Extend-A-Family Waterloo Region

INCLUSIVE DOCUMENT DEVELOPMENT AND REVIEW CHECKLIST

Purpose

The purpose of this Inclusive Document Development and Review Checklist is to support Extend-A-Family Waterloo Region (EAFWR) in creating, reviewing, and maintaining documents that are grounded in equity, inclusion, and accessibility. This checklist provides a shared framework to help ensure that organizational documents reflect EAFWR values of Belonging, Community, Equity, and Relationships, while promoting clear communication, justice, and accountability.

The checklist is intended to:

- Embed equity-centred thinking into document development and review processes
- Support safe accountability mechanisms by clearly identifying potential barriers, biases, and unintended impacts
- Improve access to information, plain language, and inclusive, accessible communication
- Promote consistency and alignment across organisational materials
- Support staff in applying an equity lens in day-to-day document and policy work

Scope

This checklist applies to **all Extend-A-Family Waterloo Region documents**, both internal and external. This includes, but is not limited to:

- Policies and procedures
- Forms and templates
- Program materials and information sheets
- Website and digital content
- Communications and promotional materials

All new documents, as well as existing documents undergoing review or revision, must be assessed using this checklist to ensure alignment with EAFWR's commitment to equity, accessibility, and inclusion.

Instructions for Using This Guide

The framework itself is built on three key pillars:

1. **Equity-Centred Intent**, which ensures documents reflect equitable values and clearly communicate their goals .
2. **Inclusive & Accessible Communication**, which promotes simple, culturally respectful, and inclusive language that is accessible to diverse audiences.

3. **Equity Impact Assessment**, which reviews documents to identify and address inequities or biases they may unintentionally reinforce, ensuring fairness in both design and impact.

Together, these elements provide a clear pathway to creating documents that are equitable, inclusive, and sustainable in practice. At any point, if additional guidance is needed beyond available resources, staff are encouraged to connect with the Equity Strategist for support.

The Checklist

1. Equity-Centred Intent

Equity-Centred Intent *focuses on ensuring that policies reflect equitable values and clearly articulate their goals. This pillar emphasises the importance of recognising historical events and past policies that have shaped current realities, understanding societal structures and norms that may affect different groups, and identifying barriers or disadvantages that could influence outcomes. By centering these considerations, policies are designed to be fair, inclusive, and responsive to the needs of all impacted individuals.*

- ☐ **Clearly articulated goals** – Does the document clearly state its objectives in plain language and states what it is designed to do?
- ☐ **Identifies potential barriers or disadvantages** – Does the document unintentionally create obstacles?
  Example: a document that assumes internet access, specific literacy levels, or familiarity with cultural references may unintentionally exclude people with disabilities, newcomers, or individuals facing economic barriers.
- ☐ **Fulfills a clear need** – There is a demonstrable gap or requirement that the document addresses.
- ☐ **Audience clarity** – The intended audience can easily see themselves reflected.

2. Inclusive & Accessible Communication

Inclusive & Accessible Communication *ensures that documents are written in clear, simple, and culturally respectful language that can be understood by a diverse audience. This pillar emphasizes using wording that affirms inclusion, avoids bias or stereotypes, and clearly states intended outcomes. By prioritizing accessibility and clarity, policies become more understandable, actionable, and welcoming for all individuals impacted*.

- ☐ **Plain language** – Is the wording simple, clear, and free of jargon or technical terms?
- ☐ **Culturally respectful language** – Does the language honour diverse cultures, identities, and experiences?
- ☐ **Gender-inclusive language** – Are gender-neutral terms used where appropriate?
  Example: Use “they/them” or “staff” instead of “he/she”.

- ☐ **Avoids stereotypes** – Does the language steer clear of assumptions about groups based on identity, role, or background?
  Example: Avoid statements like “women are naturally better caregivers.”

- ☐ **Inclusive examples and scenarios** – Are examples representative of diverse groups?
  Example: Include scenarios that reflect different ages, cultural backgrounds, abilities, and family structures.

- ☐ **Readable formatting** – Is the content visually accessible and easy to navigate?
  Example: Use headings, bullet points, and adequate spacing for clarity using our standard policy template.

- ☐ **Sensitive terminology** – Are potentially triggering or marginalizing words avoided?
  Example: Use “people with lived experience of disability” instead of “the disabled.”

- ☐ **Consistent use of inclusive terms** – Are terms used consistently throughout the document?
  Example: Always use “staff member” instead of alternating with “employee” or “team member” in ways that could confuse.

- ☐ **Acronyms defined** – With the first use of any acronym, is the definition in brackets and the acronym used consistently there after?
  Example: “The Ministry of Children, Community and Social Services (MCCSS)”

- ☐ **Audience awareness** – Is the language appropriate for all intended readers, considering literacy levels, language proficiency, and cultural context?
  Example: Avoid idioms or references that may not be universally understood so it is appropriate for the readers’ needs and context.

3. Equity Impact Assessment

Equity Impact Assessment *focuses on evaluating documents to ensure they do not unintentionally reinforce inequities or biases. This pillar emphasizes assessing whether a document creates unnecessary burdens for the groups it is intended to serve and ensures that it does not prioritise the convenience of document owners over those impacted. Conducting thorough bias checks helps create fair, equitable, and accountable documents that serve all individuals effectively*.

- ☐ **Identify assumptions** – Does the document make assumptions about any group’s abilities, behaviours, or needs?
  Example: Assuming all staff can attend in-person training sessions without accommodations.

- ☐ **Check language for bias** – Does the wording avoid stereotypes, stigmatizing terms, or exclusionary phrasing?
  Example: Avoid phrases like “the disabled” or “at-risk youth.”
- ☐ **Review eligibility criteria** – Could the criteria unintentionally exclude certain groups?
  Example: A policy requiring full-time employment may disadvantage part-time staff disproportionately.
- ☐ **Assess procedural fairness** – Are processes applied consistently across all groups?
  Example: Ensure grievance processes do not favour managers over reports.
- ☐ **Examine power dynamics** – Does a policy shift advantages to those already in power?
  Example: Approval processes that require multiple managerial endorsements may privilege senior staff.
- ☐ **Evaluate impact on equity-deserving groups** – Could the document disproportionately burden or exclude certain populations?
  Example: Check if a policy unintentionally disadvantages racially diverse staff members.
- ☐ **Solicit diverse perspectives** – Have stakeholders from affected groups reviewed the document for potential bias?
  Example: Engage staff from different departments, identities, or lived experiences in review.
- ☐ **Plan for mitigation** – Are there steps to address any biases or inequities identified?
  Example: Adjust criteria, provide additional supports, or create alternate pathways to access benefits.

This concludes the overview of the document framework and its three pillars. By applying these principles, documents can be developed and reviewed with a focus on fairness, inclusion, and equity.

Responsibilities

Responsibility for implementing and upholding this checklist is shared across the organization, with specific roles outlined below:

- **Policy Owners and Those Responsible for Policy Review**
  Responsible for applying this checklist during the development, revision, and review of policies and related documents to ensure alignment with equity, inclusion, and accessibility principles.
- **Human Resources (HR)**
  Responsible for ensuring that HR-related policies, procedures, forms, and communications are reviewed using this checklist and reflect equitable and inclusive practices.

- **Equity Strategist**
  Responsible for maintaining and updating this checklist as needed, providing guidance and support to staff, and ensuring the tool remains current, relevant, and aligned with organizational priorities and best practices.
- **All Staff, Including Program Teams and Communications**
  Share responsibility for ensuring that all internal and external materials, including program documents, public-facing resources, and communications are aligned with the principles outlined in this checklist.

Questions

If you have any questions or need further guidance, please reach out to the Equity Strategist.

Related Policies:

- Equity and Inclusion Policy
- HR Policy Review
- Media and Communications Policy

Approving authority: Leadership Group
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