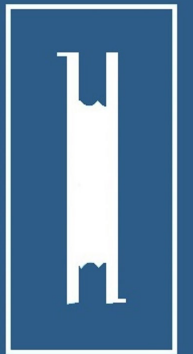


Phase 3: Strategy & Action Plan

Justice, Equity, Diversity & Inclusion (JEDI) for CSLA,
LACF and Component Associations

June 2022

CAPILLARY



LAND ACKNOWLEDGEMENT

We acknowledge that Capillary Consulting operates across Canada **on the traditional territory of First Nation, Inuit and Métis peoples from coast to coast to coast**. We acknowledge that the CSLA, LACF and component associations plan, design and work on lands that includes land and water routes that were created and used, both historically and presently, by Indigenous peoples.

Capillary's head office **is located in Mississauga, which is on the Treaty Lands and Territory of the Mississaugas of the Credit**. For thousands of years, Indigenous peoples inhabited and cared for this land, and continue to do so today. In particular we acknowledge the territory of the Anishinabek, Huron-Wendat, Haudenosaunee and Ojibway/Chippewa peoples; the land that is home to the Metis; and most recently, the territory of the Mississaugas of the Credit First Nation who are direct descendants of the Mississaugas of the Credit.

We are grateful for the **opportunity to create, collaborate, live and work here**. We support community efforts to sustain a relationship with Indigenous peoples based on respect, dignity, trust and cooperation, in the process of advancing truth and reconciliation.



The CSLA + LACF + Component Associations' JEDI Journey

01

The Story So Far

02

JEDI Achievements at CSLA

03

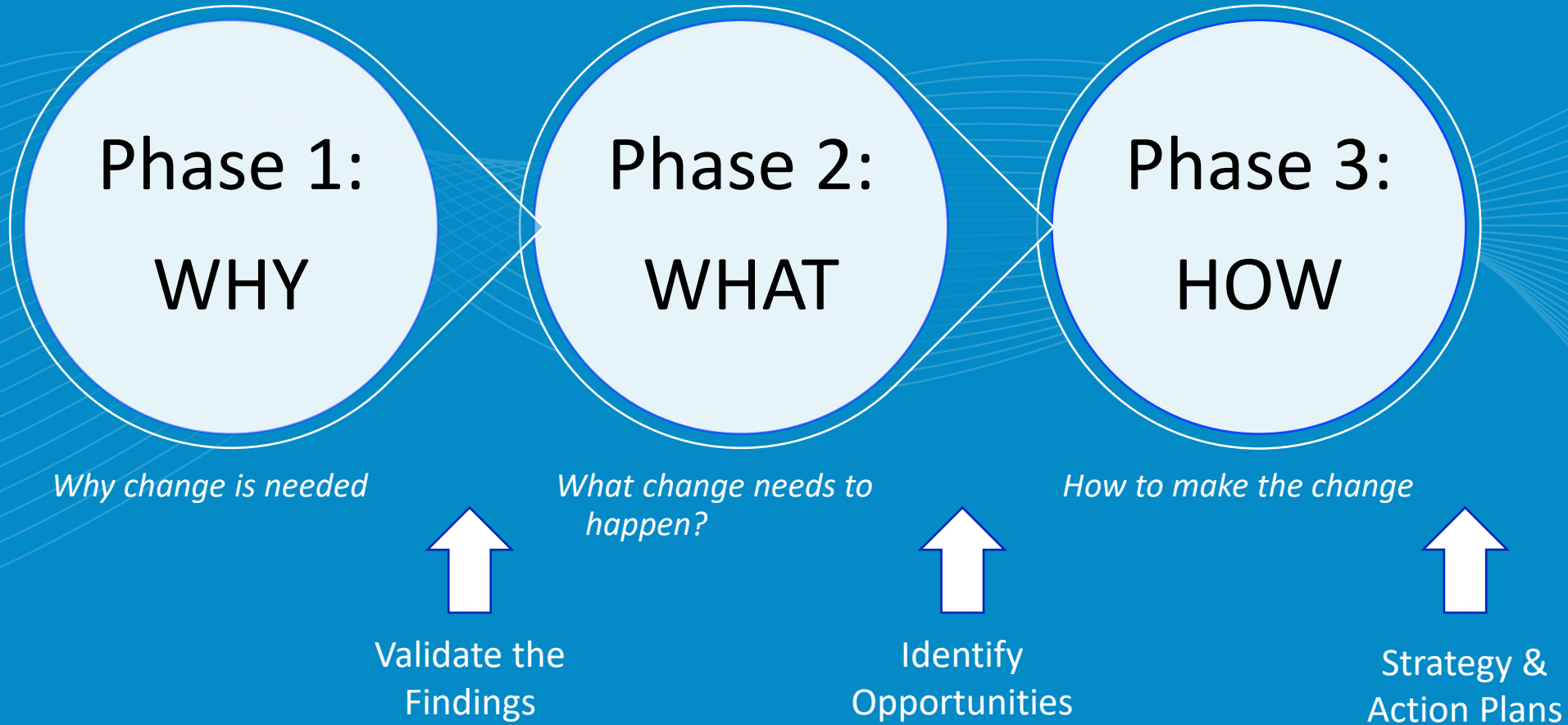
JEDI Strategy Roadmap

04

Action Plan



Capillary Timeline + JEDI Team



May 2020 - Present

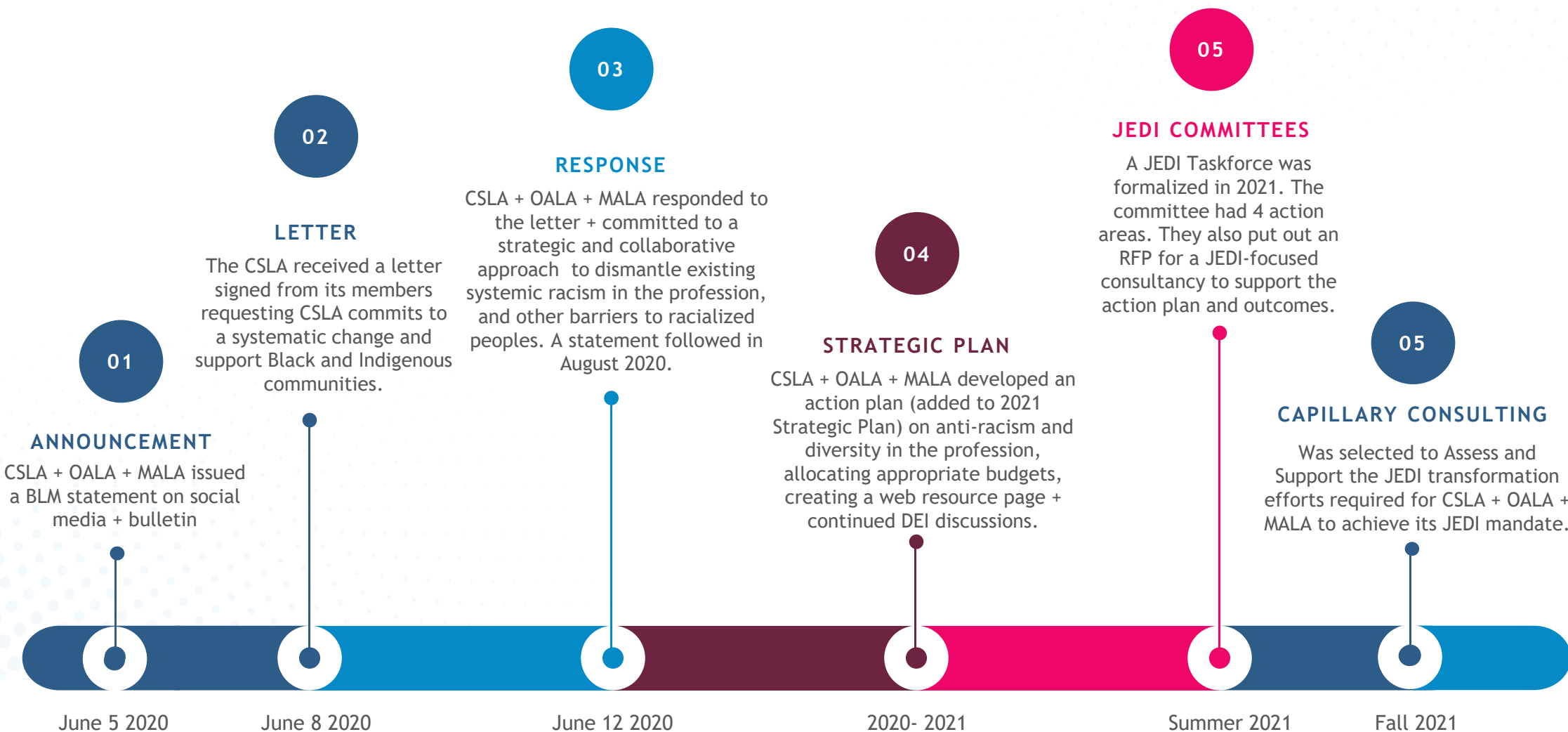
The Story so Far





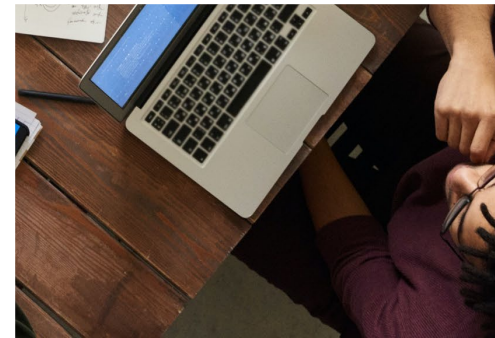
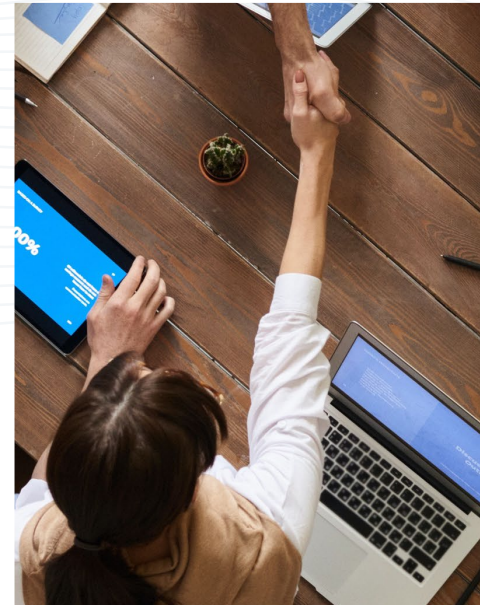
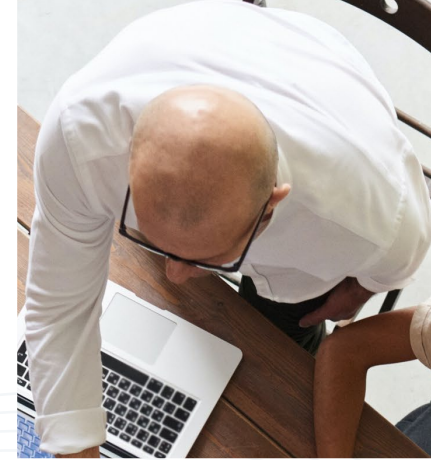
CSLA's Actions

Timeline



JEDI TEAM EFFORTS

- ❖ The CSLA + OALA + MALA JEDI Teams have invested their time, expertise and knowledge. This continued partnership and support with the Capillary Consulting team has contributed to the success of the CSLA + component associations' JEDI Initiative.
- ❖ Throughout each of the 3 Phases of this JEDI transformation and change enablement project, the JEDI teams and CSLA + OALA + MALA representatives have been committed to working with Capillary, advising, reviewing, and drafting as needed. Dozens of hours have taken place to ensure that activities are held, deliverables are met, feedback loops are closed, and time commitments are honoured.
- ❖ The success of this project and of future JEDI efforts are all made possible by the JEDI taskforce and committee members and all contributing CSLA members - and for that, we are all grateful.



Phase 1

Commitments:

- CSLA + LACF + component association exec meetings + interviews.
- JEDI Taskforce planning, document reviews, and validation + finding sessions (approx. 2x a month).
- Over 35 hours spent in rich conversation + insights.
- 14 focus groups (90 minutes).
- All Membership represented.
- Email communications.

Output: CSLA JEDI Analysis + 2 pager of findings for members.

Phase 2

Commitments:

- JEDI connecting Capillary to networks for best practice research.
- Continued involvement, interviews, and diving deeper into findings.
- Research into what has been done across CSLA + component association.
- Identifying themes and opportunities.
- Reviewing research documents.
- Validation of Key Opportunities.
- Meetings to determine long term goals and outcomes .

Output: Best Practice and Key Opportunities.

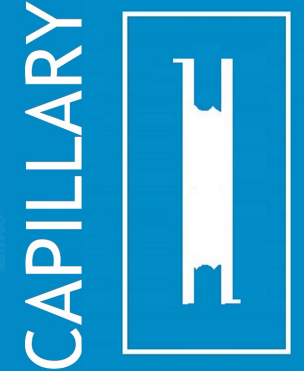
Phase 3

Commitments:

- Continued involvement, reviewing documents and validations session.
- CSLA + LACF Execs + JEDI committee + Taskforce continued to plan and review work.
- Determining immediate and long-term Key Opportunities.
- Reviewing high level strategy.
- Reviewing and validation rollout and action plan.

Output: High level rollout strategy + Action Plan





Fall 2021 - Present

Achievements of CSLA + LACF + Component Associations

The role of the CSLA + Component Associations + JEDI Taskforce + JEDI Committees on this transformation initiative

Contributions of JEDI Team and CSLA + LACF + Component Associations

Work with Capillary



Phase 1 - Discovery + Analysis

This phase identifies “**Why is change needed?**” and is the “**Why**” of the initiative. Usually consisting of discovery, analysis, and findings for the current state, and hopes for the future state.



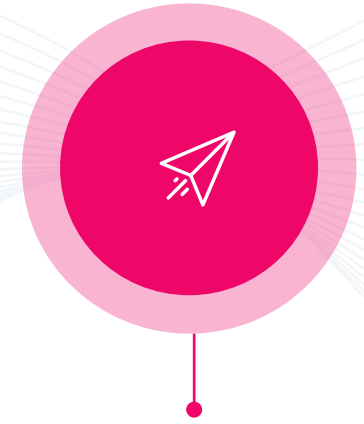
Phase 2 - Research and Design

This phase determines “**What change needs to happen?**” and is the “**what**”, the details of what needs to happen for change, what it means to change, and what is the best way for this change to occur.



Phase 3A - Development

This phase determines “**How to make the change?**” and this determines “**How**” we make the change happen. How do we transform the current state of CSLA + component associations into a strategic JEDI driven org.



Phase 3B - Strategy + Action Plan

This phase is also **part of the “How”**, and this is the more strategic and tactical portion of the change. This is where High level strategies are created, and action plans are developed.



Strategy Roadmap + Action Plan



Drilldown into Immediate 5 Steps

We understand that this is a massive undertaking as the CSLA + LACF + component associations transform to JEDI-driven organizations. We've identified 5 immediate actions that can make this happen, which you can see below.

01 Measurement and data

02 Acknowledgement + Communications

03 Formalizing JEDI Committee

04 Create JEDI Terms of Reference

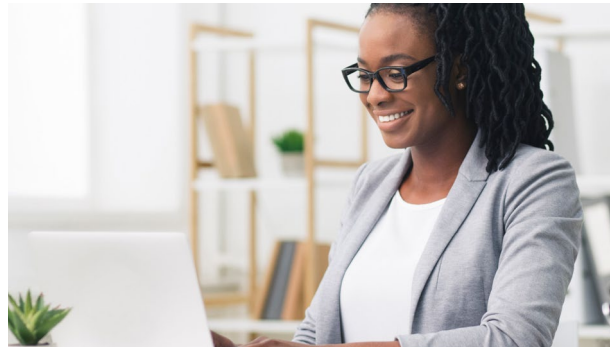
05 Training for JEDI Committee

Member Engagement

All Member Town Hall



Webinar Series



AGM Conversations



WHAT

- Communications that are CLEAR | CONSISTENT | CONCISE.
- Integrated Communications across CSLA + LACF + component association Channels + Mediums.

WHY

- Gives everyone in CSLA + component associations a glimpse into JEDI activities Since Jan 2022.
- Presents the CSLA JEDI's Strategic Roadmap to the larger CSLA + Component Membership.
- Encourages volunteer sign-up for the soon-to-be JEDI Committee.



Key Opportunity Areas

6 Opportunity Areas

Throughout our Phase 1 + 2 activities, and building upon the 4 Pillars of Action by the JEDI committee, we identified 6 key opportunity areas driving JEDI strategy in the CSLA:



1: RAISING PROFESSIONAL AWARENESS



4: ACCOUNTABILITY + METRICS



2: EXTERNAL STAKEHOLDER OUTREACH



5: BUILDING EQUITABLE PRACTICES



3: FOCUSED COMMUNITY INCLUSION



6: TOOLS + TRAINING

Quick Wins (Activate in the next 12 months)

12 in 12
months



1: RAISING PROFESSIONAL AWARENESS

Publications

Recognition Days



2: EXTERNAL STAKEHOLDER OUTREACH

Knowledge for Companies



3: FOCUSED COMMUNITY INCLUSION

BIPOC Folx

French Language



4: ACCOUNTABILITY + METRICS

Data Gathering

Establish Baselines

Create a Dashboard

Formalize JEDI Council



5: BUILDING EQUITABLE PRACTICES

Measure and Pivot



6: TOOLS + TRAINING

Training to Progress the JEDI Mission

Reward Success



Longer Term Initiatives (12 months+)



1: RAISING PROFESSIONAL AWARENESS

Educational Presence



2: EXTERNAL STAKEHOLDER OUTREACH

K-12

Universities

Second Careers



3: FOCUSED COMMUNITY INCLUSION

Respecting
Indigenous Space

Cross Canada Connects



4: ACCOUNTABILITY + METRICS

Keep on doing what you're doing



5: BUILDING EQUITABLE PRACTICES

Reduce Financial Blocks

Mentoring & Coaching

More Flexible Entry



6: TOOLS + TRAINING

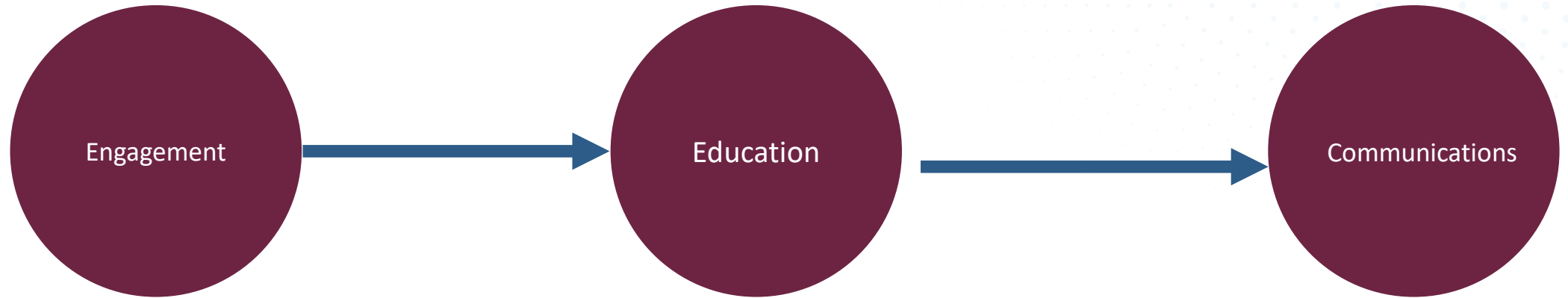
JEDI Training Linked to
Continued Education

Develop Playbooks

Member Connection



How can we implement the 3 Success Factors?



- Engagement is key to any sort of community or membership-based change and transformation effort.
- The success of the JEDI implementation needs a **shared vision and insights**.
- Continuing to **build the relationship** and engage the JEDI Committee and the CSLA +LACF + component association membership is crucial for success and will enable the Education + Communication pieces.
- Education refers to the portion of a transformation effort focused on **Knowledge, Skills, and Abilities**.
- **Training, mentoring, and coaching members** during any change effort will reduce their fears and increase the likelihood of adoption.
- **Gauging the ability** of your membership will help CSLA with training and communication needs. If members are afraid they don't have the ability to change, they won't.
- **Continuous communication and deep listening is crucial** - it takes 5-7 times for a message to be absorbed and understood.
- Communicating with courageous dialogue as it **answers questions, removes fears of the unknown, and gives members a forum for discussion and clarification**.
- Open Communication and **clear feedback loops** are create the 'stickiness factor' for the sustainability of the change.

Next Steps Immediate Actions



Hub + Spoke Model

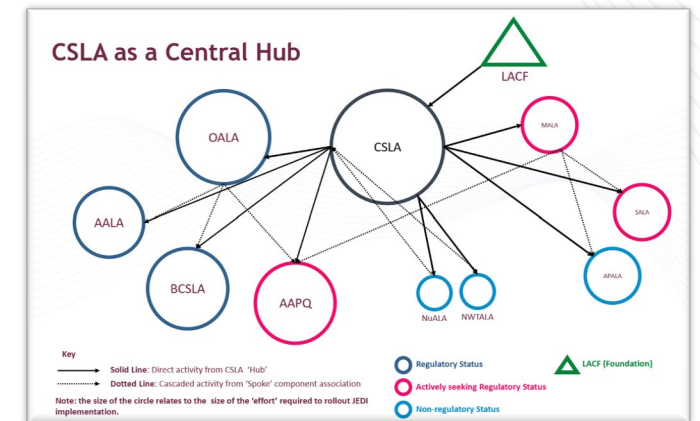
What is a Hub + Spoke Model?

The deployment of the Action Plan is based on a 'Hub and Spoke' Model, where the CSLA will act as a Central Hub, with component associations acting as spokes within the network. **This model is a support network for each other, and not a hierarchy.** Some component associations will be the first to trial and launch an activity or initiative, and then cascade their framework and action plan to other component associations (spokes) of similar size and membership as a template to build upon.

CSLA will be connecting and coordinating for the deployment of the JEDI strategy, with noted caveats. For example, the CSLA and component associations have different responsibilities, e.g. licensing. Please note that the size of the circles representing the different component associations is focused on the size of the effort required to roll out the deployment of the JEDI implementation.

Cascading and phased deployment:

- **1st Phase:** CSLA will Launch, Review, and Edit the actions (including the creation of a JEDI CSLA committee JEDI strategy, and Action Plan. It then passes the action plans to one Macro (OALA) and one Meso (MALA) organization. NuALA + NWTALA to be consulted as components with the most information, knowledge + practice with regards to the Indigenous relations.
- **2nd Phase:** OALA and MALA will test, learn, and scale the initiatives, and share findings to other similar sized organizations.
- **1st + 2nd Phase:** Micro organizations will benefit from the above Strategy and Action Planning and will work directly with the CSLA Hub to determine how best to use it for their component association members.



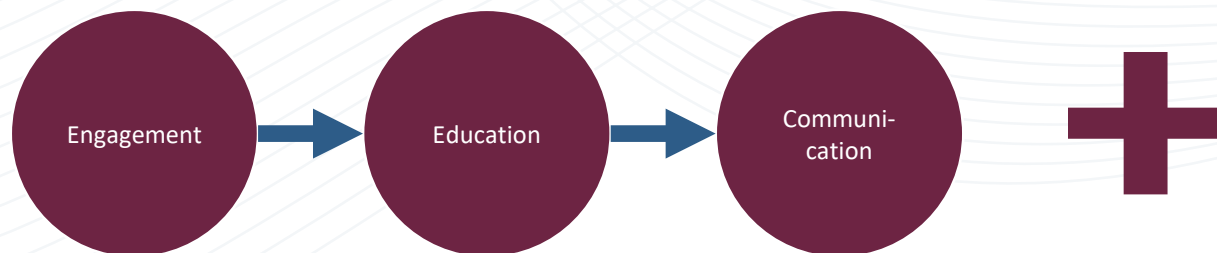
5 Immediate Steps Action Plan



Immediate Steps of Action

Capillary Consulting can continue to be engaged to support and facilitate some of the immediate steps of actions that are required to rollout the JEDI strategy and action plan for CSLA, LACF, and component associations. Throughout the action plan, we will highlight where our role would be mostly needed, and where Capillary can provide maximum impact and value.

3 Factors for Success



Continued Capillary Support



What are immediate actions we can take to make this happen? In Order...

01 - Measurement and data


02 - Acknowledgement + Communications

05 - Training for JEDI Committee

03 - Formalizing JEDI Committee

04 - Create JEDI Terms of Reference

01: Measurement + Data

Key Opportunity Area	What	How	Who (accountable)	Resources	Variation for Macro - Meso - Micro
<p>4: Accountability + Metrics</p>	<p>This is important for Evidence-based decision making. It helps the CSLA, LACF and component associations move away from assumptions. Having consistent record keeping. Measurement and Data provides the accountability through metrics that can help CSLA clearly identify and breakdown systemic barriers to full inclusion. The data will equip leaders with the information necessary to make the decisions for change. It also ensures that leaders and managers are monitoring their diversity target and are held accountable for the results.</p>	<ul style="list-style-type: none"> • Having meaningful measurements: SMART realistic measurements and targets. • Published Annual DEI Report. • Capturing JEDI Data points in annual survey. • Bring a data analytics and research intern. • CSLA's privacy policy may require a review + update. • Capturing data in English + French. 	<ul style="list-style-type: none"> • CSLA Staff. • JEDI Committee. • External Consulting Support. 	 <ul style="list-style-type: none"> • Management Info Technology to collect, capture and process data. • Create data and privacy policy. • Consultant Support may be utilized for oversight. • Data analyst Intern. 	<ul style="list-style-type: none"> • Data Input from every component association. • Partnership between components and CSLA re membership data - e.g. annual licence update could include new data point collections + a section on how data will be used. • Before collecting Data - personal vs organizational data, CSLA would like to know the differences in data requirements regionally and nationally. • Exploring whether the accredited Universities feeding profession MLA's would have some metrics.




02 – Acknowledgement + Communications


Key Opportunity Area	What	How	Who (accountable)	Resources	Variation for Macro - Meso - Micro
2: EXTERNAL STAKEHOLDER OUTREACH 3: FOCUSED COMMUNITY INCLUSION	Respecting Indigenous Spaces is crucial for the Justice element of JEDI and is an overdue activity. Acknowledgement - First things first, we must formalize the First Nations acknowledgement that.	<ul style="list-style-type: none"> Formalize CSLA + LACF Land Acknowledgement. Engage indigenous and other marginalized communities. Respectfully partner and take guidance from the Canadian Council of Chiefs + leaders within BIPOC communities. Engage the Reconciliation Advisory Committee. Engage existing indigenous knowledge keepers and elders. 	<ul style="list-style-type: none"> The Reconciliation Advisory Committee. OALA and MALA to support RAC. CSLA Staff. JEDI Committee. 	<ul style="list-style-type: none"> Creation of a digital presence for the Justice, reconciliation, acknowledgement, and anti-colonial reports and records. Intern to collect and keep track of data. Budget for hiring a Knowledge Keeper. 	<ul style="list-style-type: none"> Activity based on indigenous, Inuit, Métis and First Nations populations within the province and Territory of component association. NuALA + NWTALA to be consulted as components with the most information, knowledge + practice with regards to the Indigenous relations.
	A need to connect and engage WITH the community during a design and implementation of said community space. Creating trust and transparency through engagement with local communities particularly racialized, indigenous, and lower incomes communities.	<ul style="list-style-type: none"> Designing WITH the community through public consultations. Using inclusive language. Be culturally sensitive and aware. Education of LA firms. Listening spaces and opportunities for the voices of lived experiences. 	<ul style="list-style-type: none"> Create a taskforce for the creation of an Indigenous community playbook. The Reconciliation Advisory Committee. CSLA Staff. JEDI Committee. LA Firms (integrate these into their client engagement activities) 	<ul style="list-style-type: none"> Build a Community Playbook. Hire Intern. ASLA . 	<ul style="list-style-type: none"> CSLA to pilot the framework. Component associations will take on relevant local aspects.




03 – Formalizing JEDI Committee

Key Opportunity Area	What	How	Who (accountable)	Resources	Variation for Macro - Meso - Micro
<p>4: ACCOUNTABILITY + METRICS</p>	<p>The JEDI taskforce must be formalized into a permanent JEDI committee.</p>	<ul style="list-style-type: none"> • One CSLA committee with representation of all components and local committees. • The CSLA has a formal process to form a committee. This could be done within 60 days, give or take. • Ideally, each component association has a representative on JEDI Committee. • Explicitly discuss the Component associations' roles for JEDI. • OALA already has a JEDI taskforce, that will require becoming a committee. • MALA already has a DEI Committee. 	<ul style="list-style-type: none"> • CSLA Board. • CSLA Staff. • Representatives from all component associations. 	 <ul style="list-style-type: none"> • CSLA Committee Policies + Practices 	<ul style="list-style-type: none"> • CSLA to pilot the framework. One CSLA committee with representation of all components and local committees. • Component associations will take on relevant aspects and local governance parts. • Components to have their own committee with a national committee + provincial working to reduce silos and share knowledge. • Anything that happens at the component level should be reported on nationally to share all those successes and for one source of information!

04 - Create JEDI Terms of Reference

Key Opportunity Area	What	How	Who (accountable)	Resources	Variation for Macro - Meso - Micro
<p>4: ACCOUNTABILITY + METRICS</p>	<ul style="list-style-type: none"> CSLA JEDI Committee will have to create Terms of References, based on the overarching JEDI strategy. 	<ul style="list-style-type: none"> Create process for identifying members from the national landscape. Series of facilitated sessions to define Terms of References, accountabilities, term limits, and strategic action items. Determine Committee meeting cadence and attendance policies... governance items. 	<ul style="list-style-type: none"> Committee Chair (to confirm with CSLA) CSLA Staff. Member representatives from all component associations. 	 <ul style="list-style-type: none"> CSLA Committee Policies + Practices. Shared DEI Resource across component associations. 	<ul style="list-style-type: none"> CSLA to create the JEDI governance. Component associations will actively participate in the creation. Should a local need arise for a JEDI terms of reference, can mirror this approach. OALA, MALA and BCSLA all have committees in place. The terms of reference for the CSLA committee should address integrated work.

05 - Training for JEDI Committee

Key Opportunity Area	What	How	Who (accountable)	Resources	Variation for Macro - Meso - Micro
<p>4: ACCOUNTABILITY + METRICS</p>	<ul style="list-style-type: none"> • Immediate JEDI training, Awareness. • Knowledge. • Transfer of knowledge. • Training on the JEDI Committee's governance and accountability. 	<ul style="list-style-type: none"> • Create a Learning Journey for JEDI Committee. • A hybrid style of learning - self-directed, live learning, and webinars. 	<ul style="list-style-type: none"> • Committee Chair (to confirm with CSLA). • CSLA Staff. 	 <ul style="list-style-type: none"> • Consultants can conduct a JEDI training course for the new JEDI Committee, or other online platforms that offer this training. • Learning Management System. • In-person + interactive engagement. • Create a Resource Library. 	<ul style="list-style-type: none"> • CSLA Committee will create this. • This becomes the model for component associations' JEDI Training.

Starting Activity for CSLA

JEDI COMMITTEE CREATION AND PURPOSE

1. Create JEDI Committee representing all component associations.
2. Facilitated Terms of Reference.
3. Education.
4. Accountability defined.

DATA

1. Recruit Data Science Intern.
2. Add Data & Information management goals.
3. Create meaningful measuring approaches.
4. Create annual survey for DEI data points.
5. Add meaningful data points to membership record keeping.

ACKNOWLEDGEMENT & COMMUNICATIONS

1. Task force to create playbook for community engagement.
2. Reactivate the Reconciliation Advisory Committee.
3. Create communication plan for the activities (including data capture and annual reporting).

Starting Activity for OALA & MALA

JEDI COMMITTEE CREATION AND PURPOSE

1. Education for existing JEDI Task Force members.
2. Prepare for Committee creation in OALA/MALA.

DATA

1. OALA/MALA create meaningful measures.
2. Add DEI criteria to membership data capture.

ACKNOWLEDGEMENT & COMMUNICATIONS

1. OALA/MALA begin encouragement of acknowledgement practice.
2. MALA continues to support Reconciliation Advisory Committee.

OTHER ASPECTS

1. OALA to acknowledge the recognition of education in JEDI for professional hours and CEU's.
2. MALA to collaborate with smaller component associations on capacity setting for JEDI time to build appropriate strategies.



Starting Activity for remaining component Associations

Large

1. Find JEDI committee members and begin committee creation processes.
2. Provide education for members.

All Others

1. Add criteria to membership data capture.
2. Begin encouragement of acknowledgement practice.

