CHRC
Cultural
Human Resources
Council

CRHSC
Conseil
des ressources humaines
du secteur culturel

HR MANAGEMENT TOOLKIT

BELONGING

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Accessibility Considerations in the Arts

-Nathan Hauch

Accessibility Considerations in the Arts

Accessibility is a **process** of **removing barriers** to **inclusion** and **participation.** In Canada, civil society has made tremendous strides to ensure the inclusion of people with disabilities through legislation such as the Accessible Canada Act, 2019 and the Accessibility for Ontarians with Disabilities Act, 2005, among others. While instrumental for establishing standards - or criteria - in many areas of daily life, there is much more the arts community can do to ensure that people with disabilities are able to **participate** as the **whole**, **diverse people** they are.

These considerations are not exhaustive; as attitudes, processes, and technologies evolve, so do approaches. For the best solution in a specific situation, **consult the experts:** people with disabilities themselves.

Consider Intersectionality

Intersectionality recognizes the diversity of human experience. While people may have one disability, they may have more than one, and they may be part of other equity-deserving groups. There is also a wide diversity of disabilities, be they visible or nonvisible, permanent or temporary.

Recognizing this diversity ensures that service providers consider the broader spectrum of accessibility needs. While people with disabilities may face discrimination, other considerations, such as gender, age, socio-economic status also need to be considered. This means rather than saying, “People with disabilities, and minority groups do not come to events,” ask:

- What can we do to ensure that **everyone feels included?**
- How can we **remove barriers?**
- What **relationships are we building** with different communities to foster **respect and trust?**

Before You Begin

Integrating accessibility is not foolproof, but **advance planning** increases the likelihood of success. Some tips:

Build relationships

For many people with disabilities, ensuring accessibility in advance - from arranging transportation, to ensuring participation once they have arrived at an event - can be **emotionally and mentally exhausting.**

Consider reaching out to disability service groups in your community, explain who you are, that you want to ensure people with disabilities can participate, and **invite their feedback.** If you wish to have people with disabilities provide advice on the accessibility of services, events or products, it is best practice to **pay fair compensation** as recognition for services rendered.

Review policies, procedures and practices

The slogan of the disability rights movement is "**Nothing about us without us!**"

By regularly reviewing an organization's "ways of doing" with an accessibility lens, **barriers may better be identified and removed.**

Create an **accessibility policy** that outlines:

- The organization's commitment to accessibility
- How people may request accommodations
- How to register complaints, compliments and feedback

Plan for accessibility from the start

Accessibility touches every facet of the human experience, and it is not possible to anticipate every need.

- **Ask that people identify accessibility needs in advance.** State, "Accommodations may be requested in advance" and provide contact information. If an accessibility-related need or request is not clear, **be sure to follow up.**
- **Set aside designated funding** to assist with sign language, transportation and other costs.

- **Consider no/reduced cost tickets.** People with disabilities face higher levels of poverty than the general population. Consider the stipulation that, "No one will be turned away for lack of funds" or "Pay What You Can" on promotions.
- **Offer accessible formats, communication supports and other accommodations at the outset.** Particularly for large public events, consider offering real-time captioning, sign-language interpretation and the like.
- **Offer events during "core" hours.** Events after 10 AM and before 8 PM allow more people to participate, such as those that require attendant services, accessible transportation and more.
- **Invite - and respond - to feedback.** As part of building trust and to improve over time, respond to feedback in a timely manner. Where the organization has fallen short, acknowledge this, and outline steps your organization will take to improve in the future.

Collaborate to Find Solutions

Recognize that people may not make their accommodation needs known in advance. In such instances, it may not be possible to provide a preferred support, such as sign-language interpretation for a person who is Deaf or hard of hearing. In such instances, ask the person to **suggest alternatives that work for them**, such as seating at the front, someone to take notes, providing debrief opportunities, and the like.

Consider Language

By using the right language, we signal that we are inclusive and open. Some tips:

- **Use person-first language**, such as, "A person who uses a wheelchair" instead of "wheelchair-bound" and consider how people with disabilities are portrayed
- **Always speak to a person with a disability**, not a support person or attendant.
- **Refrain from using disempowering language** such as "victim"

Provide Accessible Materials

Whether promoting artists or events, or simply facilitating connections online, here are some tips for enhancing accessibility:

Print and Web

- **Provide proper heading structure for websites and documents.** This allows those who use screen readers such as NVDA to jump ahead to relevant sections.
- **Use alternative text for images.** This allows people who use screen readers to understand what certain images mean.
- **Use sans-serif fonts.** This allows those with visual and learning disabilities to better distinguish characters; examples are Arial, Helvetica and Calibri.
- **Use colour contrast.** Ensure that text has appropriate size and relief against background for webpages and images.

Audio and Video

Accessible websites adhere to **Web Content Accessibility Guidelines:**

- **Offer transcripts of audio**, such as lyrics to songs or readings of poems.
- **Offer descriptive video,** which speaks important visual cues.
- **Offer captioning on videos.**

In Person Events

As above, accessibility at events requires planning, promotion and feedback from people with disabilities.

- **Regardless of the venue, ensure organizers are aware of evacuation protocols in the event of an emergency.** Consider appointing a staff person to guide/assist persons with disabilities if need be.
- **Have an accessibility lead on site.** This person can troubleshoot accessibility-related issues as they come up.
- **Have appropriate signage** indicating room location, registration, quiet locations, and more.

While the tips below are disability-specific, they are useful for addressing more than one disability:

Mobility Disabilities

- Locate events near **public transportation** and paratransit **pick-up/drop-off points**.
- Ensure that **doors are opened**.
- Ensure **paths are clear**.
- Ensure that there is **seating provided at the front** and **throughout a venue**.
- Ensure that **events are on the first floor** or that **elevators are operational**.
- Ensure **accessible washrooms** are available.
- Enable people to **reach for materials** from a seated position.

Auditory Disabilities

- Offer to **write down** responses to questions.
- Offer to **communicate via text**.
- Offer **real-time captioning**, called Communication Access Real-Time Translation.
- Use a Closed captioning service that people can activate if needed. Example on Zoom: https://support.zoom.us/hc/en-us/articles/8158738379917.
- Offer **sign language** in American Sign Language (ASL - English) and Langue des signesquébécoise (LSQ - French). Be sure to provide interpreters with meeting agendas and other requested information in advance. If the event has a social component, confirm with the person with a disability if they would like to have the interpreter present to facilitate participation.
- Offer **assistive devices** such as audio loops.
- For readings and plays**, provide printed copies** of materials at the event and/or offer to **email them to participants directly**.
- For music events, consider **using lights to indicate cadence** such as through AudioLux.

Vision Disabilities

- Have **adjustable lighting** available.
- Provide **water bowls for service animals,** and understand that service animals do not have to be guide dogs for people who are visually impaired.
- Consider having written materials available in **Braille**.
- **Email accessible documents** for readings and events.
- Offer **descriptive audio of videos and live performance**s through closed audio loops.

Learning and Developmental Disabilities

- **Use easy to understand words.** Refrain from using jargon and acronyms.
- **Break information down.** Use shorter sentences and focus on key points.
- **Repeat back what was heard.** This helps reduce misunderstandings.

Non-Visible Disabilities (Environmental Sensitivities, Mental Health)

- On promotional materials, consider asking participants to **refrain from using scented products.**
- **Offer a "quiet location" with a place to rest.** This can include a chair or a bed, and a jug of water and cups.

Virtual Events

Just as with in-person events, virtual events require advance planning and dedicated accessibility resources and supports. Some additional considerations:

- **Research platforms** for virtual events such as Zoom.
- **Do a test-run** of accessibility features before the event.
- Have a **designated lead in the chat** to address accessibility-related concerns.
- If holding a conference call, **ask each person to identify themselves** before speaking.

Resources

Arts Organizations

- Canada Council for the Arts, Deaf and Disability Arts Practices
- Ontario Arts Council, Deaf Artists and Artists with Disabilities
- National Access Arts Centre (Calgary)
- Kickstart Disability Arts & Culture (Vancouver)
- Tangled Art + Disability (Toronto)
- Workman Arts (Toronto)

Media

- Accessible Media, Inc. - Canada's premier accessibility-related tele-communications provider
- Global Accessibility News - Provided by the Global Alliance on Accessible Environments and Technologies

Deaf and Hard of Hearing Communication Supports

- Bell Relay Service - A free service that facilitates communication between audio telephones and people who use TTY (Text to You)
- Canadian Hearing Services - Point of contact/provider for sign language and real-time captioning services.
- SRVCanadaVRS - A free video relay service for people who use sign language

Further Considerations

- Government of Ontario, Planning Accessible Events
- Ontario Social Services Association, Guide to Conducting Accessible Meetings
- McMichael, Seven Steps: A Guide to Developing and Delivering Inclusive Programs within Arts and Cultural Organizations
- Humber College, Making Accessible Media
- Zbitew, A & Tangled Arts and Disability, Accessibility Toolkit: A Guide to Making Arts Spaces Accessible

… A simple detail! Provide an outlined obstacle-free area for persons in wheelchairs to exit the elevator freely.

- Photo taken at the Whitehorse Yukon Public Library.

Asking for Workplace Accommodations: A Guide for People with Disabilities Working in the Cultural Sector

-Laurie Proulx

Asking for Workplace Accommodations:

A Guide for People with Disabilities Working in the Cultural Sector

People with disabilities often experience barriers that limit full participation in different aspects of life, including the workplace. People with disabilities are diverse and face many challenges in daily life through lack of accessibility and communication support, inaccessible venues, and the attitudes and beliefs of people. These barriers mean that people with disabilities often need to request workplace accommodation so they can fully participate in the workplace. This guide explains the process of asking for accommodations in the workplace for people with disabilities working in the cultural sector.

Statistics Canada estimates that 22% of the Canadian workforce is made up of people with disabilities (2017). Occupation groups tied to the cultural sector are not exempt from this reality. Applying that ratio to the 2019 CHRC Labour Market Information Study that states there are 798,000 cultural workers in Canada, that's over 175,000 individuals.

In recent years, there is increased attention and desire to removing barriers to participation of people with disabilities in the workplace and many are asking that people with disabilities be directly represented in the cultural sector. In addition to accommodating people with disabilities, employers can take action to remove systematic barriers in employment by creating accessible and inclusive workplaces.

Art by Karen.D. Miller, "With these hands", https://karendmillerstudio.com/

Prepared by Laurie Proulx, Consultant for the Cultural Human Resources Council, 2022

The Cultural Human Resources Council acknowledges that this guide was adapted from a similar workplace accommodation tool developed by the Canadian Psoriasis Network, Unmasking Psoriasis and Canadian Association of Psoriasis Patients.*

Resources:

- Being Seen: Directives for creating authentic and inclusive content
- Tangled Arts and Disability

What is workplace accommodation and what are the employer's responsibilities?

Workplace accommodation is simply a way of changing or adapting the work environment or working conditions to support people with disabilities. Workplace accommodation is part of the **duty to accommodate** that comes from federal, provincial, and territorial human rights law. For a full list of federal, provincial, and territorial human rights codes, refer to the human rights commission noted in the Resources section below. The duty to accommodate requires employers to offer reasonable accommodations for certain reasons like disability, age, family status, and gender identity. It acknowledges that that some people need to be treated differently in order to prevent discrimination.

Workplace accommodation needs to be reasonable and provided to the point of **undue hardship**. When considering requests for accommodation, a number of factors are considered, such as significant financial costs and the size and resources of the employer. Other factors that can be considered are disruption of operations, morale problems of other employees that could result from using the accommodation, and substantial interference with the rights of other employees.

Employers can decide to not accommodate if the job requirement is considered a **bona fide occupational requirement**. This is a legal concept that means the requirement is essential to the job, put in place with good intentions, and connected to the work. It does not mean that the employer prefers not to change or that it is inconvenient. For example, an employer may require a physical requirement to lift a certain amount of weight, or mobility, for performing the job of a stage technician. However, the employer is required to consider alternate ways that the person could do the work, or if it can be accomplished in a different way. The employer must keep accommodation requests private and confidential and monitor that accommodation needs are being met on an ongoing basis.

Resources:

- Canadian Human Rights Commission
- List of provincial and territorial human rights commission
- Guide to the Canadian Charter of Rights and Freedoms
- What is the Duty to Accommodate? (Canadian Human Rights Commission)
- ARCH Disability Law -My Rights at Work: Limits to the duty to accommodate in Ontario
- ARCH Disability Law - Fact Sheet – My Rights at Work: Requests for disability-related accommodation in Ontario
- L'accommodement raisonnable (Commission des droits de la personne et des droits de la jeunesse)
- Duty to accommodate human rights guide (Alberta Human Rights Commission)
- Duty to accommodate (British Columbia Human Rights Commission)
- Convention on the Rights of Persons with Disabilities (United Nations)

When can I access workplace accommodation?

The duty to accommodate can be accessed at any time, but can be helpful when:

- starting a new job
- negotiating a new contract
- recovering from health challenges
- experiencing challenges in completing job tasks

The duty to accommodate starts when the employer is made aware of the need for accommodation. Accessing accommodation that meets the need of people with disabilities is an ongoing requirement and should be regularly evaluated by both the employee / worker and employer to ensure the specific and unique needs of the individual are being met. The worker or employee must advise the employer of disability related restrictions and limitations.

In some situations, employers have the **duty to inquire** with the employee / worker if they notice changes in behaviour, such as struggling with mental health issues. In this case, they might ask if

accommodations are needed. The duty to accommodate and duty to inquire are described in federal, provincial, and territorial human rights laws (for a full list of federal, provincial, and territorial human rights codes, refer to the Resources section below).

Resources:

- Canadian Human Rights Commission
- List of provincial and territorial human rights commission

What accommodations can be made to support people with disabilities?

There are a range of different accommodations that can be made to better support people with disabilities. The type of accommodations will vary significantly based on the nature of the disability. For example,

- people who are d/Deaf or hard of hearing may benefit from American Sign Language (ASL - English) and/or Langue des signes Québécoise (LSQ - French) interpreters, captioning services, or accessible software;
- people with physical disabilities may benefit from a flexible work schedule, additional periods of rest, or working from home;
- people that are neurodivergent may benefit from speech dictation software and/or note takers
- people with low vision may benefit from accessibility software and various talking devices.

It is important to personalize and adapt the accommodations to your individual needs. You play an important role in identifying and communicating the need for accommodation and actively contributing to discussions about solutions. The Job Accommodation Network is a U.S. based network that provides resources on workplace accommodation by disability, topic, and limitation. This resource can provide a starting point as you determine workplace needs and changes.

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Please note that if you are an employee, the employer is required to pay for any additional costs of workplace accommodation. There are some programs noted in the resources section that help pay for the costs of assistive devices if you are self-employed.

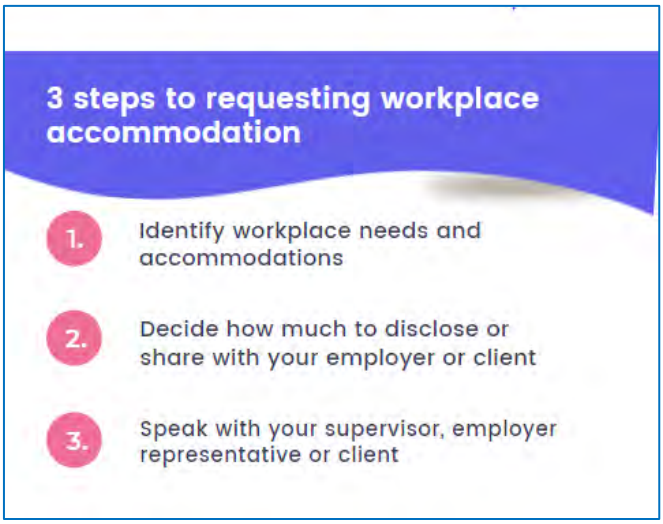
Resources:

- Ontario Assistive Devices program
- March of Dimes assistive devices (physical disabilities)
- Canada Council for the Arts (access support)
- Ontario Council for the Arts Accessibility Fund: Project Support

What is the process to access workplace accommodation? How does this differ if I'm an employee compared to an independent contractor?

There are many different working arrangements in the cultural sector. There are typical jobs where you are an employee, and the employer has more control over the work of an employee. You may also negotiate independent contracts where you negotiate a specific rate, schedule, and deliverables and have more control over the work. Disability-related accommodation applies to many employment arrangements including typical employee-employer relationships and independent contractors.

The process for accessing workplace accommodation will be different depending on the policies and processes used by your employer or client(s). It could be as simple as having a conversation with your supervisor who can implement the changes immediately, or it might involve multiple discussions, documentation from your medical specialist, and completing several forms.



There are three main steps to prepare and request workplace accommodation and these steps are explained in the following section.

1. Identify workplace needs and accommodations

- Review human resources or other policies and see if the organization has a process for considering or making accommodation requests.
- Ask yourself what might make the most difference at work, for example:
    a. Are there any work tasks that are difficult to do because of disability (e.g., difficulties standing)?
    b. Are there parts of the job where you aren't performing to an acceptable standard due to disability (e.g., documents are not accessible)? If so, what can change?
    c. If you could change two or three things about work, what would they be?
- Your medical specialist can be helpful to identify functional limitations and restrictions.
- Use the Job Accommodation Network to identify the changes or accommodations you need at work.
- If you belong to a union, you may wish to speak privately with the local union steward.
- Human resources staff might also be helpful but please be aware that they are representatives of the employer or management.

2. Decide how much to disclose or share with your employer or client

- Deciding what information to share and when to share it is a personal decision that only you can make.
- You do not need to disclose a diagnosis (if you have one) to access workplace accommodations.
- Employers can only ask for information about functional limitations and restrictions that affect you at work due to your disability.
- Speak with the manager, workplace representative or client and remember it will be ongoing discussion and collaboration is critical.

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- Disclosing or sharing information is a process, not a one-time event. You can decide to share information one piece at a time and assess whether you are comfortable in sharing additional information.

3. Speak with your supervisor, employer representative or client

- You play an important role in shaping the discussion and your employer or client must involve you in the accommodation process.
- The discussion may be a single conversation or may take multiple conversations.
- Share the top two or three workplace limitations and mention what support or accommodations can help you at work.
- Share what you are comfortable disclosing about your health status and limitations.
- Ask that a written accommodation plan be developed with regular check-ins to ensure it meets your needs.
- The supervisor, employer or client makes the final decisions about what accommodations are implemented; however, they need to involve you in the process.
- This process might be a little different for contract work. You can negotiate workplace accommodations as part of contract negotiations as the duty to accommodate applies to independent contractors.

Resources:

- Workplace disclosure decision guide (developed by Realize Canada)
- Arthritis in the Workplace: Resources for Patients, by Patients
- Tip sheet on negotiating (developed by Work in Culture Ontario)

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More resources – accessibility funding for organizations (examples)

- https://www.canada.ca/en/employment-social-development/programs/enabling-accessibility-fund.html
- https://aoda.ca/funding-for-workplace-accommodations-in-ontario/
- https://smallbusinessbc.ca/workplace-accessibility-grant/
- http://www.habitation.gouv.qc.ca/programme/programme/petits_etablissements_accessibles.html (available in French only)

Prepared by Laurie Proulx, Consultant for the Cultural Human Resources Council, 2022

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Inclusion, Diversity, Equity and Accessibility - Demystifying Organizational Policy Writing

-Grégoire Gagnon

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Introduction

Inclusion, diversity, equity and accessibility or IDEA is an important topic in human resources for the cultural sector and society in general. This desire to do better is part of the larger whole of sustainable development.

Many want to improve IDEA in their cultural organizations. Often the starting point and the process represent challenges for leaders who are overwhelmed and/or lack the resources and tools necessary to take action. Using simple and effective theoretical frameworks, CHRC hopes to demystify the process that starts with your desire and leads to the adoption of organizational policies that support your IDEA vision. The entire process allows you to reflect on how this vision aligns with your organization's mission and objectives, your organizational culture, the composition of your work teams as well as your artistic/cultural production.

This tool is not a replacement for the skill, knowledge and experience of consultants and firms specialized in the field. The tool is intended to be used as a guide for those who would like to start with modest steps taken in good faith.

This tool should not be considered an end in itself, but as a starting point, and does not constitute legal advice of any kind. This document is provided for information purposes only. Each person is individually responsible for their policies as well as their development and application.

The content of this document may generate more avenues for reflection than it does answers—that's okay!

You will need to be curious and engage in self-criticism before taking action with goodwill, boldness and confidence.

Purpose of the tool

To help managers and those responsible for their organization's IDEA program write IDEA organizational policies with confidence. If the organization takes a committed approach, designing and developing policies can be exciting.

IDEA policy—context for development

To get ready to do the work, equal parts curiosity, self-criticism and goodwill are necessary.

CURIOSITY

Questions to ask before starting the exercise:

"Why"

- What is **prompting** this exercise?
- What is **motivating** us to do an exercise to improve our IDEA?
- What do we know about our current **situation**?

"What"

- What do each of the IDEA components mean?

Why... prompts, motivation and situation

It's clear that we are addressing the subject because of a **prompt**—is it extrinsic or intrinsic?

- Have we recently been criticized on the subject?
- Have we received a directive from our bosses (BOD or other)?
- Have we been affected by an event that was external (or internal) to our organization?

- Do we want to advocate for an identity group that we are part of?

In terms of **motivation,** is our impulse altruistic or selfish?

- Are we trying to correct something?
- Are we trying to protect ourselves or protect others?
- Do we want to be champions for others?
- Do we want to assert our identity?

If motivation is selfish or the result of an event that affected one of our close friends, relatives or colleagues, objectivity may be a challenge.

In any case, it is difficult to be purely altruistic. Selfishness often masquerades under the disguise of altruism.

Establishing the current **situation**—the extent to which the organization reflects diversity—isn't always obvious. It's necessary to take a critical look both internally and externally.

Taking stock of the internal situation can be challenging, especially if we aren't transparent and don't fully acknowledge what is **prompting** and **motivating** the exercise.

In addition, asking questions internally to better understand the state of diversity in the organization can be tricky. The typical size of a cultural organization makes this even more difficult. Conducting a survey in an organization with two to five employees doesn't allow for much anonymity. It can also be outright impossible for a small organization to be representative.

SELF-CRITICISM

Be forewarned, any writing exercise that deals with the fundamental elements of a person's identity and the notion of respect for others must be approached with care. It's possible to mitigate the risk of offending and/or attracting criticism by being tactful, empathetic and a good listener. This is especially necessary if the person in charge of the IDEA program is part of the global minority. In any case, progress requires an effort and commitment to the outcome is vital.

What is our level of comfort/discomfort with the exercise?

- Are we truly open-minded about the subject?
- How objective can we say we are with the exercise?
- Are we prepared to accept that our reasoning may be faulty?
- Do we have biases to address or consider?
- How can we be sure that we are able to identify our biases?
- What kind of leadership do we want to embody?
- What should our respective roles be in this exercise?
- In terms of capacity, do we have the expertise and skill to undertake this kind of exercise?
- How do we respond to the potential adversity that may arise from a thorny discussion?

Looking at ourselves with a critical eye and taking account of our own biases improves our objectivity and prepares us to face adversity.

GOODWILL

Once you have explored questions related to **curiosity** and **doubts,** you have to trust yourself to take action so you can be part of the solution. It's impossible to write policy without committing resources to it. You can expect these resources to include a combination of energy, time and/or money.

You can also add open-mindedness: Be prepared to be challenged (by yourself or others), to possibly change your own frame of reference and to examine your biases (conscious or otherwise).

Stay the course, it's worth the effort.

Essentials for policy development

One of the lessons learned from CHRC's *Respectful Workplaces in the Arts (RWA)* workshops: Creating workplaces that are based on respect requires:

- Leadership
- Common points of reference
- Common means of communication

Leadership is demonstrated in part by your commitment to an exercise in change. To maximize the return on effort, we can add open-mindedness and tolerance of different ideas. This leadership should demonstrate **empathy,** a **tolerance for differences** and **open-mindedness**.

This same leadership must stay grounded in the essential elements of the organization:

- Mission
- Objectives
- Values

Common points of reference are central to organizational policy development and will be discussed in "Process for developing the policy sections" further in this document.

Regarding **common means of communication,** we will assume for the moment that you have a common language of communication with your interlocutors and stakeholders.

Reflection and organizational policy writing

Reflection

To make it easier for your organization to write an IDEA policy, go back to the fundamental elements of your organization:

- What is its mission?
- What are its objectives?
- What are its values?

We can call the first organizational decree M/V/O+V (mission, vision, objectives and values). The vision component has been set aside for now as it portrays an image rather than serving as a beacon for governance and operational decisions. The vision is never included in the articles of incorporation simply because the image, or its desired perception, that an organization projects is subject to change. **The organizational raison-d'être *normally* should not change.**

The mission is the starting point. Without it, the organization doesn't exist and is directionless. Objectives must be articulated in order to show the results that the organization has achieved. This can also be translated into impacts.

If the organization's mission and objectives aren't clearly articulated, you need to go back to square one and clarify them. If you don't, your IDEA exercise will be anywhere between futile and harmful.

> *Was our organization founded to serve a broad community or a select group?*

Also note that when an organization is founded, its values aren't a consideration. Values are left to the discretion of the board of directors. Although values aren't essential when an organization is founded, it doesn't take long before they become so. If your organization hasn't created a values chart approved at the organizational level, you'll need to create one. This element is essential when articulating any code of conduct, workplace directive or imperative in terms of a starting point for the formulation of an IDEA policy.

The objectives are the organization's more tangible orientations that seek to fulfill its mission.

Is the cultural programming in and of itself exclusive?

The previous two questions, easily modified depending on context, assess if the organization is flexible enough to commit to IDEA.

For example, two non-profit organizations in an underprivileged area promote participation in musical performances for youth aged 8 to 20. One is a choir, the other a string orchestra. In both cases, music can be accessible to all participants, but a choir is more accessible because it doesn't require the purchase of an instrument. The choir can be more inclusive, which improves the likelihood of a diverse group of participants.

The notion of accessibility in this case is about facilitating participation; it's not about how hard it is to physically get there. Hence the importance of clearly defining each of the IDEA terms within the context of the organization. It could be that both organizations practise in locations that aren't equipped with ramps or elevators, making it difficult for a person in a wheelchair to participate.

In both cases the organizations can show inclusiveness by welcoming youth from all religious, ethnic and other backgrounds. However, in both cases the organizations serve some people while excluding others (individuals over the age of 20).

As in the box above, sometimes it's necessary to go beyond the first level of the M/V/O+V elements in order to take a critical look at the organization's current reality. Ask yourself the following questions:

- Whom do we serve?
- How might our activities be closed or open to different people?
- What are the barriers to access?
- Does the production process as such allow for inclusion?
- Is the product interesting to a variety of people?

These questions also allow us to survey the organization's internal stakeholders (board of directors [BOD], staff, members, volunteers) and external stakeholders (partners, collaborators, funders, clients).

In theory, the mission and objectives should be clear, fully understood and upheld by a coherent set of values. The M/V/O+V decree should be communicated openly to all stakeholders and be available to all interested parties.

The GDEIB, from The Centre for Global Inclusion, is another approach for reflection and internal evaluation. It's discussed in the *Other Tools* section at the end of this document.

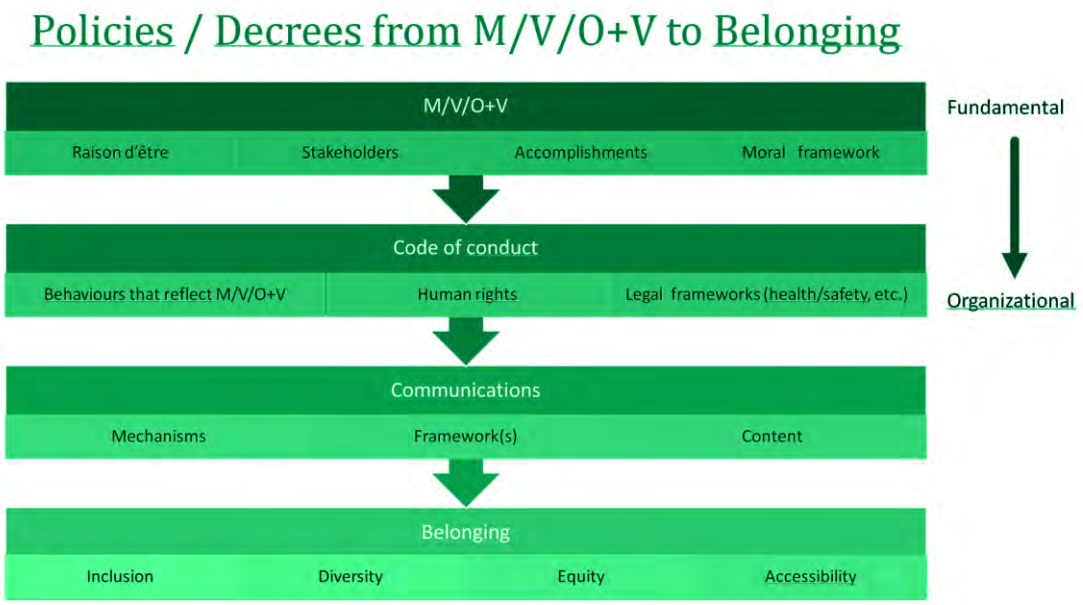
Moving from M/V/O+V to IDEA

Although it may seem daunting...

Beyond the basics (M/V/O+V), it's now mandatory for Canadian institutions to have a code of conduct and/or a respect/anti-harassment policy. This type of decree/policy is essential for prevention within the organization and communicates the standards and expectations of the legal frameworks regarding harassment and discrimination (particularly human rights). With a code of conduct, it's possible to address interpersonal behaviours (both required and prohibited).

One final policy that can facilitate the eventual development of an IDEA policy is a communications policy. It can be used to clearly state the organization's expectations regarding communications that might deal with thorny topics. It can even provide a framework for sending congratulations. In this policy, you can indicate to whom communications should be addressed in order to provide the organization with mechanisms for communication that are free of conflicts of interest (perceived or actual).

Note that here the policies move from the level of fundamental decrees (M/V/O+V) to functional or organizational policies. Breaking policies down as above gives you smaller and more focused elements/milestones as opposed to trying to include everything in one document for your organization.



It also becomes much easier to begin writing an IDEA policy because several elements pertaining to diversity, such as human rights and appropriate and inappropriate (discrimination/harassment) behaviours, have already been addressed.

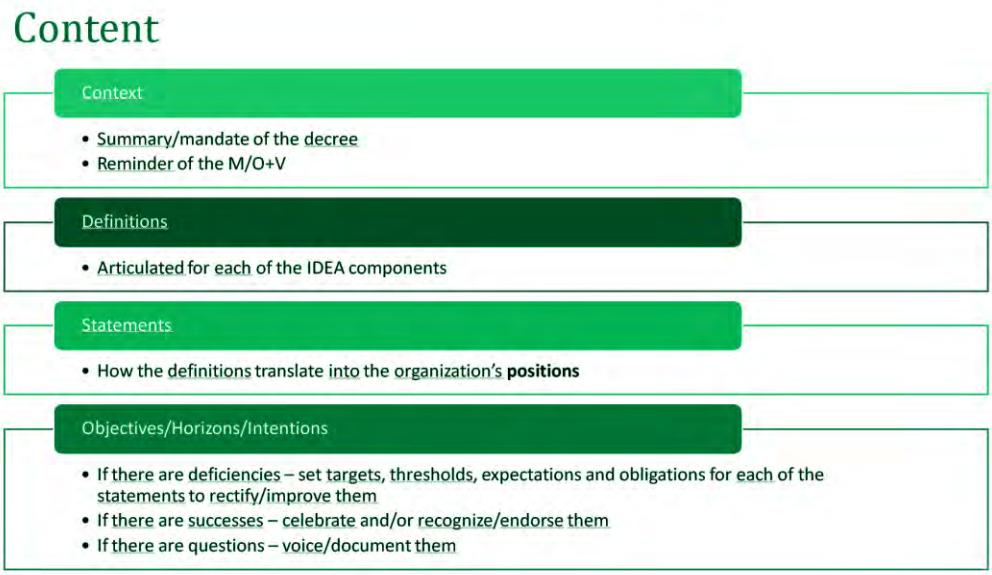
IDEA policy content

An IDEA policy can be written following a fairly simple and effective format.

The policy should include four parts:

- Context
- Definitions
- Statements
- Objectives/Intentions

Each of the four parts includes important subsections to support the policy.



The context or executive summary is a good reminder why and in what context the decree is being prepared. It's useful to connect it to the organization's mission, objectives and values.

- Definitions can be articulated for each of the IDEA components.
- Statements allow you to translate the definitions into the organization's positions on the IDEA components.
- The objectives or intentions help the organization identify its targets and commitments with respect to its positions (statements). They can also serve as a reminder of the progress that has already been made. This is also the ideal place to put open-ended future-oriented IDEA-related considerations for the organization.

You may note that between context and commitments, we see a progression from more static things (the organization's mission isn't subject to change) to more dynamic things (the targets to be achieved indicate movement).

To be avoided in IDEA policies: any kind of promise or creation of expectations of demands or objectives that are impossible to achieve.

Guidelines for the different sections of the decree

CONTEXT

Stick to the relevant facts and information—don't editorialize or use overly creative writing. This makes it possible to express the context and intentions of the decree so that everyone is on the same page and no one veers off on tangents.

DEFINITIONS

Resist the temptation to create them from scratch. It's a good idea to consult different sources and document them to articulate definitions in the true sense of the word: objective and clear. A notion of timelessness can be added to this. If your definitions are subject to change, they will read more like statements or targets.

STATEMENTS

Now that you have communicated the IDEA principles in an objective manner, you can write statements that demonstrate a contextual interpretation of your definitions for your organization.

"At XYZ, we value the participation of people from diverse ethnic backgrounds and want them to participate as (people onstage)."

Each statement should support the definition you wrote and adopted.

You might have one to three statements of principles per IDEA component. If you have more than three sentences per IDEA component, you are either clarifying your definition or are formulating objectives/intentions.

OBJECTIVES/HORIZONS/INTENTIONS

Typically, this section and the statements section generate the most interest and emotion while being the most dynamic. This is due in part to the orientation toward the future and/or the opportunity to highlight past successes.

This is where you can use a more editorial and/or subjective writing style. However, make sure you list targets and commitments that are consistent with your definitions and statements.

It's appropriate to include the assignment of responsibility and accountability as well as transparency commitments. This notion of transparency can include foreseeable challenges that haven't been formally addressed beforehand due to their sporadic or ephemeral nature.

Whether it is to maintain the status quo or improve it (it goes without saying that it's pointless to articulate a desire that isa detriment to the present), setting a target or an objective that is easily understood by indicating who will be responsible and accountable for it within a certain timeframe makes it much more credible and serious.

In any case, *don't set unrealistic objectives—they will come back to haunt you.*

Instead, be transparent, acknowledge the challenges the organization faces and acknowledge the circumstances that have an impact on the achievement of your intentions. NB: If the definitions and statements can't be met by the objectives, cognitive dissonance will result and you will have to rework the definitions and/or statements. Sometimes it's enough to recognize limitations.

Pay attention to word choice in your intentions/objectives.

> *Before starting to write the definitions and objectives, we recommend that you read the following section on the policy development process.*

Process for developing the policy sections

DEFINITIONS - PROCESS

To come up with definitions for each of the terms Inclusion, Diversity, Equity and Accessibility, you can start by writing a personal definition for each one, but this will most likely create bias and you will probably get caught up in the primacy effect. Chances are you will compare your definitions to others and, like most folks, you will probably prefer your own.

Use two, three or four different sources: dictionaries, lexicons and terminology banks, preferably those that are publicly available and up to date. No need to pull out your 1984 Webster's pocket dictionary. Use free online dictionaries instead. Use these sources to ***create a realistic definition*** for each term that clearly describes the notion in question. Don't start developing IDEA targets or objectives. Simply produce a definition so that the readers of your eventual policy will understand the starting point for each notion.

Make a table and identify how each of the key words can be expressed within your mission/objectives and values, or, if applicable, how your fundamental elements could translate into IDEA policies.

Clearly differentiate between that which is an existing expression of your M/O+V and that which is a possibility/opportunity.

Developing **definitions** – process

Tip: Creating a table in which elements of the definitions meet or express our M/O+V can help articulate the definitions and/or statements.

	Mission	Objectives	Values	Process or inputs
Inclusion				
Diversity				
Equity				
Accessibility				

Be careful not to create definitions based on current and/or unfolding events.

If definitions were created before consulting objective sources, do you see a need to change your original definitions? New information may lead to improving initial iterations. It is well-advised to take the time to clearly express thoughts in order that they can be communicated more easily to others in writing. *Do you need to give examples?* If so, your definition may not be clear enough. As much as possible, favour the use the of positive instead of negative within written definitions: “the absence” of something instead of “isn’t.”

In reviewing any examples that were crafted —could they serve as inspiration for the statements section?

Overall, remain as objective as possible. Avoid judgments and biased views.

STATEMENTS AND OBJECTIVES - PROCESS

Statements should support and be supported by your definitions. Your statements may refer to the past, but they should have a sense of continuity that extends to the present and reaches toward the future. Objectives are, obviously, future-oriented.

The difference between statements and definitions lies in the fact that statements express and demonstrate a position (subjective) whereas a definition is objective.

The difference between a statement and an objective is the potential measurement of a goal. A statement may remain general; “at XYZ, we recognize our rich tradition of working with local communities” or “at XYZ, we strive for representation (within our audience)”. Whereas “XYZ will hold bi-annual open-access consultations with local communities” or “XYZ aims for better representation between group A and group B over the next X programming cycles”.

In that both statements and objectives represent a subjective position, it is suggested they be developed together and the contrast between the measurable and non-measurable aspect would help distinguish a statement from an objective.

A potential pitfall that should remain front of mind while crafting objectives: overly specific targets may in fact encourage tokenism.

It's helpful to be clear in intentions:

- What must be maintained or improved?
- What are the concrete actions in terms of targets and timelines?
- Assignment of responsibilities and accountabilities.

Word choice is very important. Make sure to use action verbs: *"The organization commits to / The organization aims to / The organization wants to..."* lends a different character to the objectives and intentions.

General considerations

The following questions are general in nature and should be part of the thought process for any policy-writing exercise.

- What kind of establishment are we operating?
- What level of influence does the decree have?
- What kind of decree do we want?
- What is the decree's scope in terms of time?

So far, this document has discussed work to be carried out in organizations, with the assumption that the majority of people reading it work for non-profit organizations. However, some might work for a for-profit business or charitable organization. Depending on the context, there may be varying degrees of restrictions on the flexibility of the establishment's operations and/or commitments.

Together, the type of establishment and the desired level of influence can have a great impact on the final authority in terms of approval of any decree or policy.

The type of decree and the scope over time have a great impact on the development strategy. For example, an IDEA policy that aims to integrate multiple demographic factors with ambitious but well-thought-out targets can be established for a five-year implementation process with annual reviews. A directive to the artistic director regarding the planning of a specific event will have a different approach

and wording. We also see that these two decrees would have different levels of influence regardless of the type of institution in which they were developed.

It becomes important to think about the **scope of a decree**: is the aim something that will have an impact on everything (e.g., Broad recruitment practices, planning, partnerships, audience) or an impact on aspects of the organization (e.g., certain lines of programming, altogether new programming, the composition of certain work teams or outside contributors)?

What, in terms of the scope over time, is being endorsed: a commitment to an immediate/one-time change or a change in culture (long-term)?

NFPs AND GOVERNANCE MODELS

Another point of influence on the approval of a decree is the governance model under which an organization operates. Less-involved models such as a policy or advisory group board of directors (BoD) would tend to leave decree development to the executive or operational levels, but it's quite possible that the importance of the public and/or political aspects of the decree motivates a BoD to become involved. The following will be covered in the foreseeable challenges section: delegation, the number of validations and the levels of validation.

Foreseeable challenges in IDEA policy articulation

The following is a list of challenges that can be part of the process in general:

- Decision-making authority—delegation
- Building or winning consensus
- Timeline/validation milestones
- Level of inclusion/exclusion in the process
- Communication problems/lack of understanding between interlocutors
- Individual demands vs. collective will
- Superficiality
- Types of leadership

Here are some tips for overcoming these challenges.

The first challenge is delegating the task or empowerment of the policy preparation. It's imperative that the delegation come from the appropriate entity/authority within the organization. If the policy applies to the entire organization, it's natural for the BoD (in the case of NFPs) to grant the mandate.

When choosing a person for the task, will they be chosen for:

- Their *knowledge of IDEA subject matter*?
- Their management skills to *supervise the effort* and see it through to completion?
- Their leadership/diplomacy skills to *reconcile the different positions* (individual and/or collective) on the subject?
- Their skills in terms of the *task to be carried out*?

> *Clearly explain the reasons for choosing the person(s) responsible for the task and, of course, respect the mandate given to them.*

Set milestones/timelines/stages of production and validation gates—i.e., at what points in their work and by whom should those responsible for the policy-writing project have the progress validated.

Another decision that relies heavily on communicating expectations: If you work in consultation/committee, make it clear whether those consulted are doing so in an informational (sounding board/focus-group, recommendations, suggestions), influence (steering/direction) or in a decision-making capacity (veto option, acceptance/refusal). It can be frustrating for people who are asked to participate to realize their input was factored at a lower level than they expected.

There is a direct correlation between the mobility/flexibility of an exercise and its completion in relation to the number of people involved in the writing decisions. The greater the number of participants, the longer it takes to reach consensus. On the other hand, consulting a greater number of participants

usually generates a richer and potentially more articulate text. In either case, it can be tricky to avoid discussions getting bogged down by personal or individual demands.

External contracting has its share of difficulties. When hiring an outside consultant, there is always a learning curve with regard to the starting points (M/O+V, code of conduct, etc.). The upside is usually a more objective perspective.

Keeping the work "inhouse," can lack objectivity.

Notwithstanding the issue of available resources, revisit the questions in the first section (IDEA policy—context for development) in order to choose the best option. For example, if the organization has just been through a scandal that has put its credibility on the line, it would be better to hire someone from the outside. On the other hand, a stable organization that is motivated simply by sustainable development could spend several months on reflection and internally managed work.

It's important to let the appointed individuals do their work and submit approval of the entire document or entire sections rather than micro-managing or group-spelling small parts of the work in progress. For example, trying to get just one of the definitions (e.g., inclusion) approved inevitably leads to debates on the other definitions (e.g., diversity or equity) rather than the one under consideration. Considering the document as a whole will provide a better understanding of the contribution of each individual section in contrast to the others. However, an incremental process with provisional approval granted section by section can keep you on track if you follow the suggested order (definitions before statements and objectives).

Delegation and leadership styles and types

Two sayings to consider:

- "No matter how many people are holding a hammer, everyone must wait their turn to hit the same nail."
- "One person making decisions leads to tyranny, two lead to an argument, three lead to an agreement."

As mentioned above, it's important to let the appointed people do their work before proceeding with the validations. It might be that only one person is responsible for making the policy, but it's unlikely that just one person is responsible for approving it. The participants may have different types and styles of leadership. Each person's characteristics can help with the ideation, development, presentation, approval and communication of the policy.

Food for thought… Different types of leaders will bring different strengths—a combination of the three is ideal, but you always need a place to start. Building a team that is led by a **visionary** person is great, but if that person doesn't have an eye for detail or execution, the product will be unfocused or unworkable. Someone with a reputation as an excellent **spokesperson** will be able to "sell" the decree, but it takes a skilled person to articulate it. A **task-oriented** person would be the most suitable for writing, but will they be sensitive enough?

In terms of leadership style, you must either align it with the governance or recognize the creative tension that is voluntarily created.

In summary

1. To get started on this work, establish the mandate for the leaders of the effort and identify the committees or individuals who will support the initiative.

2. Once the mandates and timelines are determined, start with a review of the organization's fundamental elements and a healthy dose of self-assessment.

3. Develop the four parts of the policy in order, following the guidelines, processes and suggestions.

4. Validate the policy at the necessary milestones until it's adopted.

Other tools

CHRC also offers other resources to help you achieve your IDEA objectives, including the HR Management Toolkit and the Respectful Workplaces in the Arts workshops. It's easier to approach IDEA if you start with the notion of basic respect.

For more in-depth work in terms of reflection and preparation, the Centre for Global Inclusion and its tool Global Diversity, Equity & Inclusion Benchmarks offer an excellent (free) framework for your work. This theoretical framework provides a reflection on four groups (foundation, internal, bridging and external), with 15 categories and a total of 275 benchmarks to identify which of the five levels an organization is at in terms of equity, diversity and inclusion. This makes it easier to establish where the organization lies on the five-level scale.

THE FIVE LEVELS[1]

For each category, the benchmarks are divided into five levels that indicate progress toward the best practices in that category:

LEVEL 5: BEST PRACTICE

Demonstrating current global best practices in DEI; exemplary.

LEVEL 4: PROGRESSIVE

Implementing DEI systemically and showing improved results and outcomes beyond what is required or expected.

LEVEL 3: PROACTIVE

A clear awareness of the value of DEI; starting to implement DEI systemically. This is what is required and expected of all organizations.

LEVEL 2: REACTIVE

A compliance-only mindset; actions are taken primarily to comply with relevant laws and social pressures. Doing the bare minimum.

LEVEL 1: INACTIVE

No DEI work has begun; diversity, equity, and inclusion are not part of organizational goals.

Contact CHRC about a Respectful Workplaces in the Arts workshop in order to receive relevant information related to the legal frameworks in your province or territory.

Happy reflecting, happy writing and much success!

[1] From Global Diversity, Equity & Inclusion Benchmarks: Standards for Organizations Around the World © 2021 Yvonne (Nene) Kegomoditswe Molefi, Julie O'Mara, and Alan Richter. Used with permission. All Rights Reserved.