

CONTEXT

Resource management is both a means and an end for the work of equity.

As a means, resource management ensures that the appropriate resources are available to enable sustainable, equitable change.

As an end, resource decisions have consequences for where benefits and harms accrue in society. It is for this reason that it is vital to approach resource decisions with clarity and intentionality. As changemakers, we have a responsibility to ensure that enough resources are available to advance our commitments and the obligation to build more equitable systems, not merely recreate extractive practices.

LEARNING OBJECTIVES

- 1 Identify and define the five categories of capital: financial, social, human, technological, and cultural.
- 2 Understand the scope of resourcing considerations.
- 3 Apply equity-based resource analysis to your own initiatives.

1 UNDERSTANDING CAPITAL

The Seeds of Transformation framework encourages us to recognize two realities: first, that sustainable change requires an appropriate investment of capital and second, that capital is more than money. Although ‘capital’ and ‘resources’ are often thought of in terms of dollars, material inputs, and human capacity, a proper accounting acknowledges a wider scope. Seeds of Transformation defines five types of capital:

ABOUT ‘CAPITAL’ AND ‘RESOURCES’

‘Capital’ and ‘resources’ are imperfect terms. Particularly when used in relation to people and culture, they can be dehumanizing because they strip away the context of lived and living experiences.

Employing them more generally can be useful at times. For instance, in this document the terms provide a familiar, high-level language for exploring other concepts.

As you engage in your work, always hold the reality that the terms are abstractions. Try to ground planning in the lived realities of people and always remember that resource decisions have tangible consequences for them.

Financial Capital – The financial resources used to support a task or project, including core funding, staff salaries, and, in some cases, relational compensation (recognition, learning opportunities, etc.)

Social Capital – The social relationships and networks that support the completion of a task or project.

Human Capital – The skills, knowledge, and training possessed by individual team members that support the completion of a task or project.

Technological Capital – The technology available to a team that supports the completion of a task or project. This includes technology such as secure databases, project management applications, and telecommunications products such as Zoom.

Cultural Capital – The knowledge, experiences, and behaviours that help an individual navigate culture and cultural norms when completing a task or project.

RESOURCE DEVELOPMENT

FINANCIAL CAPITAL

The **financial resources** used to support a task or project, including core funding, staff salaries, and, in some cases, relational compensation (recognition, learning opportunities, etc.)



SOCIAL CAPITAL

The **social relationships** and networks that support the completion of a task or project



HUMAN CAPITAL

The **skills, knowledge, and training** possessed by individual team members that support the completion of a task or project



TECHNOLOGICAL CAPITAL

The **technology** available to a team that supports the completion of a task or project. This includes technology such as secure databases, project management applications, and telecommunications products



CULTURAL CAPITAL

The **knowledges, experiences, and behaviours** that help an individual navigate culture and cultural norms when completing a task or project



2 RESOURCING CONSIDERATIONS

In addition to expanding the notion of capital, it is necessary to expand the scope of considerations that we apply to resource management. Traditional resource management encompasses a broad set of highly technical topics. Consider the diverse concepts raised by these basic questions:

- What resources are needed to get the work done? (work breakdown)
- In what quantity? (estimation, inventory management)
- Will they be available when they are needed? (project management)
- Where will they come from? (procurement)
- How much will they cost? (budgeting)
- Where will they be stored? (logistics)
- How long will they last? (inventory management)

Excellent information about the technical side of resource management is available through [BDC](#), [PMI](#), and others:

- [Work breakdown](#)
- [Estimation](#)
- [Inventory Management](#)
- [Procurement](#)
- [Budgeting](#)

These technical considerations are important but insufficient when we are striving to produce more equitable systems. Expanding the scope of considerations to include equity-based elements addresses this gap. For instance, we might also ask:

- Who bears the cost of a resource's use, extraction, and management?
- Have resources been allocated equitably with diverse engagement needs in mind or has there been an assumption of homogeneity?
- Are resources creating or dismantling barriers?

When technical and equity considerations are combined, a greater scope becomes visible. It is this scope that enables us to intentionally consider how to apply resources to tasks in a way that balances efficiency and equity. The worksheet that follows has been built to help make consideration of the full scope of resource management a reflexive habit. We encourage you to use the worksheet whenever you are planning or delivering projects, individually or with a team.

3 RESOURCING EQUITY WORKSHEET

OVERVIEW OF THE TOOL

This tool is composed of 4 sections:

- A Task definition:** define the task/project at hand
- B Capital needs analysis:** analyze the different types of capital required to complete the task
- C Resource inventory:** document the resources involved in the task
- D Alignment:** reflect on whether the capital needs and required resources are aligned

WHEN TO USE THE TOOL

The tool is best used at the planning stage of a project or when a fundamental change in a project has occurred. It can also be used at anytime during a project cycle.

Prerequisites:

- High-level understanding of the task(s) you are trying to accomplish.
- 15+ minutes.

Optional:

2-3 other team members.

HOW TO USE THE TOOL

The method used to complete the tool should align with the importance of the task at hand and its scope and scale.

- More detailed approaches may be needed when:
- Partners or community members are involved;
- When the desired outcome is predetermined and inflexible;

- When there is a great deal of uncertainty about the desired outcome or environment in which work is being done;
- When a lot of other work depends on the success of the task.

Main Method:

1. Identify a specific task.
2. Complete a worksheet for the task or use the worksheet to guide a group discussion of the task if time is limited.

Alt Method 1: Project Breakdown

1. Establish a draft project plan, detailing the tasks to be completed.
2. Complete a worksheet for each task.
3. Review all the worksheets together to consider the capital needs of the entire project.

Alt Method 2: Project Summary

1. Establish a draft project plan, detailing the tasks to be completed.
2. Complete a worksheet for the project as a whole, treating the project's main outcome as the 'task' being analyzed.

A TASK DEFINITION

What output will be produced?	
Why does this output matter?	
Who is involved in producing the output?	
What steps are needed to complete the task?	
Summarize the previous details into a concise description of the task.	

B CAPITAL NEEDS ANALYSIS

For each type of capital, respond to the questions in the columns below. Be as specific as possible when answering the questions about each type of capital required to complete the task. Review the definitions of the five types of capital in section 1 of this document.

	How much is needed?	Why is it needed?	When is it needed?	Where will it come from?	Describe the assumptions informing your estimates. As part of this step, consider the capital specific questions included below.
Financial					
	• Are barrier-reducing needs like interpretation and translation accounted for in the costs? • How will this capital invest in people and relationships? (e.g. training, compensation) • How likely are costs to change?				
Social					
	• Are requests for support from partners reasonable? According to whom? • Why are these relationships and networks being engaged and what makes the engagement meaningful? • Are the resources needed to build relationships with and between partners accounted for?				
Human					
	• Are differences in people's needs and abilities accounted for? • Are trauma-informed responses to discrimination, harassment, and accessibility accounted for? • How will the skills, knowledge, and training of people be considered?				
Technological					
	• Are resources that enable inclusion accounted for? (e.g. closed captioning, assistive technologies) • Is the technology accessible to everyone connected to the project? Consider limited internet access issues. • Are the resources needed to safely gather and store data accounted for?				
Cultural					
	• Are different ways of knowing, doing, and being in relationship accounted for? • Are resources invested in supporting engaged communities to lead the work? • Have the costs been validated by those impacted?				

RESOURCE INVENTORY

Use the ‘Where will it come from column’ of the previous table to identify the resources that will be used to complete the task. Note down the resource at the top of each column below and answer the questions for each resource identified. If needed, add more tables for the additional resources.

Examples of resources can include a technological platform, collected data, staff or volunteer time, expertise and skills held by a particular person, etc.

Resource #1:	Name of the resource
Is it renewable? What consumes it? What replenishes it?	
How are we ensuring it is replenished?	
Who bears the cost of resource’s use, extraction, and management?	
Does it need to be stored?	
Are there restrictions on how it can be used? (e.g. regulation, contract, relational)	
What drives costs for the resource? (e.g. amount used, market demand, etc.)	
What cultural and historical contexts are attached to this resource and its use?	
When will it be available?	
Resource #2:	Name of the resource
Is it renewable? What consumes it? What replenishes it?	
How are we ensuring it is replenished?	
Who bears the cost of resource’s use, extraction, and management?	
Does it need to be stored?	
Are there restrictions on how it can be used? (e.g. regulation, contract, relational)	
What drives costs for the resource? (e.g. amount used, market demand, etc.)	
What cultural and historical contexts are attached to this resource and its use?	
When will it be available?	

Resource #3:	Name of the resource
Is it renewable? What consumes it? What replenishes it?	
How are we ensuring it is replenished?	
Who bears the cost of resource's use, extraction, and management?	
Does it need to be stored?	
Are there restrictions on how it can be used? (e.g. regulation, contract, relational)	
What drives costs for the resource? (e.g. amount used, market demand, etc.)	
What cultural and historical contexts are attached to this resource and its use?	
When will it be available?	
Resource #4:	Name of the resource
Is it renewable? What consumes it? What replenishes it?	
How are we ensuring it is replenished?	
Who bears the cost of resource's use, extraction, and management?	
Does it need to be stored?	
Are there restrictions on how it can be used? (e.g. regulation, contract, relational)	
What drives costs for the resource? (e.g. amount used, market demand, etc.)	
What cultural and historical contexts are attached to this resource and its use?	
When will it be available?	
Resource #5:	Name of the resource
Is it renewable? What consumes it? What replenishes it?	
How are we ensuring it is replenished?	
Who bears the cost of resource's use, extraction, and management?	
Does it need to be stored?	
Are there restrictions on how it can be used? (e.g. regulation, contract, relational)	
What drives costs for the resource? (e.g. amount used, market demand, etc.)	
What cultural and historical contexts are attached to this resource and its use?	
When will it be available?	

D ALIGNMENT

Consider the capital needs established in section B and the resource inventory established in section C:

- How well aligned are the needs and resources of the task?
- Are there misalignments that might produce harm? (e.g. under resourcing social capital)
- Are there misalignments that would allow resources to be allocated differently in support of equity outcomes? (e.g. surplus financial resources that could be reallocated)

Note your reflections below.

Looking for more support to use this tool in your context or want to reflect on resourcing equity in your work? Connect with us at tamarack@tamarackcommunity.ca for coaching or guidance.