a wide range of tools and checklists available internationally that are intended to support organizations increasing the representation of women and equity deserving groups on boards and/or in senior management positions and to create more inclusive organizations. Organizations participating in the Challenge operate in different context and are at different stages in their processes. The following set of diversity practices and indicators are intended to provide examples of policies and practices that may help increase representation and promote inclusive organizations. Indicators associated with these practices may be qualitative or quantitative.

### 5.2. Governance, Leadership, and Strategy

This section focuses on strategies to increase diversity and inclusion in governance, specifically on boards and/or in senior management. Participating organizations may wish to consider:

- > A clearly articulated case for diversity and inclusion that recognizes the benefits of diverse leadership to the sustained success of the organization.
- > A board policy stating that the organization will identify and nominate women and/or non-binary individuals and equity-deserving candidates including "Aboriginal" and/or Indigenous Peoples, People with disabilities (including invisible and episodic disabilities), Racialized, Black, and/or People of Colour ("Visible Minorities") and 2SLGBTQ+ and/or gender and sexually diverse individuals.
- > A personal diversity plan including targets, activities, responsibilities, and timelines as part of performance reviews.
- > A skills matrix to assess the qualifications of board members and senior leaders and which includes specific diversity characteristics as needed attributes to help the board oversee the organization's purpose and strategy.
- > Guidelines and specialized mandatory training for board members and senior leaders on diversity and inclusion.

- > Term and tenure limits for directors or other mechanisms of board renewal, as well as clear succession planning.
- > A diversity lead or committee responsible for overseeing policies and targets achieved reporting on a regular basis to the board.
- > A strategy for recruiting, onboarding, mentoring and retaining women and/or non-binary individuals and equity-deserving board members.

### 5.3. Talent - Recruitment, Selection, Promotion, and Separation

This section focuses on ensuring diversity and inclusion in an organization's recruitment, selection, promotion, and separation strategies and processes. Participating organizations may wish to consider:

- > A clearly defined human resources strategy which addresses diversity and inclusion.
- > Systematic job design, definition of competencies and necessary qualification.
- > A clear talent acquisition strategy focused on diversity and inclusion.
- > Job postings which reflect diverse competencies (including a mix of technical/job specific skills, soft/interpersonal/people skills, and credentials), value transferable skills and experiences, and are free of gendered or biased language and are widely available.
- > Recruitment practices to identify women and/or non-binary individuals and equity-deserving groups as candidates for senior management positions through succession planning and recruitment.
- > Broad outreach and use of diverse recruitment channels including seeking candidates from various sources through traditional media and advertising, hiring from within the organization pipeline, shareholder referrals, obtaining suggestions from advocacy organizations, using executive search firms with an expertise in gender-diverse and equity-deserving candidates.
- > Open and transparent access to co-op placements, summer jobs and internships.
- > Selection processes which reduce bias including diverse hiring committees.
- > Mandatory training on bias free selection processes for those involved in hiring and supervision.
- > Salary disclosures and salary grids during recruitment to ensure transparency around pay early on in the hiring process.
- > Transparency regarding promotion practices and career planning systems.
- > Mentoring and sponsorship for high potential women and/or non-binary individuals and leadership candidates from equity-deserving groups.

- > Employee resource groups to support women and/or non-binary individuals and equity-deserving groups.
- > Opportunities for skill building, training and education.
- > Transparent performance appraisal and reward systems.
- > Mandatory EDI training as part of orientation and professional development for all employees.
- > Exit interviews and tracking of separations.
- > Coaching on micro-aggressions, allyship and difficult conversations.

#### 5.4. Culture and Values

This section focuses on developing organization-wide policies focused on ethics, diversity, inclusion, among others, and implementing efforts to foster an inclusive workplace culture. Participating organizations may wish to consider:

- > Equity, diversity and inclusion policy and statement of values which is communicated and understood throughout the organization.
- > Using a gender and diversity lens when planning and hosting social events and celebrations.
- > Diversity and inclusion policies including anti-discrimination, harassment and bullying, accessibility as well as grievance and disciplinary procedures and a code of ethics that applies to all facets of the entity and all workers.
- > Inclusive paid parental leave policies, health care and family care provisions.
- > Flexible work arrangements including part time work, job sharing, and flexible hours.
- > Support for child-care.
- > Mandatory training on equity, anti-discrimination, anti-Black racism, diversity, inclusion, accessibility, and related obligations.
- > Employee engagement surveys to track inclusion and belonging in the organization disaggregating gender and diversity where appropriate.
- > Promotion and celebration of women and/or non-binary individuals and equity-deserving groups as role models.
- > Support for health and mitigating stress.
- > Innovative assistive technologies and accommodations.

## 5.5. Measurement and Tracking Equity, Diversity, and Inclusion

This section focuses on efforts for clear and transparent processes for measuring and tracking diversity and inclusion in an organization. Participating organizations may wish to consider:

- > Targets for achieving gender parity and greater diversity in leadership.
- > Targets for achieving gender parity and greater diversity on its board (where applicable).
- > Processes to track diversity on the board and/or in leadership.
- > Processes for analyzing gender and diversity in the pipeline from applications through to retirement.
- > Transparent processes for reporting on targets.
- > Accountability mechanisms for gender and diversity targets tied to performance management systems.
- > A gender pay-gap review across the organization.
- > Gender and diversity assessments using internal and external specialists with clear mechanisms for adopting change based on feedback.

## 5.6. Diversity across the Value Chain

This section focuses on promoting diversity and inclusion across the value chain. Participating organizations may wish to consider:

- > Supplier diversity and procurement.
- > Investing and funding for services/products provided by organizations led by women and/or non-binary individuals and equity-deserving groups entrepreneurs.
- > Gender and diversity lens applied to research and product/service development processes.
- > Gender and diversity lens to products, services and programs.
- > Gender and diversity lens on branding, marketing, sales and promotion.
- > Gender and diversity lens on services and customer/client supports.
- > Gender and diversity lens on language and images of communication.

## 5.7. Outreach and Expanding the Pool

This section focuses on engaging/supporting diverse individuals/groups in the ecosystem and applying a diversity and inclusion lens to outreach initiatives. Participating organizations may wish to consider:

- > Partnerships with organizations in the ecosystem to develop the pipeline of the next generation of diverse leaders.
- > Partnerships to support alternative pathways for women and/or non-binary individuals and equity-deserving groups.
- > Linkages to diverse supplier councils (e.g., Canadian Aboriginal and Minority Supplier Council, Canadian Council for Aboriginal Business, Canada's LGBT+ Chamber of Commerce, Women Business Enterprises, WEConnect, Inclusive Work and Supply Council) etc.
- > Gender and diversity lens applied to philanthropic activities.
- > Engagement on important gender and diversity policies as part of government relations activities.
- > Communicating the importance of diversity and inclusion to stakeholders – suppliers, clients, partners, educational institutions.

# Annex 1: Sample Form - Organizations that Meet the 50-30 Challenge

Date of the disclosure \_\_\_\_\_

(Indicate the date of the disclosure. The information disclosed should reflect the structure of the organization as of the date of the disclosure).

The participating organization has achieved gender parity and significant representation of equity-deserving groups on boards and/or in senior management positions. Given intersectionality, an individual may be counted in more than one spot in the table. Please fill in the table.

Organizations that meet the Challenge Reporting Form

	<b>Women and/or non-binary individuals (Target 50%)</b>		<b>People with disabilities (including invisible and episodic disabilities)</b>		<b>“Aboriginal” and/or Indigenous Peoples</b>		<b>Racialized, Black, and/or People of Colour (“Visible Minorities”)</b>		<b>2SLGBTQ+ and/or gender and sexually diverse individuals</b>		<b>Total equity-deserving (Target 30% across all four groups)</b>		<b>Undisclosed individuals</b>	
	Number	%	Number	%	Number	%	Number	%	Number	%	Number	%	Number	%
Board of Directors														
Senior Management														
<b>Total</b>														

## Annex 2: Sample Form - Organizations working toward the 50-30 Challenge

Date of the disclosure \_\_\_\_\_

(Indicate the date of the disclosure. The information disclosed should reflect the structure of the organization as of the date of the disclosure).

The participating organization is working toward gender parity and significant representation of equity-deserving groups on boards and/or in senior management positions. Please fill in the table.

Organizations working toward the Challenge Reporting Form

	Women and/or non-binary individuals (50%)		People with disabilities (including invisible and episodic disabilities)		Racialized, Black, and/or People of Colour (“Visible Minorities”)		“Aboriginal” and/or Indigenous Peoples		2SLGBTQ+ and/or gender and sexually diverse individuals		Total equity-deserving (Target 30% across all four groups)	
	Target	Date	Target	Date	Target	Date	Target	Date	Target	Date	Target	Date
Board of Directors												
Senior Management												
Total												

If no target is adopted, please specify why for each:



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