



JEDI ACTION PLAN

2023-2026



Foundation of Greater Montréal

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Context

The values of justice, equity, diversity, and inclusion are at the heart of the Foundation of Greater Montreal's (FGM's) mission, as the Foundation aspires to reflect the community it serves.

To intentionally break down barriers and create an inclusive society, FGM listens, learns, and implements measures within its organizational culture, grantmaking, investments, decisionmaking, and actions.

We recognize that discrimination against individuals and groups exists both directly and systemically within society, and that the various forms of discrimination are intersectional, can be experienced simultaneously, are inseparable from one another, and are not hierarchical.

FGM is also committed to:

- making ongoing structural adjustments to its practices, including its investments and grants;
- continuously educating ourselves on issues of justice, equity, diversity and inclusion;
- raising awareness among our stakeholders and providing forums for dialogue, exchange and encounters;
- ensuring that the composition of its staff, volunteers and consultation circles reflects the community it serves;
- measuring and evaluating its progress.

The Foundation recognizes that Indigenous Peoples hold a distinctive place stemming from their status as the first inhabitants of the land we now call Canada, their connection to these lands, the Aboriginal and Treaty rights, and international law.

To operationalize FGM's commitment to reconciliation and deepen our organizational transformation work, a Roadmap towards Reconciliation was also drafted. This document is inspired by the principles promoted by the Truth and Reconciliation Commission of Canada's Calls to Action, the United Nations Declaration on the Rights of Indigenous Peoples (UNDRIP), the findings of the Commission of Inquiry on Relations between Indigenous Peoples and Certain Public Services (*Viens Commission*), and many other recommendations.

Action Plan

Internal

Organizational Culture

➤ **Fostering inclusiveness within FGM's organizational culture**

| Actions | Indicators |
|--|---|
| 1. Organize a process of reflection and co-creation towards articulating a shared definition of an inclusive culture specific to FGM through the involvement of employees, Board members, and volunteers | Number of collective intelligence activities in teams, with the Board of Directors, and with volunteers |
| 2. Publish a document that presents FGM's JEDI practices | Published document |
| 3. Provide religious, cultural, ability-, or gender-based accommodations (holidays, events, use of pronouns, etc.) | Numbers and types of accommodations offered |
| 4. Recognize and value a multitude of work styles and different methods, in a process of continuous improvement | Employees' appreciation of the organizational culture (satisfaction survey conducted annually) |
| 5. Create and disseminate Inclusive Writing Guidelines for internal use | Publication and use of the Guidelines by employees |

➤ **Gradually implement horizontal and participatory management practices at FGM**

| Actions | Indicators |
|--|---|
| 1. Promote the transfer of knowledge and information between managers and team members | Improved satisfaction with the democratization of the structure (assessed in the employee satisfaction survey) |
| 2. Foster collaboration between departments on one-off projects to break down silos | Number and types of interdepartmental projects implemented |
| 3. Strengthen transparency and consultation processes on the part of the management team | Assessment of the level of transparency and consultation in decision-making (in the employee satisfaction survey) |
| 4. Diversify the participation and facilitation of meetings of FGM's employees and internal committees | Number of staff meetings and committees led or co-facilitated by different people |

➤ **Foster a climate of open expression and participation in the organization's development for each team member**

| Actions | Indicators |
|---|---|
| 1. Set aside time for conversations about JEDI-related topics and promote open sharing | Number of exchange activities on JEDI topics |
| 2. Create an open space for dialogue and a <i>brave space</i> | Assessment of the level of psychological safety felt in discussion spaces (evaluated in the employee satisfaction survey) |
| 3. Set up alternative channels for participation for those who are not comfortable speaking up (suggestion box, other) | Approaches tested and lessons learned |
| 4. Foster and encourage learning organization model, where mistakes are welcome and understood and these mistakes provide opportunities for learning and growth | Approaches tested and lessons learned |

Governance

➤ Apply JEDI practices in FGM governance structures (Board and committees)

| Actions | Indicators |
|---|--|
| 1. Implement an ongoing JEDI training plan for the Board and committees, including formal and informal training opportunities (teambuilding, brave conversations, etc.) | Number of training/awareness activities conducted with the Board and in committees |
| 2. Apply the roadmap for updating governance policies based on the JEDI Plan | Number of policies updated |
| 3. Integrate JEDI objectives into each committee work plan | Number of committee plans that incorporate JEDI objectives |
| 4. Convene public AGMs | Number of public AGMs held |

➤ Ensure the diversity of the Board of directors and the committees that meet the FGM's needs in terms of skills

| Actions | Indicators |
|---|--|
| 1. Update competency matrices and self-identification forms, and implement intentional measures to improve representation | Modified selection criteria and intentional measures adopted |
| 2. Consider public calls for nominations | Board buy-in to the process |

➤ Prioritize reconciliation and collaboration with the Kanienke'hà:ka communities of Kahnawà:ke and Kanehsatà:ke and other Indigenous communities in Greater Montreal

| Actions | Indicators |
|---|---|
| 1. Adopt a Roadmap towards Reconciliation outlining FGM's commitments, objectives, and actions in terms of collaboration with Indigenous communities for the same duration as the JEDI plan | Document created, adopted by the Board, and made accessible |
| 2. Keep the Land or Territorial Acknowledgement statement up-to-date and encourage meaningful land acknowledgment practice among staff, Board, and committee members | Use of land acknowledgment practices at major FGM events and meetings |

Human Resources

- **Ensure that the JEDI principles are included in FGM's recruitment and retention processes**

| Actions | Indicateurs |
|--|--|
| 1. Revise the selection criteria (lived experiences, lack of Quebec job experience, valuing skills over formal education and experience, etc.) | Updated selection criteria |
| 2. Write inclusive job descriptions | Inclusive writing |
| 3. Disseminate job offers on channels (networks, media) that reach a greater diversity of candidates | Diversity of channels used for diffusing job postings |
| 4. Disseminate and be transparent about salary ranges | Number of job postings that include information on salary conditions Internal transparency |
| 5. Implement intentional measures throughout the recruitment process | Approaches and measures tested Number of people who self-identify as members of historically marginalized groups or with non-standard employment backgrounds who secure employment (assessed in the anonymous employee survey) |
| 6. Create an inclusive onboarding guide | Integration guide created |
| 7. Implement intentional measures to retain and advance staff from historically marginalized populations, taking into account best practices in the sector | Average tenure of staff from historically marginalized communities compared to staff from historically privileged communities Number of employees from historically marginalized communities in management and leadership positions |

➤ **Maintain a workplace that values diversity and provides employees with equal opportunities for advancement within the organization**

| Actions | Indicators |
|---|--|
| 1. Integrate JEDI values when reviewing HR policies (employee handbook, complaint process, work-life balance policies) | Number and percentage of HR policies revised or newly developed |
| 2. Redefine the criteria for annual employee feedback sessions and make it a two-way process | Development of a new two-way evaluation document |
| 3. Co-develop an individual professional development plan for each employee and put in place the necessary supports (training, evolution of responsibilities, networking opportunities, etc.) | Every employee has a professional development plan |
| 4. Identify and integrate JEDI-related questions into the anonymous employee satisfaction survey | Response rate to JEDI-related questions in the employee satisfaction survey |
| 5. Capture information on equity indicators at all levels of organization (managers, volunteers, employees) | Portrait of diversity at all levels of the organization through anonymous self-identification |
| 6. Establish a clear process to manage JEDI issues at an individual level (complaint process, feedback, impact and/or learnings) | Development and adoption of a process for managing JEDI issues for FGM employees, management, and volunteers |
| 7. Ensure that workplace equipment and tools meet all types of needs | Level of employee satisfaction with workplace tools |

➤ **Foster the ongoing development of employees' knowledge and skills**

| Actions | Indicators |
|---|--|
| 1. Develop an annual training plan for the team based on JEDI priorities | Level of employee satisfaction with the training and activities offered as part of the training plan |
| 2. Promote vocational training and formal and informal co-learning (lunch-and-learns) | Number and types of activities carried out |

| | |
|---|--|
| 3. Provide employees with opportunities to deepen their knowledge outside of FGM and foster knowledge sharing within the team | Number of training courses completed outside FGM |
| 4. Provide training on inclusive management and JEDI principles to all members of management teams | Number, subject, and frequency of trainings attended by management |

Investments

➤ Implement a responsible investment policy

| Actions | Indicators |
|--|--|
| 1. Consider JEDI, the United Nations Global Compact on Human Rights, and the United Nations Declaration on the Rights of Indigenous Peoples (UNDRIP) when choosing investments | Success stories of investments that meet these criteria |
| 2. Request information on human rights and Indigenous rights, reconciliation, justice, equity, diversity, and inclusion as part of our investments | Percentage of data available on these criteria as a result of our requests |
| 3. Evaluate the investment management structure according to JEDI principles, with the goal of influencing the practices of the fund managers | Implementation of voting rights policy |

Philanthropic Development

- **Create and maintain relationships of trust with philanthropic leaders within FGM networks, prioritizing historically marginalized communities and the communities of the North and South Shores of Montreal**

| Actions | Indicators |
|--|--|
| 1. Discussions with representatives from priority communities and groups to better understand philanthropic practices of their communities and the challenges they face | Improved understanding within the philanthropic development team of issues specific to priority communities and groups |
| 2. Partner with recognized leaders within these communities and groups to develop our networks and reach in Greater Montreal, and develop trust-based relationships with regional Chambers of Commerce or those belonging to priority communities and groups | Diversity and quality of partnerships created (team appreciation) |
| 3. Diversify the membership of the Philanthropic Development Committee to ensure better representation of priority communities and groups | Representation within the committee, which reflects the diversity of the philanthropic community in Greater Montreal Leveraging the diverse skills of the committee members |

- **Increase the funds available to support JEDI objectives**

| Actions | Indicators |
|---|--|
| 1. Educate fund creators on the issues related to JEDI before, during, and after the creation of the fund | Evaluation of progress by the philanthropic development team |
| 2. Create cohorts of philanthropists who have an understanding of the JEDI issues pertaining to the allocation of funds | Fruitful discussions with fund creators on JEDI issues |
| 3. Encourage fund creators to contribute to existing FGM funds that focus specifically on JEDI issues | Fruitful discussions with fund creators on the reasons to contribute to the existing FGM funds |

- **Support individuals and organizations from priority communities and groups in the development of their philanthropic projects or activities**

| Actions | Indicators |
|---|--|
| 1. Adapting our service offering to the realities of individuals and organizations from priority communities and groups | Number of positive approaches and funds created by individuals and organizations from prioritized communities and groups |
| 2. Develop mechanisms to encourage participation in matching programs by organizations representing or serving prioritized communities and groups | Fruitful discussions and participation rates of these organizations |
| 3. Identify groups or networks to reach priority communities and groups and disseminate relevant information about matching programs | New partnerships, success stories, and lessons learned from accompanying these organizations |
| 4. Collaborate with trusted partners to support organizations' capacity building in philanthropic development | New partnerships, success stories, and lessons learned from accompanying these organizations |

Community Engagement

Grantmaking and Community Relations

- **Develop and strengthen relationships between FGM, organizations and networks that serve historically marginalized individuals and communities**

| Actions | Indicators |
|--|---|
| 1. Intentionally and proactively identify organizations that serve historically marginalized communities | Level of team member knowledge on the organizations representing the FGM's six priority communities |
| 2. Meet with and listen to representatives of historically marginalized communities and share information about FGM programs with them | Number of new organizations with which FGM has established contact, and number of organizations with which regular contact is maintained |
| 3. Improve the representation of historically marginalized populations identified by FGM on its Community Engagement Committee and Advisory Committees | Diverse composition of the Community Engagement Committee and Advisory Committees, based on identity or lived or acquired experience (age, gender, race, ethnicity, sexual orientation, functional limitations) |

- **Support community mobilization around common agenda and a shared vision of social transformation**

| Actions | Indicators |
|---|--|
| 1. Support collaboratives, grassroots mobilization, advocacy and other actions aimed at strengthening a community's capacity for action | Percentage and amount allocated to funding for grassroots and advocacy initiatives |
| 2. Develop the FGM's knowledge of the philanthropic priorities of other funders and facilitate the links between the communities and the funders to better and differently support the frontline work | Success stories of connecting communities and funders |
| 3. Support the production and dissemination of data and knowledge by and for historically marginalized communities | Number of participatory research initiatives and knowledge-sharing initiatives supported |

| | |
|---|--|
| 4. Consider systemic factors that limit access to philanthropic resources for historically marginalized communities | Number of FGM funds that explicitly address factors of systemic discrimination |
|---|--|

➤ **Strengthen reciprocal relations between FGM and its partners by progressively applying the principles of Trust-Based Philanthropy, according to our capacity**

| Actions | Indicators |
|--|--|
| 1. Prioritize a flexible approach that reduces barriers and administrative procedures and, where possible, provides mission-focused funding on a multi-year basis | Assessment of FGM's grant-making processes by organizations Number and percentage of multi-year grants disbursed for each fund |
| 2. Define the strategy and guidelines for distribution of the FGM's own funds, in collaboration with the concerned groups and communities and through an intersectional approach | Number of pre-consultations carried out for the Collective Funds and composition of the committees convened for the pre-consultations |
| 3. Offer support to organizations beyond funding through other types of accompaniment, such as information sharing and amplifying the work of partner organizations and groups | Assessment of the quality of the FGM's support by the recipient organizations Success stories and lessons learned in the process of working with the organization |
| 4. Decentralize decision-making power and strengthen participatory practices in the process of distributing FGM's own funds | Committee members' assessment of decision-making processes and participation |
| 5. Increase transparency in grant-making processes | Organizations' assessment of the transparency and quality of communications regarding funding distribution |
| 6. Experiment with new approaches and document learnings to improve our practices and share them with other stakeholders | Number of learning materials produced and shared by FGM |

- **Ensure that a minimum of 50% of grants awarded annually from FGM's own funds are awarded to organizations and initiatives that directly represent and serve historically marginalized communities**

| Actions | Indicators |
|---|---|
| 1. Develop and implement a fair, clear, and transparent grant distribution framework | Amount and percentage of grants distributed according to the distribution framework |
| 2. Consider the systemic barriers that organizations serving and representing historically marginalized communities face: chronic underfunding, understaffing, lack of charity registration status, language, etc. Take this into account when developing the FGM's granting parameters | Amount and percentage of grants awarded to organizations that are historically underfunded |
| 3. Promote the expertise of people representing historically marginalized communities on the FGM Community Engagement Committee and the Advisory Committees and create favourable conditions for sharing and collaboration | Appreciation of the decision-making processes, participation of, and support from the team by committee members |

Collaborations and Partnerships

- **Contribute to raising awareness of territorial, social, and environmental inequities through participation in and/or the creation of collaborative instances**

| Actions | Indicators |
|--|---|
| 1. Support the production and dissemination of data on social and environmental inequities in Greater Montreal while promoting the expertise of communities, stakeholders and people with lived experience of these issues | Success stories and lessons learned around producing and disseminating data equitably |
| 2. Use different FGM communication platforms and tools to support and amplify advocacy actions | Number of advocacy activities shared in FGM communications |
| 3. Use the FGM's own funds as a lever to promote consultation, sharing, and knowledge generation | <p>Number of exchange, co-learning, and networking events organized within the framework of FGM's collective funds</p> <p>Number and portrait of participants</p> |

- **Develop and deepen relationships between the FGM and groups representing historically marginalized communities by adopting a decolonial approach, i.e. by showing up with humility, prioritizing relationships, giving time, sharing power, paying attention to context**

| Actions | Indicators |
|--|------------|
| 1. Develop FGM's network of partners by participating in events and spaces dedicated to justice, equity, diversity, and inclusion and decolonization | |
| 2. Use FGM's influence to make the consultation and collaboration spaces where we are present more open, democratic, and equitable | |
| 3. Develop meaningful relationships with changemakers and emerging leaders from historically marginalized communities | |
| 4. Cultivate a learning organization within FGM, value and learn from the stories shared by partners | |

The indicators related to this objective are the same as those of the previous objective

Communications

External Communications

➤ Amplify the voices of priority populations identified in FGM's JEDI Action Plan

| Actions | Indicators |
|--|---|
| 1. Integrate a JEDI approach into our communications tools and strategies | Quality of the tools and satisfaction of the colleagues using them |
| 2. Incorporating JEDI issues into the Vital Signs projects | Presence of JEDI aspects in the Vital Signs development process and in its final production |
| 3. Referencing networks, platforms, and media outlets that reach the identified populations | Approaches made and quality of links created |
| 4. Take a public stand in support of the populations identified, at events and within the news media | Number of publications |

➤ Demonstrate FGM's commitment to JEDI

| Actions | Indicators |
|--|---|
| 1. Initiate and create links with media outlets serving identified populations | Approaches made and quality of links created |
| 2. Ensure the organization of inclusive, representative, and accessible events | Accounting for inclusion, representation, and accessibility criteria when organizing events |
| 3. Identify and share with the team events organized by the prioritized organizations and communities to facilitate the team's participation | Dissemination of the list of events and use/satisfaction by colleagues |
| 4. Relay knowledge around philanthropy to the leaders of the identified populations and present FGM's JEDI orientations and actions | Number and quality of links and communications created, relevance of shared knowledge |
| 5. Relay the knowledge and lived experiences of the identified populations | Number and quality of links and communications created, relevance of shared knowledge |

Glossary

Brave space

The concept of brave space (vs. safe space) comes from the observation that by prioritizing comfort in creating sharing and learning spaces, we may inadvertently exacerbate existing power dynamics and compromise combating inequities to avoid discomfort. Brave spaces are spaces where discomfort is expected and shared, where difficult conversations about injustice take place, and collective empowerment is built to advance social justice.

Decolonization and decolonial approach

Decolonization is a process of reflection, learning, and action that leads us to take a critical look at existing systems and recognize the validity and value of alternative ways of thinking and being.

FGM's decolonial approach to its grant-making practices is embodied in our teams demonstrating humility and humanity and by prioritizing interpersonal relationships. The approach also encourages an understanding of the different contexts, needs, and issues facing historically marginalized populations. It is an approach that promotes power-sharing.

Learning organization

As defined by Peter Senge in *The Fifth Discipline* (1990): “An organization in which people continually develop their capacity to produce the results they desire, where new and expansive ways of thinking are fostered, where collective aspiration is unleashed, and where people continually learn to learn together.”

Organizations that directly represent and/or serve historically marginalized communities

Includes organizations that:

- have a mandate to serve historically marginalized communities;
- offer programs and services adapted to the culture and needs of historically marginalized communities;
- rely on the leadership of people who identify themselves as members of historically marginalized communities (in terms of management, governance and other types of leadership clearly identified in the organization);
- support causes that have a positive impact on historically marginalized communities.

This definition has been adapted from the definitions proposed by The Foundation for Black Communities.

Trust-based philanthropy

Trust-based philanthropy is an approach to philanthropy that addresses the inherent power imbalances between funders, nonprofit organizations, and the communities they serve. At its

core, trust-based philanthropy is about redistributing power - systemically, organizationally and interpersonally - in the service of a healthier, more equitable nonprofit ecosystem.

Source: Community Foundations of Canada

Horizontal and participative management practices

Horizontal and participative management practices aim to break down an organization's hierarchical barriers, redistribute power, and value openness, respect, collaboration, and trust within teams. Horizontal management results in the creation of more inclusive workplaces.

Historically marginalized populations

Individuals, groups, and communities that have experienced and continue to experience marginalization. The Canadian Race Relations Foundation defines marginalization as the fact that people who do not belong to the dominant group face barriers that prevent them from participating fully and equitably in society.

The FGM has prioritized six historically marginalized populations in its community involvement: Black and racialized communities, Indigenous Peoples, women and girls, members of the LGBTQ2S+ communities, neurodivergent people, and people living with physical or intellectual limitations.

Social transformation

A process of intentional systemic change that addresses not only the symptoms but also the root causes of inequality, injustice, and an unsustainable society. It can take the form of:

- uniting complementary forces or organizations to multiply the potential for action, or to share a winning model or sharing knowledge that saves communities from having to reinvent the wheel;
- a potential to transform the status quo in favor of social and environmental justice;
- influence on more than one key element of the current system.

Timeline

- 2020: Collaboration between philanthropic actors to define historically marginalized populations and reflect on our philanthropic practices | *Data for Equity*.
- 2020: Creation of a JEDI Provisional Committee bringing together FGM administrators and employees.
- 2021: Drafting and adoption of the FGM's Land Acknowledgement.
- 2021: Drafting and integration of the JEDI statement into the FGM strategic plan.
- 2021: Adoption of trust-based philanthropy practices and commitment to provide a minimum of 50% of grants from FGM's own funds organizations serving historically marginalized populations.
- 2021: Participation in Philanthropic Foundations Canada's JEDI Accelerator.
- 2021 to 2023: Trainings and consultations of FGM staff for the drafting of the JEDI Action Plan.
- 2022: Participation of FGM staff and administrators in training on the realities facing Indigenous Peoples.
- 2022: Presentation of the first version of the JEDI Action Plan to the JEDI Committee.
- 2023: Second revision, discussions on appropriate language, realism of objectives, indicators of success.
- 2023: Drafting of a Roadmap towards Reconciliation, complementary to the JEDI Action Plan.
- September 2023: Adoption of the JEDI Action Plan and Roadmap towards Reconciliation by the Board of Directors.