



Coming Fall 2024

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LAB

2024 Top 50 Equitable Funders

An annual ranking and analysis of Canada's largest grantmakers

Top 50 Equitable Funders - Survey Preparation Document

Do you have an existing DEI policy related to your granting strategies?
<i>Answer format: yes / no</i>
Do you have an existing DEI policy related to your investment strategies?
<i>Answer format: yes / no</i>
Can you demonstrate that your DEI efforts are reflected in your hiring and procurement practices?
<i>Answer format: yes / no</i>
Can you demonstrate that you have existing processes for board/staff/advisors/vendors to become DEI-informed and competent?
<i>Answer format: yes / no</i>
Do you provide mentorship to grantees during the funding period?
<i>Answer format: yes / no</i>
Do you provide support to grantees after the funding period?
<i>Answer format: yes / no</i>

OPTIONAL: Comments on DEI Efforts

Please feel free to use this section to provide clarification or additional information regarding your DEI efforts.

OPTIONAL: Attachments regarding DEI Efforts

Please feel free to upload any relevant documents to support the information that you provided regarding your DEI efforts.

Do you gather demographic information about the members of your executive team?

Answer format: yes / no / we do not have an executive team

[N/A for funders without an executive team]

Is at least 50% of the executive team not cis men?

Answer format: yes / no

[N/A for funders without an executive team]

Is there a minimum of 30% POC on the executive team?

Answer format: yes / no

[N/A for funders without an executive team]

Is there a minimum of 30% people under the age of 62 on the executive team?

Answer format: yes / no

[N/A for funders without an executive team]

What percentage of your executive team has relevant lived experience OR is representative of the people they support?

Answer format: [percentage entry]

<i>[N/A for funders without an executive team]</i>
If the executive team is not paid staff, is there a set length of term OR a set number of terms for executive team members?
<i>Answer format: yes there is a set length of term / yes there is a set number of terms / no / our executive team is comprised of paid staff</i>
Do you gather demographic information about the members of your board?
<i>Answer format: yes / no / we do not have a board</i>
<i>[N/A for funders without a board]</i>
Is at least 50% of the board not cis men?
<i>Answer format: yes / no</i>
<i>[N/A for funders without a board]</i>
Is there a minimum of 30% POC on the board?
<i>Answer format: yes / no</i>
<i>[N/A for funders without a board]</i>
Is there a minimum of 30% people under the age of 62 on the board?
<i>Answer format: yes / no</i>
<i>[N/A for funders without a board]</i>
What percentage of the board has relevant lived experience OR is representative of the people they support?
<i>Answer format: [percentage entry]</i>
<i>[N/A for funders without a board]</i>
Is there a set length of term OR number of terms for board members?
<i>Answer format: yes there is a set length of term / yes there is a set number of terms / no</i>
Do you gather demographic information about the members of your granting committee?
<i>Every organization uses different terminology for their various committees. If you have a separate committee, by any name, that oversees granting decisions, please consider that committee when responding to the following questions.</i>
<i>Answer format: yes / no / we do not have a granting committee</i>
<i>[N/A for funders without a granting committee]</i>
Is at least 50% of the granting committee not cis men?
<i>Answer format: yes / no</i>
<i>[N/A for funders without a granting committee]</i>
Is there a minimum of 30% POC on the granting committee?

<i>Answer format: yes / no</i>
<i>[N/A for funders without a granting committee]</i>
Is there a minimum of 30% people under the age of 62 on the granting committee?
<i>Answer format: yes / no</i>
<i>[N/A for funders without a granting committee]</i>
What percentage of the granting committee has relevant lived experience OR is representative of the people they support?
<i>Answer format: [percentage entry]</i>
<i>[N/A for funders without a granting committee]</i>
Is there a set length of term OR number of terms for granting committee members?
<i>Answer format: yes there is a set length of term / yes there is a set number of terms / no</i>
Do you gather demographic information about the members of your investment committee? <i>Every organization uses different terminology for their various committees. If you have a separate committee, by any name, that oversees financial or investing decisions, please consider that committee when responding to the following questions.</i>
<i>Answer format: yes / no / we do not have an investment committee</i>
<i>[N/A for funders without an investment committee]</i>
Is at least 50% of the investment committee not cis men?
<i>Answer format: yes / no</i>
<i>[N/A for funders without an investment committee]</i>
Is there a minimum of 30% POC on the investment committee?
<i>Answer format: yes / no</i>
<i>[N/A for funders without an investment committee]</i>
Is there a minimum of 30% people under the age of 62 on the investment committee?
<i>Answer format: yes / no</i>
<i>[N/A for funders without an investment committee]</i>
What percentage of the investment committee has relevant lived experience OR is representative of the people they support?
<i>Answer format: [percentage entry]</i>
<i>[N/A for funders without an investment committee]</i>
Is there a set length of term OR number of terms for investment committee members?
<i>Answer format: yes there is a set length of term / yes there is a set number of terms / no</i>

What is the salary ratio between your CEO and lowest paid employee?

Your lowest-paid employee's salary is represented by a 1. Your highest-paid employee's salary is a function of how many times more they get paid. For example, if the lowest salary is \$1000 and the highest salary is \$5000, the ratio would be 1:5.

Answer format: __ : __

Do you require the disclosure of internal conflicts of interest?

Answer format: yes / no / unsure

Do you require the disclosure of conflicts of interest between individuals at the funding organization and potential grantees?

Answer format: yes / no / unsure

Do you share data ethics policy when asking for self-disclosure?

Answer format: yes / no

OPTIONAL: Comments on Team and Governance

Please feel free to use this section to provide clarification or additional information regarding your team and governance.

OPTIONAL: Attachments regarding Team and Governance

Please feel free to upload any relevant documents to support the information that you provided regarding your team and governance.

Do you offer constructive feedback to unsuccessful grant applicants?

Answer format: yes / no

What percentage of last year's grantees were first-time grantees?

Answer format: [percentage entry]

Do you require more than 1 report per year from grantees?
<i>Answer format: yes / no</i>
Do you provide support with technical report writing to grantees during the funding period?
<i>Answer format: yes / no</i>
OPTIONAL: Comments on the Application and Reporting Process <i>Please feel free to use this section to provide clarification or additional information regarding your application and reporting process.</i>
OPTIONAL: Attachments regarding the Application and Reporting Process <i>Please feel free to upload any relevant documents to support the information that you provided regarding your application and reporting process.</i>
Last year, did you fund any of the following types of grantees? Select all that apply.
<input type="checkbox"/> Indigenous led organization(s)
<input type="checkbox"/> Black led organization(s)
<input type="checkbox"/> POC led organization(s)
<input type="checkbox"/> Non-cis men led organization(s)
<input type="checkbox"/> 2SLGBTQIA+ led organization(s)
<input type="checkbox"/> Immigrant led organization(s)
<input type="checkbox"/> Youth led organization(s)
<input type="checkbox"/> Low income led organization(s)
<input type="checkbox"/> Religious minority led organization(s)
<input type="checkbox"/> Disability or illness led organization(s)
<input type="checkbox"/> Rural organization(s)
<input type="checkbox"/> Organization(s) less than 3 years old

Non-qualified organization(s)

Non-unionized organization(s)

Small organization(s) with less than 20 employees

OPTIONAL: Comments on Who You Fund

Please feel free to use this section to provide clarification or additional information regarding who you fund.

OPTIONAL: Attachments regarding Who You Fund

Please feel free to upload any relevant documents to support the information that you provided regarding who you fund.

If you offer open-ended grants, what percentage of the requested amount did you fund last year on average?

An open-ended grant is one for which the applicant can request any amount of funding that they require, rather than applying for an amount pre-determined by the funder.

Calculate the difference between the requested amount and the granted amount, as a percentage. If there are multiple, calculate the average across all grants.

Answer format: [percentage entry] / we do not offer open-ended grants

What percentage of your assets under management did you disburse in grants last year?

The CRA mandates that charitable organizations disburse 5% of their assets annually, up from 3.5% prior to January 2023.

Answer format: [number entry]

OPTIONAL: Comments on Funding and Disbursement

Please feel free to use this section to provide clarification or additional information regarding your funding and disbursement.

OPTIONAL: Attachments regarding Funding and Disbursement

Please feel free to upload any relevant documents to support the information that you provided regarding your funding and disbursement.

What percentage of your assets under management is invested domestically, within Canada?

Answer format: [percentage entry]

What percentage of your assets under management is invested in your local community?

The concept of a "local community" can vary but might be a reserve, a rural area, a small town, a region, a city, or a province.

Answer format: we are a national organization / we are an organization dedicated to a particular community (report the percentage below)

Have you divested from carbon-intensive industries?

Answer format: yes, we have entirely divested / yes, we have partially divested / no

Has your organization made any other changes towards socially responsible investments?

Answer format: [open text]

OPTIONAL: Comments on your Investment Portfolio

Please feel free to use this section to provide clarification or additional information regarding your investment portfolio.

OPTIONAL: Attachments regarding your Investment Portfolio

Please feel free to upload any relevant documents to support the information that you provided regarding your investment portfolio.