



Defining SMEs Success in DEI: What Small Steps Matter?

CASE STUDY RESEARCH



Executive Summary

Why this Case Study Research?

In recent years, the concept of Diversity, Equity, and Inclusion (DEI) has gained widespread attention, emphasizing the need for effective implementation. This case study research is dedicated to exploring and implementing practical strategies that go beyond mere buzzwords, transforming DEI into concrete, actionable steps. The IGC project seeks to empower women and gender-diverse people within thriving sectors by identifying and recommending practical strategies. Through our findings, we provide valuable insights on seamlessly integrating DEI initiatives into the fabric of Small and Medium Enterprises (SMEs).

Who Did We Talk to?

We engaged in interviews with seven feminist trailblazers, representing both nonprofits and SMEs, to gather insights on gender equity and DEI. These discussions informed our understanding of challenges within small and medium-sized enterprises (SMEs) and guided the development of key themes and individual case studies.

General Findings/What's Next?

Our findings offer actionable steps for SMEs to promote diversity, equity, and inclusion (DEI) in the workplace. Suggestions include building trust through representation, transparent policies, and integration of DEI into company values. We recommend integrating DEI into company values, measuring progress through clear metrics, addressing unconscious bias through education, and taking a holistic approach to organizational change from both top-down and bottom-up perspectives.



Supported by
RBC Foundation

In Good Company is a collective of: Canadian Women's Foundation, Catalyst Canada, Plan International Canada and YWCA Canada. Funded by RBC Foundation, IGC envisions a world where diverse women and gender-diverse people can lead in any field and experience a positive environment, free of harassment, and supported in their livelihood goals and career aspirations.

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Acknowledgements

ASBB expresses our deep appreciation to the members of the Community Leadership Group (CLG) for their visionary contributions to reshaping Canadian SMEs. Your dedication to driving inclusive change is an inspiration.

This statement recognizes and pays tribute to resilient women and gender-diverse individuals for their innovative efforts in overcoming challenges. The report explores key themes through case studies, highlighting their collective contributions to fostering diversity, equity, and inclusion in SMEs. ASBB expresses appreciation, hoping the report stands as a tribute to their unwavering commitment.

ASBB also extends our sincere thanks to Samatha Blostein of Research for Change and Fayza Abdallaoui of Next Level Impact Consulting for their invaluable research guidance and strategic direction in contributing to this project.

We hope this report will be a catalyst for change and bring forward a modern, feminist-aligned roadmap for a brighter and more equitable future for Canadian SMEs.



1.0 Why this case study research?



What is the Background and Context of this study?

In Good Company is at the forefront of championing a new era of leadership, highlighting the innovative work of the Community Leadership Group (CLG) – a collective of trailblazing SME (Small and Medium-sized Enterprises) leaders and non-profits from across Canada who are positively paving the way for inclusive change in terms of DEI. Our research spotlights their journey and identifies key opportunities and steps as examples for creating inclusive work environments and leadership avenues for women and gender-diverse individuals.

Beyond showcasing SME leaders, our study delves into the experiences of nonprofit organizations, pivotal figures in the forefront of Diversity, Equity, and Inclusion (DEI) advocacy. By encompassing both organizations and individuals in our research, our aim is to provide insights applicable to a broad spectrum, benefiting larger organizations as well as individually owned SMEs.

This research is a progressive exploration into overcoming challenges like **resistance to change, outdated policies, and tokenism**. The goal of the IGC project is to empower women and gender-diverse people in thriving industries like technology, engineering, and skilled trades, sectors where their voices and contributions have been largely unrecognized.

This report presents key themes and a set of case studies that provide a window into the current opportunities and challenges for DEI in the workplace for women-led SMEs.

By exploring the journeys of both SMEs and nonprofit organizations, this report serves as a contemporary, feminist-aligned blueprint for driving actionable change in Canadian SMEs.

2.0 What's the Current State of DEI in SMEs?



What's the Current Context of DEI in the SMEs Workplace ?

Gender Wage Gap Persists but Narrows

The Gender wage gap in Canada still exists in 2023 despite seeing a reduction from 16% in 2007 to 12% in 2022 among paid workers aged 20 to 54, according to the Labour Force Survey in Statistics Canada¹. **The narrowing gap is attributed to advancements in women's educational qualifications, with a higher proportion of Canadian-born and immigrant women holding bachelor's degrees compared to men.** In 2022, Canadian-born women with a bachelor's degree constituted 41%, while men accounted for 27%. Immigrant women who landed as adults and as children showed even higher proportions at 59% and 49%, respectively. Despite progress, disparities persist, with larger gender wage gaps among full-time workers, Indigenous women, and those with children. In comparison, smaller gaps exist for individuals without children or those not in a couple. Additional influencing factors include collective bargaining agreements and the sector of employment.

Current DEI Concerns:

- **Economic Uncertainty's Impact on DEI Investments:** Canada is facing a period of economic uncertainty due to high inflationary pressures coupled with high interest rates². Hence, small and medium-sized enterprises (SMEs) are confronted with a range of financial limitations amidst subdued forecasts for consumer demand³ and higher borrowing costs. As a result, there is a risk that discretionary spending in areas like DEI may be reduced for SME's. McKinsey & Company⁴ emphasizes that during times of economic uncertainty or budget constraints, organizations, including SMEs, may be inclined to cut costs, and diversity-related programs might

¹ Statistics Canada, "Women in the labor market: Increased potential, pay, and participation", October 27th, 2023. Web: <https://www.statcan.gc.ca/01/en/plus/4823-women-labour-market-increased-potential-pay-and-participation>

² Deloitte Canada, "Weathering a freeze before that", Economic Outlook, January 2024. Web: <chrome-extension://efaidnbnmnnibpcajpcglclefindmkaj/https://www2.deloitte.com/content/dam/Deloitte/ca/Documents/finance/ca-economic-outlook-january-2024-report-aoda-en.pdf?icid=eo-report-january-2024-aoda-en#:~:text=After%20gaining%20just%200.1%25%20in,and%20remain%20strong%20through%202025.>

³ Ibid 2.

⁴ McKinsey & Company, "The case for inclusive growth. by André Dua, JP Julien, Mike Kerlin, Jonathan Law, Brenden McKinney, Nick Noel, and Shelley Stewart III", 2021. Web: <https://www.mckinsey.com/-/media/mckinsey/industries/public%20and%20social%20sector/our%20insights/the%20case%20for%20inclusive%20growth/the-case-for-inclusive-growth-web-final.pdf>

be perceived as non-essential expenditures⁵. This reduction in investment not only fosters a lack of awareness about diversity issues within organizations but also hampers efforts to attract a diverse talent pool.

- **Labour Shortage emphasizes DEI call for action:** Despite the ongoing mild recession, Canada continues to experience a critical labor market shortage, primarily attributed to the impending retirement of the baby boomer generation, which represents the largest cohort of the labor force, by 2030. According to an article in the Globe and Mail, there were at least 700,000 unfilled jobs in the country, most notably in food services, health care, social services and construction⁶ industries. Combined with severe labor shortages⁷ faced by SMEs in the post-COVID context, a diminished commitment to Diversity, Equity, and Inclusion (DEI), or reductions in DEI funding, could further exacerbate talent acquisition challenges for these businesses. In light of these factors, it is essential for SMEs to explore sustainable methods of integrating DEI practices. Doing so is not only a matter of social responsibility but also a strategic imperative for their continued success and ability to meet business demands in the future.
- **Resources and Infrastructure:** According to a BDC article, SMEs employ nearly 88% of the Canadian workforce⁸. SMEs represent the sector most significantly impacted by labor challenges, including shortages, difficulties in sourcing suitable talent, and capacity issues that hinder their ability to meet existing demand. Despite these challenges, DEI initiatives often become the first areas to experience cutbacks during periods of economic uncertainty and budget constraints⁹. Prioritizing DEI while addressing labour force challenges and budget restrictions is proving difficult for Canadian SMEs.

Read a more comprehensive report on Canada's DEI landscape [here](#).

⁵ McKinsey & Company, "The case for inclusive growth. by André Dua, JP Julien, Mike Kerlin, Jonathan Law, Brenden McKinney, Nick Noel, and Shelley Stewart III", 2021. Web: <https://www.mckinsey.com/~/media/mckinsey/industries/public%20and%20social%20sector/our%20insights/the%20case%20for%20inclusive%20growth/the-case-for-inclusive-growth-we-b-final.pdf>

⁶Globe and Mail, "How the baby boomer exodus will imbalance the Canadian workplace", 2023.

⁷ INSTITUT C.D. HOWE, "Empty Seats: Why Labour Shortages Plague Small and Medium-Sized Businesses and What to Do About It," November 21, 2023. Web: <https://docs.google.com/document/d/1DTrYbWD5VBQHWm27O3ZEcQM3qzZ3jeXqU8niGB2ItMY/edit>

⁸ Business Development Canada (BDC), "10 things you (probably) didn't know about Canadian small business", 2023.

Web: <https://www.bdc.ca/en/articles-tools/business-strategy-planning/manage-business/10-things-didnt-know-canadian-sme#:~:text=Accounting%20for%2099.8%25%20of%20businesses,is%20vital%20to%20Canada's%20prosperity.>

⁹ Globe and Mail, "In a recession, DEI programs are often the first to go. Are businesses prepared for the consequences?", 2023. Web: <https://www.theglobeandmail.com/business/article-in-a-recession-dei-programs-are-often-the-first-to-go-are-businesses/>

3.0 What are the gaps and opportunities for DEI in Canadian SMEs?



STRENGTHS



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- DEI policies are now strategically important within organizations, necessitating comprehensive approaches.
- Businesses increasingly acknowledge DEI's significance in creating inclusive, thriving cultures.
- Programs like the Canadian Centre for Diversity and Inclusion and the Government of Canada's Supplier Diversity Program have advanced DEI.
- Emerging DEI strategies include mentorship, unconscious bias training, and inclusive language policies.
- The technology and finance sectors, and initiatives like the Skilled Trades College of Canada, have made notable DEI advances.
- Public attitudes towards DEI in Canada are increasingly positive, though challenges remain.



WEAKNESSES

- Structural accountability in DEI metrics is a concern, with marginalized groups possibly feeling unsafe in surveys.
- There's a lack of benchmarks and knowledge sharing about grants and funding for DEI.
- Absence of a comprehensive DEI implementation guide presents tactical challenges.
- Financial constraints are impeding DEI initiatives in light of the recent recession.



OPPORTUNITIES

- Legislation promoting workplace diversity and inclusivity (e.g., AODA, Employment Equity Act) offers a framework for progress.
- Linking financial incentives to DEI results can motivate organizations.
- Transparent reporting and evaluation of DEI efforts ensure accountability.
- Giving people a voice in decision-making, especially in publicly funded sectors, enhances inclusivity.
- Increasing visible representation across various roles encourages diversity.
- Recent trends include targeted recruitment, diversity training, inclusive policies, addressing pay equity gaps, and dismantling systemic barriers.

THREATS

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- Lack of representation and voices from SMEs in DEI discussions.
- Discrimination and bias influence perceptions of ideal business models.
- Absence of standardized DEI measurement criteria.
- Resistance to vulnerability and openness in sharing DEI outcomes.
- Rural areas face challenges in becoming more inclusive.
- Devaluation of women's work in key sectors due to inadequate investment.
- Backlash or regression in DEI is more pronounced in certain industries.
- Lack of a bottom-to-top approach in DEI initiatives limits effectiveness.
- Insufficient training for managers to achieve DEI goals.

4.0 How did we engage?



How did we engage?

The case studies involved interviews with seven feminist trailblazers, providing valuable perspectives on gender equity and Diversity, Equity, and Inclusion (DEI). The contextual analysis guided the development of Sections 5 and 6, which present key themes and individual case studies. This process offered insights into existing gaps, opportunities, and actionable strategies for DEI within Canadian SMEs, aiming to foster a more inclusive workplace.

The case studies detailed decisions and actions taken to address challenges, showcasing examples such as the implementation of new policies, initiatives related to hiring, and advocacy efforts, leveraging each individual and organization's unique strengths. The success stories provided a set of practical recommendations for implementing manageable yet effective steps tailored to Canadian SMEs.

Who did we talk to?

Female Owned SMEs

- Shauna Rae (Radar Media)
- Ritu Kholi-Sethi (Greater Toronto Executive Centre)
- Kristine Beese (Untangle Money)

Nonprofit Organizations

- Plan International Canada
- Catalyst Canada
- Canadian Women's Foundation
- YWCA Canada

5.0 What did we hear?



What did we hear? | Insights for DEI in SME Workplaces

We have synthesized key insights from the individual case studies into six key themes, including:

- 01 Trust as first element of change
- 02 DEI integrated into organizational values
- 03 An urgent need to measure DEI efforts formally
- 04 Being aware of unconscious bias in decision-making
- 05 Bottoms Up and Top Down approach to change
- 06 Balancing the unique needs of gender diversity

In Good Company (IGC) has a goal of advancing gender equity in the workplace. To understand the lived experiences of women in the workplace we interviewed eight women working in different male-dominated fields. We had conversations with the partners of IGC who work at national and international organizations focused on advancing rights for women and gender-diverse individuals: Canadian Women's Foundation, Catalyst, Plan International Canada, and YWCA Canada. We also interviewed women working in SMEs who have joined a group of entrepreneurs created by IGC to learn about Diversity, Equity, and Inclusion.

To empower Canadian SMEs with practical steps for making Diversity, Equity, and Inclusion (DEI) a realistic priority, this report presents insights from the one-on-one interviews. These discussions are arranged into key themes to highlight the important aspects of operationalizing DEI.

01. Trust as the first element of change

Building workplace trust is the initial step toward positive organizational change.

02. DEI integrated into organizational values

Fostering a commitment to Diversity, Equity, and Inclusion (DEI) requires impactful changes at the organizational level. This includes implementing structural shifts in hiring and retention practices, embedding DEI into daily lived values, and ensuring transparent decision-making through ongoing policy reviews. Walking the talk to make DEI an integral part of an organization's DNA is key.

03. An urgent need to measure DEI efforts formally

Transparent decision-making in DEI hinges on proper measurement. This involves setting transparent metrics and conducting objective research on workplace practices. Accountability and measurement was highlighted for driving positive change in the workplace, even if it requires more time.



04. Being aware of unconscious bias in decision-making

Unchecked unconscious bias in the absence of formal HR policies can persist. SMEs recognize the need for targeted interventions, including training, measurement, awareness, and unbiased career recognition systems, to stop unconscious bias despite capacity constraints. Addressing unconscious bias was highlighted as part of promoting fairness in the workplace.

05. Bottoms up and Top Down approach to change

Sustainable DEI implementation requires change from both leaders (top-down) and movements from the grassroots level (bottom-up). Participants highlighted collaboration at both levels for achievable and lasting change.

06. Balancing the unique needs of gender diversity

Creating a work environment that enables women to find fulfillment in both their personal and professional lives is crucial for cultivating more women leaders. Participants indicated that workplaces that advocate for women's employment but lack the structural opportunities for women to thrive in both aspects risk falling into tokenism.

1 | Trust as the First Element of Change

Building workplace trust is the initial step toward positive organizational change

Trust emerged as a central theme in interviews, playing a crucial role in engaging underrepresented communities for targeted programs. Successfully recruiting and hiring from such groups offer trust through representation for organizations. Honest, transparent, and safe conversations also build trust within teams and organizations. Participants highlighted the importance of building trust through effective communication such as transparent policies, accepting feedback without fear of repercussions, and establishing an environment that creates the safety to foster those conversations.

Another point of discussion involved the potential for increased trust through a more representative senior leadership. The perceived lack of comprehension from non-diverse leadership hinders the creation of an environment conducive to trust-building, implying that diverse leaders could cultivate greater trust and appreciation for diverse perspectives. This concept is reinforced by Lily Zheng in their book "DEI Deconstructed," where they highlight that stronger trust enhances the effectiveness of Diversity, Equity, and Inclusion (DEI) initiatives.

Key Elements:

- **Fostering honest conversations and feedback**
- **Meaningful understanding and listening as a way to create change**
- **Representative Leadership being key to building trust**

Participant Quotes

"If the CEO and a group of employees had an anonymous, code-based session where candid and pointed questions were asked, it could provide crucial feedback for HR. This direct input about individuals in leadership positions, especially those at the right hand of the CEO, would be invaluable for the CEO to hear."

"I think representation and trust are deeply connected to each other. Having representation helps foster understanding and trust between an organization and the communities it serves."

"We have funded organizations in the territories serving women and gender diverse folks, always for years and years and years. But when we would put out a call for proposals. Who would we get proposals back from? some white led organizations in the north and very few almost none, community grounded organizations, led by the population that we were hoping to reach."

2 | DEI Integrated Into Organizational Values

Fostering a commitment to Diversity, Equity, and Inclusion (DEI) requires impactful changes at the organizational level. This includes implementing structural shifts in hiring and retention practices, embedding DEI into daily lived values, and ensuring transparent decision-making through ongoing policy reviews. Walking the talk to make DEI an integral part of an organization's DNA is key.

Participants highlighted the importance of intentional changes, adherence to core values, and transparent decision-making to enhance diversity, equity, and inclusion in their businesses. Practical suggestions included appointing a dedicated person for Diversity, Equity, and Inclusion (DEI) to ensure an effective implementation of initiatives. The need for small, incremental policy changes and internal coaching to translate diversity goals into actionable steps was emphasized. Recommended steps for achieving incremental change involved ensuring leaders were aligned and committed to supporting all staff, considering diverse needs, and promoting cultural representation in top management.

Participants also recommended regularly checking and updating policies to match the company's values for ongoing progress in diversity and inclusion, due to the changing nature of DEI. They acknowledged the challenges in giving priority to groups seeking equity, emphasizing the importance of being clear in communication and justifying decisions within the organization to keep things transparent in their diversity efforts.

Key Elements:

- **Structural Shifts in Hiring and Retention Practices**
- **Community Building and Representation**
- **Data-Informed Decision Making**
- **Education for Leadership**

Participant Quotes

"We realize the importance of having someone dedicated to DEI coordination on a national level. It's a key focus for the YWCA, and we're excited to move forward with sufficient support. Hopefully, we'll make progress on this within the next year."

"Prioritizing equity-seeking groups brings its own challenges, and it's crucial to communicate and justify these decisions within the organization to prevent misunderstandings."

"I emphasized the importance of recognizing and respecting cultural differences, with training being a key element to align with our organizational values. We frequently encounter situations where coaching and training are necessary to ensure adherence to our policies."

3| An Urgent Need to Measure DEI Efforts Formally

Transparent decision-making in DEI hinges on proper measurement. This involves setting transparent metrics and conducting objective research on workplace practices. Accountability and measurement are essential for driving positive change in the workplace, even if it requires more time.

Despite recognizing the importance of objectively measuring DEI efforts within their organizations, most participants indicated a lack of formal metrics or formal policies in place in their workplace. Capacity constraints were identified as a significant reason for not having established measures or policies. While some participants mentioned the existence of implied or informally communicated policies, these did not progress to a formalized stage. Participants emphasized the significance of objective research for making inclusive decisions, highlighting the need for a careful and unbiased study of facts and data. This approach to measurement is seen as essential for informed decision-making backed by data to achieve positive outcomes.

Participants highlighted the importance of assessing DEI success through fewer incidents, improved handling of situations, and monitoring changes in company culture. They emphasized the use of metrics, surveys, and listening to real-life stories to measure the impact of efforts and drive concrete changes for advancing DEI in the workplace.

Key Elements:

- **Need for unbiased facts and data**
- **Listening to stories and experiences as measurement**
- **Using metrics to measure success of initiatives**

Participant Quotes

"Measuring progress means looking at fewer incidents and better handling of situations. It's about monitoring changes in our culture and how employees experience things, making sure our goals turn into real actions."

"Objective research is essential for supporting our diversity and inclusion efforts. Using metrics, surveys, and real-life stories helps us measure the impact of our work."

"So I feel like it needs to be enforced but our leaders won't do that. It is like having a very strict measurement of what a leader's competencies need to be. If you don't have DEI values, and they're not advocating for DEI as a leader, then they don't belong here anymore."

4 | Being Aware of Unconscious Bias in Decision-Making

Unchecked unconscious bias in the absence of formal HR policies often persist. SMEs recognized the need for targeted interventions, including training, measurement, awareness, and unbiased career recognition systems, to stop unconscious bias despite capacity constraints. Addressing unconscious bias was highlighted as part of promoting fairness in the workplace.

Participants underscored the detrimental impact of unconscious bias as a major hurdle to Diversity, Equity, and Inclusion (DEI) in the workplace. They recounted instances where unconscious biases influenced career promotions, recognition, perceived intelligence, hiring and firing decisions, and resistance to change. To tackle these issues, the importance of targeted interventions was highlighted, including implementing focused training and HR policies to raise awareness and prevent unconscious bias from impeding career development.

Participants frequently conveyed concerns about limited capacity and resources, encompassing training and education to heighten awareness of unconscious bias. They also highlighted the crucial need for human resources capacity to seamlessly integrate such practices into organizational best practices and policies. Additionally, participants emphasized that, in addressing unconscious bias alongside appropriate policies, promoting leadership with diverse representation can be impactful. This is because their own lived experiences and challenges often pave the way for inclusive and career growth opportunities within their teams.

Key Elements:

- **Emphasis on the necessity of education and training for heightened awareness.**
- **Recognition of limited capacity and resources as a potential risk to DEI.**
- **The impact of bias on recognition and career development for individuals.**

Participant Quotes

"There's a need for more openness and curiosity to understand people from diverse backgrounds and abilities, as well as different genders. Unconscious biases and old assumptions still exist, even within myself, and acknowledging them is the first step. We all have biases, but the key is to be open to learning and continuously improving, both as individuals and as an organization."

"We've done research in terms of emotional tax. And so the experience of the fear of bias in the workplace and how that affects employees, productivity, mental health, you know, how they interact as employees within the organization."

"But when there is a leader of the people and equity department, there is unconscious bias. What kind of work are we going to achieve? When it's for show, it's not intrinsically empathetic, caring and coming from a place of sincerity "

5 | Bottoms Up & Top-Down Approach to Change

Implementing Sustainable Diversity, Equity, and Inclusion (DEI) necessitates changes from both leaders (top-down) and movements from the grassroots level (bottom-up). Lasting change in DEI can only be achieved through collaboration at both levels.

In our conversations, participants highlighted the idea of 'Bottoms up and Top-Down Approach to Change' explaining the importance of focusing on making changes starting from the ground level. This meant committing to diversity and inclusion right from the roots within the workplace, spreading these efforts up through the whole company structure. Organizations actioned this by putting a spotlight on frontline employees and launching efforts to tackle racism and emotional stress. It showcased their dedication to building diversity and inclusion from the ground up in the workplace.

Participants also shared how important it was to have support from top management for DEI initiatives in terms of leaders being invested in DEI efforts and making the effort to introduce change. To participants, the bottoms up and top down approach to change was about meeting in the middle and working on both ends to create sustainable change.

Key Elements:

- **Empowering front-line workers for meaningful change**
- **Leadership commitment from top-down.**
- **Dedication to building DEI from the ground up**

Participant Quotes

"We have a whole new initiative focused on frontline employees and the experience of inclusion for frontline employees. In many ways, when you look at frontline employees, they are the victims of microaggressions and the ones who experience the downside of inclusion on the front line. So how do we actually help to tool and support these employees as employees and also as in many cases of customer service providers, we have worked focused on the experiences of racism within the workplace, and you know, really understanding the experiences from a qualitative and a quantitative perspective. "

"So in that sense, it was bottom up because it was directly related to what we were hearing from the broader staff. We came together to have these deep conversations and that continued on a monthly basis. We continue to work together and that's where we decided we needed to hire a DEI coordinator. It was a recommendation from the HR person who is in and she is responsible for helping us to action, those pieces that really require attention and so it's responsive to a need"

6 | Balancing the Unique Needs of Gender Diversity

Creating a work environment that enables women to find fulfillment in both their personal and professional lives is crucial for cultivating more women leaders. Workplaces that advocate for women's employment but lack the structural opportunities for women to thrive in both aspects risk falling into tokenism.

During our discussions, participants underscored the distinctive challenges faced by women in the workplace. Hindrances to women's professional advancement encompassed unequal opportunities, pay gaps, inadequate childcare support, and financial disparities, including limited access to capital. The significance of intersectionality was emphasized, acknowledging how factors such as race and gender played a pivotal role in determining the extent of obstacles faced by different participants.

Participants shared experiences of career limitations after childbirth, particularly in industries like finance with demanding work hours. Some participants expressed hesitation in pursuing leadership roles due to challenges in balancing work and family commitments. Entrepreneurship emerged as a significant and common choice for women seeking better work-life balance.

Key elements:

- **Work-life balance remains a key motivation for female entrepreneurship.**
- **An intersectional lens is needed to accommodate diverse needs for women**
- **Balancing work and family imposes a significant emotional toll on women.**

Participant Quotes

"Recognizing workplace challenges, it's clear that women often struggle with Work-Life Balance. This includes issues such as limited flexibility, insufficient support for childcare, and a lack of understanding about their unique financial needs."

"We understand the importance of considering diverse backgrounds, that women from different races and experiences may face extra challenges at work because of gender gaps and inequalities."

"I think that's really important. Otherwise, we start breaking things like mental health, which are the foundation with which we're able to perform. And so, it's just like home maintenance, but personal maintenance, you have to have a certain base level maintenance that occurs, otherwise, the building falls down."

Canadian Women's Foundation



What is the Canadian Women's Foundation? *The Canadian Women's Foundation is dedicated to advancing gender justice and equality in Canada. Through funding, support, and amplification of grassroots feminist action, The Canadian Women's Foundation partners with communities and organizations to address pressing issues affecting women, girls, and gender-diverse people, particularly those facing multiple barriers such as First Nations, Inuit, and Métis communities, Black and racialized communities, youth, people living with disabilities, 2SLGBTQIA+ people, newcomers, migrants, and sex workers. By promoting systemic change, fostering diverse leadership, and investing in impactful initiatives, the Foundation aims to empower individuals to become leaders, break free from violence and poverty, achieve economic independence, promote health and wellbeing, and address gendered impacts of climate crisis and injustice. The Canadian Women's Foundation prioritizes working with organizations that address social conditions causing harm, develop urgent initiatives, demonstrate lasting impact, overcome barriers in mainstream social services, co-create and co-lead with affected communities, and forge strong partnerships with other organizations and community leaders.*

How is the Canadian Women's Foundation creating change? *The Canadian Women's Foundation recognizes the difficulty of bringing in a diverse workforce and making lasting changes to organizational structures and culture for sustainable diversity. An important step they have undertaken is ensuring underrepresented groups participate in decision-making and grant-creation processes. The Canadian Women's Foundation has also taken important steps to create a welcoming and inclusive workplace, including prioritizing targeted community hiring, supporting flexible work arrangements, and promoting cross-team training and communication. Some initiatives to address the problem of capacity concerns include the creation of a 'People and Culture' team to cultivate workplace inclusivity, hiring an HR professional for equity-focused policy reviews, as well as developing anti-racist intersectional research guidelines for external partnerships. The organization emphasized the importance of tracking metrics such as retention rates and collecting stakeholder feedback. The organization indicated that these measurements are essential for evaluating the effectiveness of their initiatives systematically and making informed decisions to address the challenges they face. Canadian Women's Foundation aims to keep diversifying its staff, deepen community relationships, and advocate for transformative policy changes.*

"Our staff needs to look like the communities that we're supporting. If we're going to do this well and we're going to do this properly. That's really necessary."

YWCA Canada



What is YWCA? YWCA Canada is a charitable, voluntary organization, which serves as the national coordinating body for the YWCA movement in Canada. Decades ago YWCA set out on a path to be a strong voice for women. Today, YWCA Canada is at the forefront of the critical issues facing women and girls in the country. From ending gender-based violence, alleviating poverty, trauma-informed practice, and leadership programs for girls and young women, YWCA's nationally are leading a local response across the country on critical issues. YWCA focuses on strengthening Member Associations and their national movements to empower women, stand up for social justice, and foster healthy communities. YWCA Canada wants to build leaders who can improve and teach the organization's values in their communities. They deliver projects that advance the leadership skills of self-identified women, girls & non-binary youth; and, build capacity for leaders to step into decision-making roles in their communities. YWCA develops tools and resources to build stronger YWCA Member Associations by supporting YWCA leaders, boards, and staff to achieve their vision. Diversity, Equity, and Inclusion is part of their organizational values and their efforts reflect that.

How is YWCA creating change? To address present DEI needs, YWCA prioritizes equity-seeking groups by creating initiatives like equity resource groups for Black, Indigenous, and other peers, fostering an inclusive environment for peer support and mentoring. The organization emphasizes transparent communication and feedback, providing a safe space for anyone facing workplace challenges. YWCA Canada undertakes many initiatives to meet their vision. YWCA has established an Indigenous circle as a space for Indigenous colleagues and incorporated recommendations from Canada's Truth and Reconciliation Commission into the organization's work. They have also witnessed the positive results of providing allyship training for non-marginalized staff alongside the equity resource groups. YWCA nationally leads local responses across the country on these critical issues. The organization focuses on strengthening equity integration in all areas, from hiring to daily operations, with a commitment to enhanced tracking of progress on DEI goals over time.

"A big part of our work revolves around providing support to our colleagues from BIPOC (Black, Indigenous, and People of Colour) backgrounds when they face challenges, encounter racism, or explicitly experience workplace harassment. Being a source of support during these moments has been both a pleasure and a frustration."

Catalyst Canada

What is Catalyst?

Catalyst is a global, mission-based nonprofit that works with companies around the world to help build workplaces that work for women. Grounded in over 60 years of experience, Catalyst conducts preeminent, leading-edge thought leadership and creates holistic end-to-end solutions that equip companies and leaders with the strategy and tools needed to drive change and measure impact. Catalyst helps organizations invest in their people and build inclusive workplaces that organizations want and need.

How is Catalyst creating change?

In Canada, Catalyst brings together a committed community of business and thought leaders across industries to encourage learning from Catalyst and from each other, sharing leading practices and building positive change. Recognizing the significant impact global events have on employees and organizations, Catalyst encourages open and inclusive dialogue to be responsive to evolving issues. Catalyst's research serves to increase understanding across a wide range of DEI topics and create change-makers throughout all levels of the organization. The research provides the foundation for the development of actionable solutions essential for implementing strategies and seeing sustainable impact. Catalyst research and solutions are used by organizations that are just starting on their DEI journey all the way to those at the leading edge. Through research, tracking metrics, and impactful stories from companies around the world, Catalyst demonstrates the importance of focusing concerted efforts on building inclusive workplaces where all individuals can grow and thrive.



"We've launched a comprehensive initiative focusing on the experiences of frontline employees. Additionally, our research on emotional tax sheds light on the impact of the fear of bias, influencing productivity and mental health. Addressing the evolving landscape of work post-pandemic, we've investigated the future of work, emphasizing priorities and challenges for women, especially in remote work scenarios."

Plan International Canada



What is Plan? *Plan International Canada strives for a just world that advances children's rights and equality for girls. The organization stands with children, especially girls, wherever they are oppressed, exploited, left behind, or not equally valued. Plan International Canada is a member of a global organization that partners with youth, families, communities, local organizations, supporters, celebrated ambassadors, and governments. They collaborate with women-led groups and youth councils in shaping their programs. Plan International Canada strives to create a world where children, especially girls, learn, lead, decide, and thrive. The organization tackles the root causes of gender inequality. They work with local governments and partners to advocate for children and develop programs that support them in their right to get an education and be healthy and protected from violence. Plan International Canada develops children's leadership skills and their ability to earn a living when they grow up. They're also there for them when crises strike. And they stay with them to help build a healthy, safe, and sustainable life.*

How is Plan creating change? *Plan International Canada is actively addressing challenges in diversity, equity, and inclusion (DEI), which includes fighting against unconscious bias, challenging outdated mindsets, and addressing the lack of representation in senior leadership. Plan International Canada is starting initiatives such as unconscious bias education, certification programs, and creating opportunities for young girls through strategic corporate partnerships. Plan International Canada emphasizes the importance of demonstrating the business benefits of DEI, drawing inspiration from successful models, promoting transparency in reporting results, and working to increase diversity in senior leadership roles. Plan International Canada is actively addressing gender equality and diversity through various unique initiatives. This includes employee resource groups and committees formed by people from underrepresented groups at all levels in the organization dedicated to promoting diversity, equity, and inclusion education, engagement, and events. Moreover, Plan International Canada also collaborates with corporate funders to develop international development programs, creating opportunities for young girls in Africa, Americas, Asia-Pacific and Europe. The organization aims to foster a more inclusive culture, echoing their commitment to ongoing progress in DEI.*

"I think we need to start demonstrating the value of DEI and what it contributes to the success of an organization. So let's stop focusing on the differences but rather the benefits and byproducts of DEI, so people want to foster it more and be more inclusive and definitely focus on achieving greater equity."

Shauna Rae

Director, Radar Media



Who is Shauna? Shauna spent 10 years as a radio journalist and 10 more in communications, PR, and community engagement. Radar Media is a media disruption company, specializing in unique communications, events, and multimedia production, designed to spark meaningful, systemic change. The last few positions Shauna held were supporting rural entrepreneurs in Ontario. She left because she found telling stories of underserved communities seemed like simply a box check. She wondered why offices were not seeking out and building relationships with underrepresented folks. That's how Radar Media was born.

How is Shauna creating change? As a sole founder, Shauna faces the challenge for much-needed team expansion while managing the company single-handedly. Bringing on additional team members would aid business growth and provide more opportunities for Shauna to focus on advancing DEI initiatives. Shauna introduces DEI initiatives through partnerships, such as collaborating with an Indigenous healing center to learn from Indigenous knowledge and to gain decolonizing perspectives. Her efforts aim to listen and to amplify diverse viewpoints. She has also assessed the inclusivity practices of Canada's Chambers of Commerce. She worked with post-secondary students from underrepresented groups through the Venture for Canada program, who came up with criteria to evaluate over 400 chambers. After the assessment, a second group of Venture for Canada students built a roadmap for how chambers can implement DEI initiatives. Shauna envisions promoting DEI in rural workplaces by advocating for diverse representation, an action-based commitment to the TRC Calls to Action, fair decision-making, encouraging collaboration, and championing workplace flexibility.

"I've done the podcast for the past three years and what I continue to see is a stubborn resistance to diversity and accountability in rural spaces. Also, the thinning of factual news resources continues to be an issue. The terms 'journalism' and 'news' are social constructs created so we white folks could control a very specific narrative. I am working with an Indigenous group on birthing what journalism should look like, beginning with Indigenous ways, Indigenous knowledge and Indigenous ceremony. Stay tuned."

Ritu Kohli-Sethi

Managing Partner, Greater Toronto Executive Centre



Who is Ritu? As the managing partner at Greater Toronto Executive Center, Ritu oversees flexible workspace solutions, managing operations and actively shaping an inclusive environment. Ritu's journey as a first-gen Indian immigrant in Canada isn't just about business—it's a vibrant tale of family, community, and making a difference. In their family venture, they're not only succeeding in business but also giving back with heart, supporting local food banks, and more. Ritu cherishes the unique blend of working with her family, managing her own time, and bringing in her corporate flair. Ritu's team turns personal stories into action at the Greater Toronto Executive Centre through inclusive policies, training, and open conversations. Ritu's organization is not just a workspace; it's a cultural melting pot where everyone feels at home.

How is Ritu creating change? In the world of DEI, Ritu emphasizes the importance of understanding cultural differences in business practices. Serving a diverse clientele, including immigrants and women entrepreneurs, Ritu's approach aims to overcome biases and assumptions related to gender. To address these challenges, her training with her team includes cultural sensitivity and an emphasis on communicating clear guidelines for acceptable professional conduct in the centres. Empowerment is a key focus, where Ritu encourages each team member to handle client interactions independently, fostering confidence and subsequently, creating a culture where members trust each other to discuss personal circumstances and collaborate on solutions for continuous improvement. Ritu's team measures the success of DEI initiatives through various methods, including tracking the time it takes staff to close deals and monitoring negative interactions. She also gauges the impact of empowerment initiatives by observing staff seeking coaching or support. Acknowledging the challenges of implementing formal metrics for SMEs, Ritu's initiatives aim to create an inclusive workplace where diverse situations are navigated openly, fostering a collaborative and supportive atmosphere.

"As someone from a visible minority, a woman, and an immigrant background, I've encountered unique challenges in the business landscape, particularly in cultures where gender dynamics may differ. Establishing my position took time, but we now empower our diverse team to navigate such cultural nuances. Our approach includes handling negotiations comprehensively, fostering inclusivity, and coaching staff on effective assertiveness in navigating potential challenges with clients or partners."

Kristine Beese

CEO, Untangle Money



Who is Kristine? Kristine is the CEO and Founder of Untangle Money. After navigating through various positions in engineering and finance, she encountered challenges as a working mother, inspiring her current role focused on designing financial tools tailored to women's unique financial needs. Growing up in an immigrant family, she embraced diversity early, cultivating adaptability. A successful female athlete, she carried an athlete's mindset into a male-dominated finance industry. Despite her many talents, Kristine faced the nearly impossible logistical challenges of balancing work with young childcare needs and drew attention to workplace flexibility issues. This, along with her negative experience of not being taken seriously as a female bank customer, fueled the creation of Untangle Money. Here she combines her passion for driving equity for women, with her deep insights into the banking space, to address gaps faced by women while being served by the finance industry. Her story is a testament to the impact of personal experiences shaping DEI-focused initiatives.

How is Kristine creating change? While navigating the DEI landscape, Kristine highlighted the challenges that she has had to face such as feeling unseen as a working mother in a male-dominated environment. She also went through setbacks like career impediments after maternity leave, overcoming imposter syndrome, and managing mental health challenges in high-stress work environments. She has encountered instances of denial regarding gender inequalities in financial tools, despite well-established research supporting these concerns. Driven by a commitment to combat gender-based inequality in financial planning, she envisions Untangle Money supporting 1 million Canadian women in the next four years. She is determined to address significant obstacles such as the wage gap, and offers specialized courses tailored to everyday middle-income women. She is working both with individual women and with forward-thinking companies and speaking directly to female employees to help them better understand their financial future. Untangle Money actively invests in education through conferences, webinars, and workshops while engaging in speaking engagements to raise awareness of a financial industry that does not account for the differences between males and females... She has developed financial planning tools specifically tailored to address women's needs. Untangle Money is taking unique initiatives internally to foster diversity. She is closely monitoring metrics like turnover and pay equity to measure the results of her DEI workplace and understand how her employees are feeling. She also advocates for policies like pay transparency and representation goals within her own organization.

"Insurance providers tell us that the fastest-growing cause of short-term disability is financial anxiety. We're proud to see a 30% reduction in the financial anxiety of the women who complete their Untangle MINI, on average. As such, companies could use our offering to take preventative action to temper this growing disruptive expense."

7.0 What's Next?



1. Prioritize trust building

Fostering workplace trust is crucial for initiating positive organizational change and serves as the initial step toward creating a diverse and inclusive environment. To cultivate trust, SMEs are advised to incorporate diversity in senior leadership, setting an example for diversity in career development. Additionally, creating a safe environment for transparent feedback and communication, along with formalizing procedures through organizational policies and values, is recommended.

2. Integrate DEI into company values

Integrate DEI as a fundamental aspect of the company's values for SMEs. This entails making structural changes, allocating resources, and putting efforts into creating an inclusive hiring and retention experience. This can be achieved by appointing a dedicated HR personnel, implementing formal policies for hiring and promotion, and establishing regular feedback loops to ensure transparent decision-making through continuous policy reviews.



3. Measure DEI efforts

To monitor progress and instigate positive change, SMEs should consider formalizing the measurement of their DEI efforts. Creating transparent metrics, conducting unbiased research on workplace practices, and setting explicit goals for DEI initiatives would be highly beneficial. Despite capacity constraints, allocating resources to collect surveys and real-life stories to gauge the impact of these efforts is crucial. This approach will contribute to establishing an informed and inclusive workplace.

4. Address unconscious bias

SMEs would benefit from implementing education and training programs to tackle unconscious bias. In the face of limited resources, prioritize initiatives that raise awareness and understanding of biases. Introducing unbiased career recognition systems and emphasizing the positive impact of diversity in the workplace is one small but effective step.

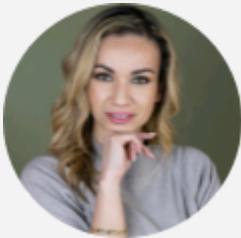


5. Implement a Bottoms Up and Top Down Approach

Initiate transformation within SMEs by fostering change from both top-down and bottom-up approaches. Empower frontline workers by addressing their specific challenges and experiences. SMEs are encouraged to ensure leadership commitment to DEI efforts and actively involve leaders in implementing organizational changes. The latter will help cultivate an environment where everyone collaborates to create lasting and meaningful change throughout the organization.



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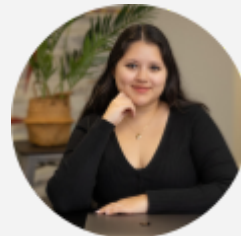
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Thank You!

A sincere thank you to all who participated.

