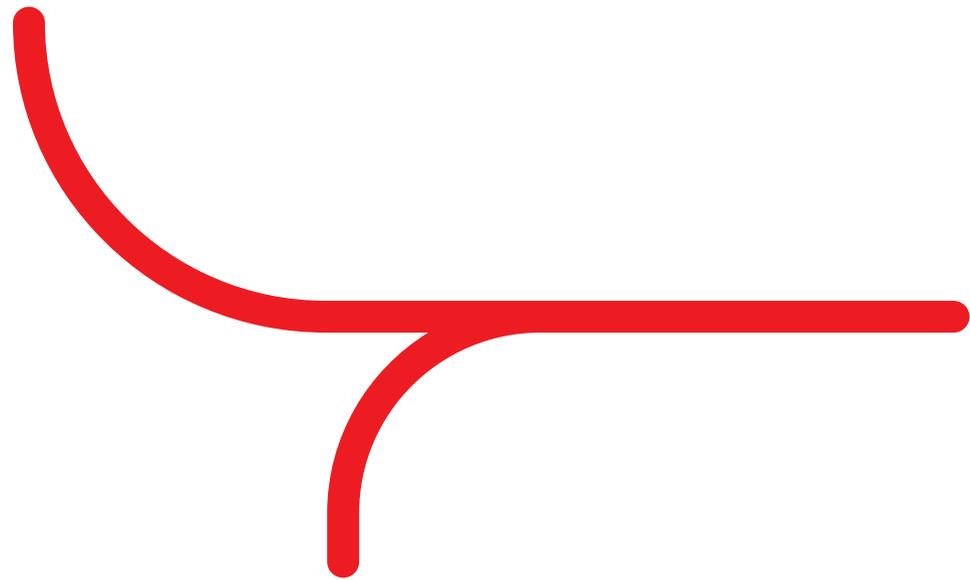


FROM THE MIND



TO THE HEART:

Advancing Equity In
Corporate Social Investment

IM△GINE
CANADA



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Imagine Canada is a national charitable organization whose cause is social good in Canada. We work to bolster the charities, nonprofits, and social entrepreneurs that build, enrich, and help to define our nation and the communities they support around the globe. For over a decade, Imagine Canada's corporate community investment research has provided a unique view of current practices and tools for effective social impact.

AgentsC Inc. is an international, B-Corp Certified consulting company based in Toronto, Canada. Founded in 2015, AgentsC offers strategic solutions to socially and environmentally conscious organizations around the world. Drawing on the African tradition of Ubuntu (I am because we are), AgentsC is guided by our trademark principle, Equity Philanthropy™ – the belief that love of community

and social justice form an essential alchemy for tackling the world's biggest problems, as expressed through the United Nations Sustainable Development Goals, and the World Health Organization Social Determinants of Health.

This research, conducted by AgentsC, provides data-supported perspectives and insights that will empower corporate community investment professionals to tailor practices and strategies to incorporate justice, access, inclusion, diversity and equity (JAIDE) principles that will help them achieve their missions.

Those who were quoted have reviewed this report and confirmed their intended meaning was expressed accurately, and we thank them for their candid contributions.

This study was made possible thanks to the generous support of Imagine Canada's National Partner, RBC Foundation.



Foundation

Preface



Preface

Nearly two and a half years into the COVID-19 pandemic, the ensuing racial reckoning and rallying cry for justice, resulting from the murder of George Floyd and Black people killed through acts of anti-Black racism, has taken corporate social responsibility (CSR)¹ and philanthropy to an inflection point — an opportune time for reflection and assessment.

Companies are committing millions of dollars in community investment to move society towards greater social and environmental sustainability amidst growing global catastrophes. While contributions of corporate Canada through their CSR programs are well intended, we are asking ourselves whether these investments will truly create social impact for all within our communities: *How have commitments to **justice, access, inclusion, diversity, and equity** (JAIDE)² shaped CSR practices? How has JAIDE impacted the perspectives of corporate community investment practitioners? Have companies incorporated JAIDE into their organizational practices in addition to their CSR? How are CSR practices helping or hampering JAIDE? How are the voices of Black, Indigenous, 2SLGBTQI and other marginalized people being heard within the corporate social impact community?*

While all of these questions are integral to the present discussion and will be addressed throughout, it is this last question that is at the heart of this particular story. The focus of this report, the first of a two-part series, is a response to existing studies on CSR and corporate community investment in Canada and the overlooked perspectives of marginalized groups in favour of stories told by the majority of CSR practitioners. We bring forth the unique perspectives of Black, Indigenous, South Asian, South Asian-Muslim, and 2SLGBTQI CSR practitioners involved in their companies' community investment departments, whose perspectives are paramount to understanding, for any company that wishes to advance equity through their community investment.

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The second report of this series focuses on diverse youth who are studying CSR as part of their undergraduate and postgraduate studies. Overall, through interview, survey, and focus group methods³, we learned that the voices of the diverse, when provided the opportunity, afforded rich insight, and at times, challenged widely-held views within the conventional CSR setting. They provided deeper perspectives into common yet overlooked experiences of diverse CSR practitioners, and challenged some predominant assumptions and narratives around doing social good. As such, we, the researchers, felt that as the study attempts to gauge the current CSR climate against JAIDE practices, the perspectives of those most likely to be impacted by JAIDE—the diverse and underrepresented in CSR—would provide a useful mirror and starting point.

The intention is not to make fundamental a particular group by their culture, race, gender, sexuality, or some other notions of diversity, inclusion, or equity, nor to pit

one group against another. Rather, we hope that the diverse collection of voices and fuller narratives included here paints a richer picture of the complexities and issues at stake within CSR when applying JAIDE practices, and helps to shed light on a meaningful path forward.

AgentsC and Imagine Canada, supported by the RBC Foundation, explored ways to capture new perspectives on Canada's CSR landscape while also building a body of evidence that points to the need for change within CSR practices. Our mixed methods research combined data gathering and an investigative style of traditional storytelling through authentic first-person narratives to garner rich insight into the human experience of on-the-ground CSR practice.

An example of the benefit of a mixed methods research process that breaks from traditional research practices is an ability to amplify diverse voices. Given our knowledge about underrepresentation of excluded groups within CSR practice, we proactively sought to gather the opinions

and thoughts specifically of these CSR practitioners within our network, as statistically representative participation would most likely have led to minimal participation of Black, Indigenous, 2SLGBTQI, other marginalized people, and youth groups.

Another advantage of our unique approach is that it allows us to escape rigid and impersonal research methodologies that prioritize scientific objectivity over inclusivity. Trust-building within our research context required an emotional connection between us and our storytellers, so that they would feel confident to share their most heartfelt and compelling stories. This is true specifically for marginalized people who may believe that their perspectives will be used against them, ignored, or misunderstood by researchers.



Transforming Community Investment

Transforming Community Investment

We believe corporate community investment in Canada is in need of a radical transformation. Questions are being asked: *Who makes the decisions about where a corporation should allocate donations and social investments? How are those decisions made? How much of those dollars should be given to specific nonprofit organizations?*

One emerging fact is clear: the majority of people who make decisions about social impact in corporate Canada appear to be white, middle-age, and middle-class females. At the same time, nonprofit organizations led by Black and Indigenous people report being significantly underfunded.⁴ Both Black and Indigenous organizations each receive one percent or less of Canada's philanthropic dollars from foundations (corporate or otherwise).⁵ This is despite Black and Indigenous people constituting an estimated 8.5% of Canada's population.

Relations between the corporate sector and the nonprofit sector reflect a power imbalance that has remained for over a century. Philanthropy, corporate or otherwise, should be practised with a greater focus on equity in Canada.

The work of activist, author, and social justice philanthropy expert

Edgar Villanueva points to the need to dismantle colonized approaches to philanthropy, including corporate community investment. His work is most striking in its assertion that Indigenous traditions, culture, and practices, and not the legacy of white majority culture, should underpin philanthropic practices. Villanueva writes about creating a more equitable, democratic, and community-oriented approach to giving. This is an important reference point for all CSR practitioners, yet few of Canada's corporations appear to understand or engage in decolonized practices. We conducted a survey of Canada's largest companies and had in depth conversations with associated CSR practitioners, only to find little evidence of and reference to new and pioneering methodologies: typically, the corporation makes decisions about giving, and a fortunate nonprofit organization gets the funds.

Yet, new approaches such as community-centric fundraising and trust-based philanthropy are actively being pursued in small pockets of CSR practice. As we have seen in our study, such approaches do appear to be driven by Black, Indigenous, 2SLGBTQI, South Asian, South Asian-Muslim, and youth professionals, who adopt diverse attitudes about forms of giving, and spoke the most about how their race, sexuality or age enabled them to view CSR with a greater emphasis on JAIDE.

This report—the first of our two-part series—is centred on the amplification of important, diverse voices within the CSR profession. The findings show how these viewpoints may hold the key to wider systemic change across Canada's CSR landscape, thereby improving current approaches toward positively and more equitably impacting Canadian communities.



The Multiplicity of JAIDE (justice, access, inclusion, diversity and equity)

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The Multiplicity of JAIDE

By Whom, For Whom, and to What End?

Whether we call it JAIDE, IDEA, DE&I, EDI, JEDI, or some other permutation of the words inclusion, equity, access, diversity, and justice, what was striking during the course of this study were the differences in how the principles were interpreted and set as goals within a CSR setting. For one Black respondent, whose views stemmed from decades spent in both traditional corporate and new CSR settings, JAIDE was spoken of in terms of practice—how the principles directed practical outcomes and lifelong benefits for the groups served by CSR. For instance, the community investments of a JAIDE-focused corporation would further JAIDE goals, such as supporting the long-term educational and professional successes of Black youth:

How do we change up our game as Black people to create intergenerational wealth? How do we change up our game to make sure our young people are going into particular career fields? For instance, how do we make sure our young Black girls go more into engineering and sciences?

For this same individual who had witnessed, over decades, the slow efforts at implementing JAIDE, the disconnect between principle and action appears to be just as prevalent today. This disconnect cross-cuts all levels of organization, and often results in seemingly misdirected energy, such as prioritizing diversity without its integral counterpart—inclusion. Another misstep is not understanding the complexities of Blackness and not recognizing the myriad diverse regions, ethnicities, and cultures of those from the African continent, and those of the diasporas of the Americas, Caribbean, Europe, and the UK, to name a few distinctions. Given the uniqueness of histories, experiences, and current struggles, it is conceivable that ideas like JAIDE and decolonization would be nuanced and resonate differently.

Then you have the African francophones, Senegal, Côte d'Ivoire, etc. Then you have the English speaking Africans and I've seen it in a room. It's just a really weird thing when you go into a room to speak to what you think of [as] Black people. They're separated into the little corners and the little groups. So I think there are lots of things there that create nuances that are not as evident in other parts of the country where it's maybe a straightforward, okay - here's the Black folk and there's the white folk, right?

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The Multiplicity of JAIDE

Interestingly, one Indigenous 2SLGBTQI interviewee expressed just how JAIDE, or other versions of it, didn't resonate with the outlook or approach to community investment within Indigenous traditions. For one, neither justice nor equity, nor even inclusion, aptly captures the essence of conciliation and reconciliation—concepts that are more resonant with the Indigenous peoples. This view was echoed by another Indigenous interviewee, who noted that JAIDE didn't offer enough of a backward glance into the history of injustice and inequity and the persistent aftermath faced by Indigenous peoples:

What I do get concerned about is that, is there enough and adequate conversation and training of understanding the difference between JEDI, DEI versus truth and reconciliation? Because I do get concerned that corporations are losing sight that there is a difference. And that the journey of DEI and JEDI, as much as it certainly supports the Indigenous population, is not a substitute for the work that needs to be done on truth and reconciliation.

Additionally, the act of doing social good was more accurately thought of in terms of reciprocity and self-determination than JAIDE. That is, there is a responsibility to meet people where they are at and to give back; moreover, Indigenous philanthropy

must be Indigenous-led. Other concepts expressed, such as authenticity and sovereignty, emphasize this type of genuine care for one another and people's free will. As two interviewees, both Indigenous, explained:

So it's reciprocal. There's a reciprocity, which is not, it is not based in justice, access, diversity or equity. [The work of their community investment] based on thousands of years of how we've always engaged, how we continue to engage. I'm not making anything new. I'm just applying it to philanthropy.

For me, the path of truth and reconciliation is the path of the journey from the mind to the heart. [...] What we are seeking is not just simply righting wrongs through truth but in reciprocity, having a connection of human to human, heart to heart in reconciliation, to really feel and understand what our journey has been. It is about conversation and connection through the heart that needs to take place with elders, knowledge keepers, our grandfathers and our grandmothers. It is about a bigger conversation of how do we journey together forward?

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It's about inclusion of our hearts, not just about the mind of understanding, but actually through compassion, feeling and moving through what has held us back as a community and a Country and where we need to get to, to feel whole again. I find that in corporations conversations on DEI tend to be about doing the right thing from a mind perspective, which is important, but we need to move to how do we experiencing together. What we're talking about here is a deeper relationship. How to put into practice DEI action plans into connecting our hearts in reconciliation. How does a corporation feel and be vulnerable in compassion?

These different perspectives challenge our notion of JAIDE as a comprehensive principle and practice: for one, implicit within this concept are the different goals and prioritizations. Many corporations who espouse their commitment to JAIDE prioritize and direct resources toward the diversity pillar, often neglecting inclusion and equity, whether inadvertently or not.

Thus, JAIDE itself is not a neat, discrete concept; it's inherent multiplicity may drive different practices across organizations and cultures. It is also a concept that might not be as resonant for some groups, as illustrated in the responses of the Indigenous people who were interviewed, for whom truth, reconciliation, self-determination, authenticity, and sovereignty held more meaning to their philanthropic and cultural outlook and guiding principles. This multiplicity is even more manifest when we consider that many JAIDE-oriented strategies seek to address biases stemming from whiteness, rather than drawing on the cultures and aspirations of non-white groups.

JAIDE in Training, Staffing, and Accreditation



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Training: Intent Vs. Application and Accountability

A wide variety of perspectives also emerged amongst the diverse respondents around the topic of training, staffing, and accreditation—three separate lines of inquiry but closely related in their articulation. There has been a growing recognition of and push for the need to incorporate JAIDE in recent years across multiple sectors, including government, corporate, and nonprofit. One of the common tactics adopted by organizations has been training. Largely an emerging and unstandardized field, there are numerous differences in how DEI training is designed, conducted, by and for whom, and for what purpose.

One Black CSR practitioner spoke to the seemingly isolated nature of the training that was separate from the day-to-day work and the wider practices of the organization:

There's absolutely training around...But when it comes specifically to how does this show up when you are doing work with communities, we do not have training specific to that...And I think that does everyone a disservice because people who are coming into these roles, we know can be extremely well intentioned, can take all of this training. But unless you're really steeped in the industry, [you] don't always see how that applies to your day to day work. And then how do you

nuance and navigate that to try and dismantle some of those systems that you're a part of? But like, how can you proactively create change in your day to day work?

This was echoed by several diverse respondents who noted the separate nature of DEI training from the business aspect of the corporation. That is, the learnings and takeaways were intended to help inform CSR practices, but not necessarily to steer the entire corporation toward adopting JAIDE organizationally. Black respondents also indicated that training to learn about systemic racism was not a strategic priority company-wide. As one participant noted, “Core business supersedes in terms of priority and while the department offers training, it's very challenging to engage staff for training.”

When asked about anti-discrimination training toward specific groups, such as Muslims, immigrants, and different age groups, all survey respondents indicated that there had been training offered in at least one of the 12 categories. However, more than one-third answered that the training had been broad in scope—the topics covered all groups under a generic umbrella of “visible minorities” or through unconscious bias training.

Additionally, not only was some of the training found to be ill-fitting with the organization's culture and ways of working, several respondents felt that the actual potential of the training was left unrealized as there was little to no follow-up, tracking, or accountability. As one 2SLGBTQI interviewee remarked,

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We can say all these things, but what are we actually doing right? You can sign the BlackNorth pledge. Then we must be accountable as organizations to show growth every year from the previous year, because lord knows the employment equity section of the government is not adequately staffed enough to go out and call people out when their numbers aren't strong. You haven't hired an Indigenous person in ten years, [or] how high is the Blackness in your organization? How are you trying to move people up?

Despite the consensus around the limitations of training in their wider applicability and accountability, one South Asian respondent found it to be a useful vehicle toward enacting broader organizational and behavioural change, starting at the CSR level:

I'm trying to ensure that I'm affecting other parts of the business as well. So it's not just the corporate citizenship strategy because I have always taken an inclusionary lens on that...There's a whole other component that is trying to develop our truth and reconciliation journey. We're looking at a number of pieces that fall under that

very, very big umbrella. But I'm actually trying to take it beyond that strategy, and I'm trying to incorporate it so that it is actually a part of our human resources strategy that is actually a part of our goal-setting strategy. I'm actually trying to infiltrate it right up to the top so that we have conversations and do we make it a pillar or do we make it a value in the company? And what I'm trying to do is: how do I get everybody to put their lens on and incorporate it into their work?

Department Placement and Staffing

The perceived extraneousness of DEI training and its separation from wider organizational mandates mirrored that of the perceived displacement of CSR within a corporation at large. Common responses to the question of where CSR sits within an organization included shifting from department to department, merging with another, or being “rootless”, to being several rungs removed from any kind of senior leadership oversight. As a few CSR practitioners—Black, South Asian, and South Asian-Muslim—explained,

[...] We used to be a part of marketing. And then we moved under our legal group head, and now we've moved under, the team has a new name...I don't know if this is going to be our last move.

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I think there has been debate in the company about where it belongs. Some people feel that some of the work, because they do a fair amount of employee engagement to whether or not that needs to sit under their space. And then, of course, there are those of us who believe that there should be a dotted line right to the CEO.

[...] Some organizations have CSR that reports directly into the CEO and I think that's the right place for it to be if, if you really want to put your money where your mouth is, if there's no executive buy in, there are going to be issues with getting things done, with moving the needle on issues. And that's effectively where D&I need to sit as well.

Compounding challenges associated with the haphazard nature of CSR teams and their role within an organization was the staffing makeup. Our survey found a very particular demographic profile within the CSR community: the majority of community investment practitioners in Canada are white females, between the ages of 35 and 54, and earning over \$100,000 per year. As evidenced in other research on the demographics of corporations⁶ and nonprofit board members⁷, several interviewees, including Asian, Black, and white, attested to the lack of diversity and inclusion on their own CSR teams and within the organization as a whole.

[...] Every day I still encounter situations where I am one of the very few people of colour in the room. And I see an immediate disconnect between my every day and my network compared to what the philanthropic community looks like...I myself would have never imagined myself to be in the role that I am today. But just through life circumstances have been able to come into this privileged spot that I hold.

[...] When I first started...every conference that I went to, I felt like I was maybe one of ten people of colour there visibly...I would joke about it, like I'm going to go hang out with the white women right now because like, that's what these conferences were. I have seen a bit of a shift over the past five years.

Certainly, I think we will see a shift moving forward because of the murder of George Floyd, pushed a lot of these institutions into action of hiring practices and moving, moving diverse talent pools up the pipeline.

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[Lack of diversity on teams]...there's a concerted effort in my team to start rectifying that. The new manager that we've brought in, she's Black and she's very active in minority communities. And that brings a perspective that was definitely lacking in the team and it's something that comes up. I mean, in groups that I sit in where we're having conversations, it's the first thing we have to acknowledge, that we are a group of white women who are talking about this and that we shouldn't be.

[...] At the end of the day, inclusion is the most challenging component of that dialogue, because it speaks at a much deeper level to the overall culture within the organization. They brought in a white woman from [country name omitted] who had spent most of the time between [city names omitted] and had no roots in the local community...This just makes no sense to me. How you can have someone that does not understand the social fabric here from a lived experience, that has no connections with, you know, some of the marginalized

communities or visible minority communities? Like I'm completely confused. And then I also pointed out: If there is no budget associated with this, you actually have no intention of doing anything. Then I also pointed out, this person is reporting to probably about six layers before it even gets up to the CEO...Your intent might be good, but how you're undertaking this provides me with no comfort that it will have an impact.

The potential limitations of this homogeneity notwithstanding, what complicates matters for some diverse CSR practitioners is finding themselves tasked with leading JAIDE initiatives based on their perceived diversity and presumption of “lived experience.” Alternatively, there are those organizations that have endeavoured to diversify their staffing base by creating new EDI positions and/or having more representation at the senior or board levels. The lack of diversity in upper levels of management, while a long-held and accepted practice, appears now to be under close scrutiny and a measure of JAIDE. While efforts to increase representation are lauded, they also come with criticisms that they are just that—representation unfounded on merit or experience and one that doesn't address the systemic issue. The concern surrounding this practice was echoed by Black and South Asian interviewees:

That, too, is happening in workplaces where people think that, well, if I just put someone who looks diverse in a space about diversity,

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then I've done my part as opposed to really understanding whether that person can. Just because they have lived experience doesn't mean they can necessarily roll something out in a company, whether they can actually do that and then put the resources, financial and otherwise behind that person to actually get the work done.

[...] There is now this assumption that if you have lived experience, you can also just excel in this role, right? Like, oh, we want to fund Black communities we are going to hire this Black person. And I'm like, But do they have any experience in the work? Do they understand the nonprofit sector? So we've kind of flipped to the kind of extreme of the optics, and we're still missing that foundational understanding of the expertise required.

We don't need to go out and hire someone specific because it's not as if they need this specific knowledge of a system or they need a specific knowledge of an equation like, oh, it's just community. And so...I think even as we look at the sector on a whole, there's still a lack of full understanding of this. This is the type of work that needs constant training, that needs constant learning, that needs people who have an understanding of justice and equity. I don't think there's a full understanding of the skill sets that are needed in this role. And so it's just kind of filled with whoever has a general interest.

This presents a conundrum of either not having suitable personnel to lead JAIDE-facing CSR or having a tokenistic representation at the expense of applicable experience and qualification. The question is then, who would be best to lead JAIDE? What types of experience—both personal and professional—skills and credentials or certifications are needed to carry out CSR initiatives while also upholding principles of JAIDE? In order to attempt to answer this question, we turn the focus on the types of talents, skills sets, and accreditations that are currently driving CSR initiatives that were found within our survey sample set, particularly among diverse CSR practitioners.

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Practitioner Experience, Education and Accreditation

Collectively, Black survey respondents tended to have fewer years of experience working on corporate community investment teams, compared to their white and Asian counterparts. Fifty percent of white respondents had spent over 11 years working in community investment whereas 75 percent of Black respondents reported less than five years working in community investment. The majority of Asian CSR practitioners had more than six years in the field. This reflects what we perceive to be the outcome of intentional or unintentional bias within corporations in relation to the acceptable profile of CSR practitioners, as a predominantly white, female role. The rarity of long-standing Black and Indigenous CSR practitioners in the CSR world could be the direct result of historical exclusion.

Additionally, 50 percent of white respondents had community investment education or training, while 88 percent of Black respondents reported as having none. Furthermore, amongst the same set, only 25 percent of Black CSR practitioners reported as having funding allocation decision-making responsibility—a marked contrast to 96 percent of white respondents who indicated as having funding allocation decision oversight.

From what was gleaned in the individual interviews, these contrasting figures are hardly surprising. As noted by several interviewees, community investment teams have tended to be racially, ethnically, and culturally homogenous, with interdepartmental transitions—for instance, shifting from a role in marketing or HR to CSR—being a common entryway into the

community investment field. In parallel to findings from our own survey, the predominance of white, middle-age, female CSR practitioners in positions of strategy and decision-making was also noted in a US-based study that was released in the spring of 2022.⁸

The same US-based study also compared racial and gender diversity across three levels—head of CSR, head of division, and CEO. From a racial standpoint, white men and women were more represented by two to six times as much as BIPOC⁹ men and women across the levels; BIPOC women represented 15 percent of head of division compared to 47 percent white women; and BIPOC men represented 7 percent of head of division compared to 31 percent men.

However, looking at the US-based study from a gender perspective, both BIPOC and white women were decreasingly represented as the roles became more senior (from 30 percent, down to 15 percent and to 1 percent — from head of CSR, to head of division and to CEO for BIPOC and white women), while BIPOC men were increasingly represented (from 6 percent, up to 7 percent and 13 percent from head of CSR, to head of division, to CEO for BIPOC men).

These collective findings corroborate previously-held knowledge on the intersection of race and gender in hiring patterns and positions of power, but they don't necessarily explain the disparity in CSR practitioner education and accreditation between white and racialized women.



On the Ground: JAIDE and Social Impact in Practice

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On the Ground: JAIDE and Social Impact in Practice

With some understanding of the influence of JAIDE on internal structures and practices covered in previous sections, it would be helpful to know how these then translate on the ground—ultimately, how JAIDE informs or will inform relationships with nonprofit organizations. Are there JAIDE-focused requirements and expectations desired by corporate community investment? Are there repercussions of JAIDE policies on funding matters, including how the notion of community investment is framed or politicised? How does commitment to JAIDE affect the types of funding models or philanthropic relationships brokered by corporations and nonprofits?

JAIDE Expectations for Nonprofit Partners

A series of questions were posed in our survey of Canada's largest companies to understand the different practices that characterized a corporation's community investment strategies, one of which was on JAIDE as practiced by corporate nonprofit partners. Specifically, did corporations prioritize working with nonprofit partners that espoused diversity and inclusion? Of the respondents, 47 percent indicated their community investment strategy prioritizes supporting nonprofit organizations led by women and Indigenous peoples, while 26 percent indicated that their company's community investment strategy does not prioritize nonprofits led by any of the specified groups listed, including women and Indigenous peoples. However, when asked specifically about measurement and whether they ask about their nonprofit partner's senior executive team's diversity, only 18 percent of survey respondents said this was done. Corporate community investment practitioners appear not to be a driving force for JAIDE practices within the nonprofits

they support. Despite JAIDE training that is widespread within corporations, such training does not translate to corporations discussing or requiring reporting on JAIDE practice from their nonprofit partners.

For others, there was more focus on the diversity of the people served as a result of funding, and not necessarily on how the nonprofits themselves were led from a racial diversity standpoint; however, Indigenous leadership was the lone exception to this position. Additionally, that the corporations themselves were in the initial stages of their EDI strategy was a common refrain:

We do not have one community investment strategy but many: Through one of our foundations, we aim to support initiatives led by community and diverse groups. But we do not specifically prioritize any one group in our strategic priorities except Indigenous peoples.

We are in our infancy with DEI and how established corporate investment can collaborate. The focus is on establishing awareness about general areas of DEI, and establishing a DEI committee.

Interestingly, a 2022 US lead study on US and Canadian donor perceptions toward EDI and influencing factors demonstrated that for 42 percent of Canadian donors, a charity's lack of fair representation of the donor's race, gender, sexual orientation,

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age, disability status, or religion on the organization's board and staff would not affect the donor's choice to support them. Conversely, only 26 percent indicated that they would be less likely to support the charity as a result of this lack of representation.¹⁰

The disinclination amongst CSR practitioners and other philanthropists and grantmakers toward encouraging JAIDE practices from nonprofit partners and seeking evidence of current practice is perhaps one of the most critical factors as to why charity and nonprofit boards across Canada remain almost exclusively white and exclusionary of Black and Indigenous people.¹¹

Another survey question was aimed at understanding corporations' attitudes toward JAIDE-oriented working models, such as participatory grantmaking, trust-based philanthropy, *ubuntu*¹², and braiding¹³. While 31 percent of respondents indicated they had implemented participatory grantmaking and trust-based philanthropy strategies, 25 percent answered that their corporation did not approach community investment with any of the listed approaches in mind. Similarly, some companies selected partners based on their partner's funding model — for example social impact investing (for 37 percent of respondents) and community-centric fundraising (for 31 percent of respondents). However, this was not a factor for nearly one-third (29 percent) of respondents. While several had indicated their support for and implementation of JAIDE-oriented models as part of their own programs or programs of their nonprofit partners in the survey, in our interviews, interviewees were unable to provide clear examples of the steps they had taken to implement alternative approaches, such as community-centric decision-making.

From Decolonization to Breaking Down CSR's Biggest Barriers

In all the individual interviews and in our survey of large Canadian companies, there was support for dialogues, policies, and practices to further the aims of JAIDE. For instance, over 50 percent of survey respondents agreed that support to understand systemic anti-Black and anti-Indigenous racism is a strategic company priority; 65 percent implement benchmarking for the hiring and promotion of women; 53 percent include similar benchmarking for Indigenous people; 65 percent have metrics to track diversity among their executive teams. Additionally, 73 percent of respondents indicated they would support decolonizing¹⁴ their company's wealth given the opportunity.

Following this train of thought, individual interviewees were asked to share their perspectives on decolonizing wealth. As demonstrated in the questions related to the principles of JAIDE itself, diverse as well as white respondents offered a number of different perspectives on what decolonization entailed and the factors involved in trying to enact it. CSR practitioners who identify as South Asian-Muslim, and Black, when asked what decolonization of wealth meant to them, remarked:

That's a tough one because I think decolonization it's a big term and there's so many things to address. There's decolonization of wealth, but then there's also decolonization of the minds. When I think of decolonization of wealth, it's about more equitable distribution of

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wealth and more in terms of how, and not just wealth from a money point of view. It's also from an opportunity point of view. How are we making sure that we understand, and I think this goes back to what I said previously around Indigenous communities a lot when we're thinking about decolonization, we can't really do it without understanding the history because history defines the current context and we can't decolonize wealth or opportunities without understanding why certain communities are in the position they're in. And I think ... that would be the first step of breaking down some of those barriers.

[Decolonization in the reparative sense] I would then say I have always been a big supporter of why we're not doing more for the First Nations community. Why? Why is it that in a land that has so much water, we can't get fresh water to the First Nations community in northern Alberta or even here in northern Ontario? That's crazy.

For 2SLGBTQI, non-binary, Black, Indigenous, Indigenous gay, and Asian CSR practitioners, decolonization is inherently tied to reparation and giving up control:

I think about decolonization, reparations and giving land back. That's ultimately what has to happen. Yet have we given land back? No, we have not. And even suggesting that to corporations -- that small donations of land could be handed back -- is a no-go zone, even for multi-billion dollar companies who regularly champion their commitment to Reconciliation.

You cannot decolonize philanthropy and the structure that it exists now, because it exists as the haves, the have nots and a power structure where one group is looking for, kind of the crumbs from another group. [Paraphrasing a book] Philanthropy is about giving the leaves of a tree, but it's not about giving the roots. So we have that kind of structure and then you layer in the idea of diverse communities. Which we know for all of the systemic reasons, are often ones that are being serviced or need to leverage the services of nonprofit sectors. And so you kind of reinforce this narrative of, not just the haves and the have nots, but the have nots look like me and you. And so when we talk about

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decolonization of wealth...we tend to think of these EDI conversations. When I go and enter these EDI conversations, it's always people of colour around the table and Indigenous people around the table. But I'm like, it's the white people who have to participate in this. We cannot solve decolonization, and we cannot be decolonized from just our seats. It has to be participatory and [with] those who are in positions of power within the system and I really don't see a lot of authentic appetite for that because it's basically like saying I should give up my seat or I should give up my money. People are not socialized to give up anything, and that's what it's seen as.

I'm grateful for Edgar Villanueva for coining the decolonization of wealth. My focus is not on that term. So I'm going to come at it to you with a little bit of a different perspective. Utilizing money as medicine is a concept that just is far more aligned with our values and our way of knowing and being and existing in this world. I understand the need for the

thought process of decolonizing wealth, but [in this individual's Indigenous community investment space] we don't decolonize anything. Because it's all Indigenous run. We apply our ways of knowing and being within the philanthropic sector.

It's traditional. I'm giving you a gift or I'm giving you a bundle. And a bundle can be medicine, it can be taken in any shape or form. But our focus is on the brilliance and ingenuity and the answers that community has and what is going to serve you best. So we're a bunch of gardeners in Haudenosaunee culture or farmers...What I'm inviting in is, we would like to seed the richest soil for your community and there just so happens to be a transaction attached to it. So the focus isn't the colonizing. The focus is not on the money.

The journey of decolonizing is about understanding what you have given up or lost. In many cases giving up something that you didn't know you gave up or lost because

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it happened generations before you. My parents and my grandparents never wanted to admit that they were Indigenous. I'm the first generation of my family to take an interest in our Indigenous culture and reconnect. In learning about my culture I come to a place where I have to unlearn and to realize that I come from a very rich culture of different views than that of western views. One example that I can illustrate and share is that I am two-spirit from my Indigenous cultural point of view. I'm gay from a western point of view. As I grew up, the western society around me taught me that being gay was wrong. But if I had been raised with the Indigenous teaching and background, I would have learnt that from an Indigenous viewpoint, being two-spirit is something beautiful that I am gifted, and nothing to be ashamed of. And so, when someone says 'decolonizing', my mind goes to, okay, what else is it that I need to unlearn? Because there still is more that I need to unlearn, even as an Indigenous person. So I tend to use a positive point of reference of what I'm trying

to accomplish, not from a deficit negative point of view. So when someone says 'Decolonize', it's used often in a negative tone. And I would rather understand about, how can we today, fully ensure that Indigenous people can fully participate in the Canadian economy? When I think about that, from that point of view of what are we trying to achieve in terms of decolonizing wealth, I really look at it as, how do we ensure that Indigenous people can fully participate and connect to who we are as a culture and a community. [...] Now I understand, though, that there are some great wrongs that need to be corrected. I'm not an expert on that, in terms of the treaties and everything, there's other people who can speak far much more eloquently to that than I can. But I do believe that what we're really talking about, though, is giving self-determination to Indigenous people.

We would never use terms like colonization in a corporation. It just wouldn't fly. But that doesn't mean that we don't have conversations about [whiteness] in this particular industry.

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There's an issue with the fact that it has a long tradition in the history that for many people feels outdated and is historically very white. And there's this need to diversify, because if you want to look at the longevity of the company and its future and you don't do that, then where is the company going to go?

Others, including an Indigenous gay person and a South Asian-Muslim, reflected on the mechanics and limitations on a wider organizational and systemic level:

I can tell you what I think the process should be, but I don't know what the outcome would be. But the process is that they have hired Indigenous people to develop a consultation process with Indigenous people to determine what should be the outcome and the direction that the banks are going to achieve that. So to me, it's more about the consultation process you created to arrive at your decision on what to do.

Well, I would expect that the banks would ensure that. For example, a market like Winnipeg, 18% of their loans go to Indigenous people because 18% of the population is Indigenous. I don't think that, that's not the type of prescriptive, that's not the type of outcome that's needed. It's a consultation process that the banks need to go on, in order to determine what their actions and outcomes should be.

I think it starts with more representation. People with lived experience, people who have belonged to these communities, being in those roles, making those decisions and sharing their experiences. I think the challenge is that people who have, who don't know the day to day realities and experiences of some of these communities are making decisions for them or on their behalf. And I think representation matters in this case because unless we hear directly from these communities, we're not going to see change. It will continue. I guess that disparity will continue in this profession.

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I think it definitely needs to change at the executive level. It has to be built into strategic priorities of the organization. So there's accountability and that's one way to bring about change, because what's that saying? What gets measured gets managed. So, unless you put it down as almost like a goal that you're going to be held accountable for... Like people say they want more diversity. But on paper, in practice, we see that's not the case and that hasn't been the case for a long time now. So I think definitely executive levels, board of director levels, that's where these conversations need to happen. And there needs to be more accountability.

There is an opportunity for the West to learn the Indigenous point of view of culture and structure. And that point of view is that we are whole and complete humans, that we are all connected, that not only are we connected in a human family within the medicine circle, which is one of our teachings, but that we are also connected to the animals, the birds, the

fish, the four legged ones are our relatives, that the trees and the rocks are also our relatives. And our viewpoint of what it means to be alive in this universe, on this Mother Earth at this time, is about understanding that we are all connected. And so in that journey of understanding and inviting in the Indigenous point of view, I believe that we all have something great to benefit from, that in order to make that leap, it is going from the mind into the heart and being connected. And so when we talk about that interconnectivity, when people are in their titles or in their jobs. They are also mothers and fathers and sisters and brothers and grandmothers and grandfathers. And the question I have for them is, so when you make decisions, do you stop being a parent because you're the manager of X at a company? Or is it time to integrate and understand that you cannot make a decision from a company point of view and stop being a grandmother, a grandfather, a mother, a brother, a sister. And we have to start to think collectively beyond our

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titles and understand that we are much more, much, much more. And that's where we talk about the heart, right? I think when you talk about decolonizing, it's about seeing a new world view open to Indigenous wisdom of being all connected.

As several interviewees noted above, decolonization is about more than reparation. It is about dismantling systemic oppression and barriers to achieving JAIDE on individual and societal levels. While there were various interpretations of how the decolonization of wealth could be implemented, implicit in the discussion was examining the barriers to JAIDE and community investment as a practice. These include the framing of community investment within a corporation as a viable and tangible output—worthy of the same type consideration as any other arm of the core business and full incorporation within the organization at large. A South Asian CSR practitioner noted,

I think it's a combination of attitude and misinformation. But I think people are beginning more and more to understand that when you incorporate things that fall under corporate citizenship into your business and you, your employees are happier and they become more productive and you have less sick days...

We've had surveys in our company. At one point we used to fall into the great places to work survey that we would do. And for years in a row, number one thing is it was the community stuff that really had people happy and kept them going. And yet that didn't necessarily translate into more dollars going into and more resources going into that space.

It needs to diversify for sure in terms of who's doing the work, but not just in this work, because the influence really needs to be across organizations and diversity in general. If it's not reporting to the CEO or the COO there, it needs to sit in a space in the company that doesn't silo it in a way where people figure that that's just not my area of responsibility... So I think positioning is a big one in terms of its future, and then it's really going to have to define itself more. It is a huge, huge umbrella of work. And how does it begin to continue to define and redefine itself and carve itself and make sense for companies in the work that they're doing?

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An organization's amplified investment in CSR would then facilitate more in-depth and relevant training and onboarding of staff, as well as knowledge-sharing. As a Black CSR practitioner explained,

I am interested in, really, setting up practices within enterprises that really help people working in this space, have a better understanding of the space, and particularly around the lens of equity. It's something that I'm really passionate about and so I've had conversations, we're having strategic planning right now for next year. And one of the priorities I want to put in there is, how are we equipping our team and our broader team. When we're onboarding, what's part of the onboarding process? Where is there training about how we do this work? And what are some best practices and how do we keep that training ongoing?

The push for reexamining and boosting community investment within an organization will also have repercussions on the talent pipeline: the training and education of future CSR practitioners and the diverse perspectives that they will bring. As white and Black interviewees proposed,

And I feel like there definitely needs to be greater emphasis on fresh voices to these conversations in whatever way that looks. And that might mean just restructuring things a little bit. I think that the next generation is hopefully one that's not just women, or white, that are sitting around the table... If we're going to really be having value in systems conversations, then it has to go beyond the money and the like. 'How many employees volunteered this month?' or those kinds of metrics. Because metrics shift for CSR, but companies don't like that because they're used to panels and they like knowing what they know. And so you get stuck with these antiquated models of metrics for CSR pieces that don't actually correspond with things that you would want to do to develop JAIDE or to develop other areas. And so I think allowing for some flexibility in the evolution of metrics, it doesn't necessarily have to be year to year. It depends on the project, it depends on what you're looking at, what's relevant, what helps us advance the narrative and what actually contributed to systems change.

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I think a lot of people, myself included, we fall into this role accidentally. We come from HR or we come from marketing, we come from a different place, and then we end up in community work and in community investment work. I personally would love to raise the profile of this as a career, as a profession, as a start, so that we're starting young. Everybody on my team, they're all sustainability experts. That's how they started or they've been working with the organization. They just kind of found their way here. How can we do something that is training up young people from a very young age to be here, because we also need the youth voices. They're just not here. We can't find them because they're not working in the space, because it's not a career path that's clear to them when they're starting out.

I think there needs to be more incorporation. Right up into the senior ranks. So, you know, every once in a while you get the impression that some of this work is undertaken as a secondary thought. But, I think for the companies that

do it well, it's designed into the fabric of the organization. And when I say that, what I'm referencing is that, you see younger people having a greater desire to have [an] impact. While most of them will want the money, a lot of them also want something a bit more. They want a sense of purpose. Okay. So if that's the case, then I think smart leadership will recognize that if you have a workforce that enjoys coming in, feels they are working for an organization that is delivering to not only its stakeholders, but also more widely, the community. I think that goes an awfully long way to building not only purpose, but culture. And I think those things, you know, they, not as tangible, but it creates impact.

Lastly, a key barrier in advancing social impact that was noted by one seasoned Black CSR practitioner was not being taken seriously by the company, which appears to spur into JAIDE actions (beyond the provision of training) only when popular media pushes them to do so. This deep-rooted barrier speaks to the need to think ahead and prioritize the voices of Black, Indigenous, 2SLGBTQI, other marginalized people, particularly as they may have come from or are connected to the very communities that need support. Additionally, this type of

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dismissal and alienation only lends to the feeling of being ignored and untrusted in the workplace until their ideas are validated by the media or their white colleagues:

My takeaway has always been that we, as Black people, have been sort of like on the, on the margins on the periphery, sort of not quite in the eyeline. I think the substantial change that has occurred has been a direct reflection of what's taken place in the last two years [the murder of George Floyd and the onset of the COVID-19 pandemic]. So if I was to use my lived experience, having worked here for over a decade, I've been doing an undertaking within the community for much longer than that. And literally, it's only in the last 2 to 3 years that the organization has started to recognize, and I gave up trying to, in all honesty, a number of years ago I gave up trying to get them to support me. I said 'Fuck it, I'm just going to go and do what it is I need to do' that I know I need to do and make it as simple as that.

And so it's actually quite amusing that in the last couple of years, especially as I've actually received acknowledgement from outside bodies, you know, I hear people coming to ask me, 'Oh, why didn't you tell us about it?' [and] 'I would have loved to support you.' It's like, stop your horseshit. You weren't there providing the support when it was needed. But I am very pleased that now you're saying so. So I'm going to hold you to that. So what I've been able to get my organization to undertake in terms of opening up their eyes in the last two years and the impact and the support received has been extraordinary. So I would say more has been done here internally within the last 18 months to two years than I would have seen with the, let's say, the previous 15 years combined. And again, this is just, understand this is perspective that's about my lived experience rather than a complete reflection of the reality where the [company] is concerned now.

What's Next for CSR?



What's Next for CSR?

The desire to see corporate social responsibility undergo radical transformation is shared by many CSR practitioners, including those of diverse cultural backgrounds, sexuality, positions, and perspectives. Regardless of the differences that separate the professionals surveyed and interviewed, the throughline is that they, in their various capacities, desire meaningful, sustainable, and equitable social change in the way CSR is conventionally practised.

Despite this commonality, the diversity of perspectives presented here point to fundamental fissures and oversights that run counter to the objectives of JAIDE and inhibit its progress and application beyond investments in training. The experiences and viewpoints shared by CSR practitioners, particularly those of Black, Indigenous, South Asian, South Asian-Muslim, and 2SLGBTQI, demonstrate that these barriers need to be systemically and meaningfully addressed if JAIDE is to be truly, fully, and authentically realized.

This is not to discount the admirable efforts taken by many companies and practitioners to bring about JAIDE-oriented change. Yes, training is important. Yes, changes to hiring practices are crucial and long overdue. Yes, a collective promise to anti-racist and anti-oppression practices and to supporting unfunded and underfunded nonprofits is necessary. What we propose is to ensure that JAIDE positions and policies are in true alignment with JAIDE actions and practices in such a way that measurable change actually occurs. The global events of the past two years have been instrumental in inspiring a CSR shift and in many ways the work is just beginning. We hope that this study sparks self-reflection, questioning, learning, and meaningful dialogue, and suggests a few steps that may help the process.

Recommendations



Recommendations

1. Hold a mirror up to your company, department, and personal viewpoints, and appreciate what is authentic and real, versus aspirational. Confront your past failings and limitations, and set in place solutions that tangibly improve CSR practice and understanding within your organization.

Confront your past with openness and honesty, appreciating that holding up a mirror can provide a helpful path forward. Corporations are, first and foremost, corporations. That they support social causes and champion JAIDE is important, but this doesn't discount their primary societal function as a business, which is also important. Being transparent about a company's role and function, while also demonstrating commitment to JAIDE, would avoid the pitfalls of seeming hypocritical in the social impact space.

2. Understand and articulate the kind of JAIDE you wish to see in your own corporate community investment practice and within your company.

JAIDE means different things to different people. For some people, JAIDE is not enough or even culturally relevant. JAIDE is complex and to treat it as an umbrella term would be discounting the myriad diversities and challenges involved in JAIDE practices and not giving them their proper due. To fully understand what JAIDE means for your organization requires understanding the perspectives of the people most affected by anti-JAIDE practices, such as Black, Indigenous, 2SLGBTQI, South Asian, South Asian-Muslim, youth, and those facing various types of marginalization or discrimination, within your own and partnering organizations.

3. Set higher expectations for training. Understand the learning gaps, needs, and styles of your organization. Promote training that is relevant and engaging across the organization, and that is continuously accounted for and assessed in terms of positive actions after training is undertaken.

Training, when done well, holds much potential for individual and organizational change. It is not a one-off checkbox item. Like all effective learning, it requires new practices. Such practices must be linked to respectful relationships, listening, continuity, and responsibility. No two trainings are alike; it must be undertaken by trusted practitioners with valid experience and expertise, who understand the specific needs of your organization, and can help you outline critical priorities and actions.

Recommendations

4. Expect the same standard of JAIDE practices from your nonprofits, vendors, stakeholders, and partners, as espoused within your own company, and be prepared to put in real investment and take risks as you pursue change.

However JAIDE may be defined within your company, it must be a systemic practice and not something that's confined to one department or one sector of society. Asking for the same kind of standard of JAIDE from other departments, vendors, and nonprofit partners would enable wider social change. Like corporations, nonprofits face similar JAIDE-related challenges and are also in need of radical transformation. This is not to put undue pressure on organizations; rather, inviting partners to engage in dialogue, adopt JAIDE practices, and to join you in this social change movement. Additionally, recognize that JAIDE work is hard and meaningful work in and of itself that requires a real investment of time, money, thought, and action to ensure optimum resources and expertise.

5. Recognize that diverse communities have been told for many years that change takes time. Have a plan to ensure meeting objectives, continuous progress, tracking, and accountability of JAIDE and CSR practices are prioritized.

It is easy to assign large-scale change to the function of time. While this holds true to some degree, it is important to continuously build and work toward change, and to chart this on a plan. Whatever the scale of the plan may be, there needs to be clearly defined objectives, desired outcomes, roles, resources, measurements, and timelines in order to successfully implement across companies. This infrastructure would accelerate organizational maturity and change and avoid stagnation and loss of interest or focus on CSR internally and externally.



***Part Two of
this Series:
Youth Discussions
on Equity in CSR***

Part Two of this Series: Youth Discussions on Equity in CSR

One field of inquiry that might shed some additional light on the practice of JAIDE in CSR is the various entry points into the corporate community investment position.

We ask ourselves: *Do community investment professionals tend to be internal or external candidates for their roles or whether they held positions in different departments that then warranted additional training as part of this new move? Are racialized women more likely to apply for and enter the corporate community investment practitioner space through a different channel, such as community or nonprofit work that puts more emphasis on relevant, on-the-ground experience than institutional accreditation?*

While these questions, in addition to understanding how talent acquisition and professional mobility for specific demographics

are being impacted by an organization's adoption of JAIDE practices, are beyond the scope of this study, it would be worthwhile to explore them in future studies.

What we are currently equipped with, however, are youth insights that help to contextualize training and corporate community investment positions in the present and to project into the future. The findings from a youth focus group conducted as part of this study warrant a dedicated spotlight, and as such, the second report of this two-part series focuses on the voices of young people who are about to enter the corporate community investment profession.

Read the second report

*From the Mind to the Heart:
Youth Perspectives & Recommendations on Equity in Corporate Citizenship*

[Read here](#)

References

- 1 The different connotations and usage of the terms notwithstanding, “CSR” is used interchangeably with corporate citizenship and “community investment” in this discussion. Key to our interpretation is the specific emphasis on social responsibility as it relates to financial donations made from a corporation in support of charities and nonprofit organizations. Similarly, “JAIDE” is used in the same way as “JEDI”, “DE&I”, “IDEA”, “EDI” or “D&I”. This interchangeability reflects the different usage of the terms by respondents.
- 2 See above note on various terminology.
- 3 Forty-one CSR professionals from large Canadian companies responded to our survey (33 complete responses and 8 partial); 11 Canadian corporate CSR professionals were interviewed; 5 Canadian university students participated in the focus group session.
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- 12 Ubuntu is an African philosophy and Zulu term that places emphasis on 'being self through others'. Ubuntu refers to acting in ways that benefit the community over personal (corporate) gain.
- 13 Braiding is an Indigenous practice of co-creating solutions based on a mix of diverse perspectives and methodologies. In Braiding, differences are not in competition or erased, they are accepted. Furthermore, historical and systemic violence are acknowledged, and uncertainties, conflicts, paradoxes and contradictions are appreciated for the purpose of true collaboration (Robin Wall Kaimmerer. 2013. *Braiding Sweetgrass*. Milkweed Editions).
- 14 Decolonization of wealth refers to disrupting the existing systems of moving and controlling capital through education, radical reparative giving, and narrative change while establishing just, inclusive, accepting, diverse and equal systems.

Credits

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[From the Mind to the Heart: Advancing Equity In Corporate Social Investment](#)

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This report is also available in French: [De la prise de conscience à l'action : Favoriser l'équité dans le domaine de l'investissement communautaire des entreprises](#) ISBN 978-1-55401-432-3.

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