Equity Analysis of Group Membership: A CLiP Template
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Background:

This Equity Analysis of Group Membership Template was developed by the Collaborative Leadership in Practice (CLiP)* project to strengthen collaborative and equitable leadership in the non-profit sector - specifically in the context of partnerships and networks. For more information and resources about CLiP, visit www.clip-lcp.org.

Purpose:

We developed this template to help you recognize and reflect with others on whether your organization, committees, partnerships and networks include people with a variety of lived experiences (e.g. different social locations, abilities and gender). Since identities, social locations and systems of oppression that form individuals' lived experiences also intersect, including people who experience intersectionality[1] can bring new perspectives to decision-making for your programs, policies and partnership initiatives.

Audience:

The people who may be interested in using this template include:

- Board members;
- Executive directors;
- Managers;
- Coordinators who are developing a research or program advisory group; and
- Members of a partnership.

How and when to use the template:

The Equity Analysis of Group Membership Template must be used as more than a checklist. For example, after reflecting and noting any observations about the composition of a group of people, ensure adequate time for reflective conversations and commit to actions that could lead to more equitable and inclusive relationships and partnerships. Since token representation from marginalized groups and communities will not shift structural power dynamics in a group, keep in mind the need to have several representatives from these groups to decenter power and ensure real collaborative dialogue and decision-making. This template should be:

- A process that supports reflective practice;

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[1] http://en.healthnexus.ca/sites/en.healthnexus.ca/files/resources/addressing_health_inequities_resource_guide_english.pdf (see page 8 under 'anti-racism/anti-oppression column')

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- An activity that highlights strengths and opportunities and leads to new action; and
- A reference point to support equity discussions in relation to anti-oppression frameworks.

You can use this template prior to and during the selection process for any group (e.g. to determine your outreach/networking/invitations). You can also consult it when evaluating the current situation of your group (e.g. to identify what perspectives are missing and what experiences should be prioritized in future recruitment).

The template is divided into two sections (individuals, organizations) to help identify how individuals' experiences/social location and organizations' areas of work/sector location may or may not intersect. The template is designed to support the following activities in relation to individuals and organizations within your (emerging or existing) group:

Individuals	Organizations
- To inform the recruitment of individuals who can represent different groups. - To determine the identity/social location/lived experience of individuals within the group.* **Important Note:** To respect safety for members of marginalized/stigmatized groups, never assume a person's identity, never disclose another person's identity, and never require a person to disclose.	- To identify an organizations' current areas of work (e.g. housing or education) - To recognize the different positioning (access to resources and decision-making power) of different organizations. - To highlight where organizations focus their efforts (e.g. individual, community, or policy level)

Tips for using the template:

- Hold an information session and training on equity, anti-oppression and other key frameworks if organization members are unclear on what these frameworks are and why they are important.
- Clarify definitions for the different categories in the template (e.g. what are the ages for child/youth in the individual section?) to ensure that everyone shares a common understanding.
- Remember that individuals can select multiple boxes since many people have intersecting identities and experiences (e.g. queer cis-gendered woman who is from a rural town and currently under-housed).
- Ensure that each individual has the option to not participate, or not disclose, with regards to their identity, since disclosure may put them at risk of future harm (oppression) within or beyond the current group context. As a strategy for managing safety, you can choose

to use the individual section to assess a combination of personal lived experience and/or work experience in the categories provided.

- Review policies and procedures of your organization to be sure that the process for recruiting people - including the use of this template - are clear, accessible and applied in practice.
- Use this template as a reference point for evaluative discussions; the individuals committed to using it should decide how often they will review it (e.g. once a year).
- Use this template alongside other tools such as the Health Equity Impact Assessment[2] tool to strengthen an equity and anti-oppression lens for program and policy development
- Observe any structural barriers that may prevent the use of this template and consider forming an equity committee, since organizational change is non-linear and multiple factors are required for conditions of equity and inclusion to improve.

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[2] https://www.porticonetwork.ca/web/heia

Equity Analysis of Group Membership Template

Equity Analysis of Group Membership: CLiP Template					
	ORGANIZATION NAMES				
INDIVIDUAL & ORGANIZATIONAL COMPOSITION					
Individuals					
Identity/Social location/Lived experience					
Caregiver					
Child/youth					
First generation immigrant					
Francophone					
Homeless/under-housed					
Indigenous					
Lesbian, gay, bisexual, transgender, queer, questioning and two-spirit (LGBTIQ2S)					
Low income					
People with disabilities					
Psych consumer/survivor					
Racialized					
Religious/faith communities					
Rural/remote					
Senior/Elder					
Survivor/victim of violence					
Unemployed/precarious employment					
Without post-secondary education					
Woman					
Organizations					
Areas of Work					
Anti-violence					
Childhood and youth development					
Disability services/rights					
Education					
Employment/labour					
Family services					
Food security					
Gender					
Health services					
Housing					
Immigrant services/rights					
Income/wealth distribution					
Indigenous services/rights					
Language services/rights					
LGBTIQ2S					
Mental health/addictions					
Peer support					
Physical environment/safety					
Race					
Rural development					
Social inclusion/exclusion					
Transportation					
Other_____					
Positioning (access to resources/decision-makers)					
Community representative					
Foundation/grantmaker					
Government					
Large non-profit					
Medium non-profit					
Private Sector					
Public agency (e.g. Public Health)					
Small non-profit					
Social enterprise					
Other _____					
Focus of Efforts					
Individual/interpersonal level					
Community/Organizational level					
Societal/Policy level					

An excel version of the template is available online at www.clip-lcp.org