



## ACTIVATING INCLUSION TOOLKIT

# Tracking Progress and Learning from your EDI Initiatives

The purpose of this tool is to support those leading EDI projects and initiatives to draw out lessons learned, while measuring progress towards their EDI goals and objectives. After using this tool, teams will have developed an approach to evaluate their initiatives.

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## Overview

Knowing whether your projects are achieving their intended results is always important. In working to advance equity, diversity, and inclusion (EDI) it is even more important because the process of assessing the extent to which your efforts are contributing to equity, diversity and inclusion is a part of enacting equity.

Work to advance EDI can be slow-moving and complex. Change is often incremental and not always linear. In this context, evaluation is a useful tool for ensuring that you are still “on track.” Tracking your progress and harvesting learnings from your efforts can provide many benefits:

- Improving upon your work and making it more effective
- Signaling when you may need to adapt as conditions around your initiative change
- Identifying interim achievements that are worth celebrating
- Supporting effective resource allocation and identifying where to focus next steps
- Ensuring accountability to the people working in or with your unit and those you serve
- Sharing experiences with others so that they can benefit from your learning

Evaluation should not wait until your initiative is complete. You can assess its effectiveness as it progresses. This allows you to prioritize learning and adapting as work unfolds.

## Laying the Groundwork for Learning

Thinking about evaluation at the start of your initiative ensures that you collect and maintain the kinds of information that you will later want to use for your reflection and learning. Alternatively, you may decide to undertake an evaluation after you are already in the midst of your initiative. Either way, you will want to consider the following aspects of your initiative to help frame your evaluation process:

<p><b>Equity, diversity, and inclusion lens</b></p>	<ul style="list-style-type: none"> <li>▪ Who are we? Who is involved in our process of capturing lessons learned or tracking progress? What lenses and approaches do we bring?</li> <li>▪ How will our evaluation approach be informed by EDI?             <ul style="list-style-type: none"> <li>▪ Consider, for example: power dynamics among those involved in the effort, workload distribution, weight and value associated with different forms of evidence, accountability to and engagement with the communities your initiative is designed to impact, etc.</li> </ul> </li> </ul>
<p><b>Context and baseline</b></p>	<ul style="list-style-type: none"> <li>▪ What is happening in our context (within our unit, within UBC, and outside of UBC) that informed our EDI initiative?</li> <li>▪ What knowledge and/or assumptions informed our decisions about our initiative?             <ul style="list-style-type: none"> <li>▪ For a more detailed exploration of assumptions and decision-making, refer to the <a href="#"><i>Intentional EDI Decision-Making tool</i></a>.</li> </ul> </li> </ul>
<p><b>Vision</b></p>	<ul style="list-style-type: none"> <li>▪ What broader change do we want to see in our unit, at UBC, in society, that we are working toward?</li> <li>▪ Which aspects of the desired change do we have direct control over, and which aspects require cooperation or influencing others to make changes?</li> </ul>
<p><b>Desired change</b></p>	<ul style="list-style-type: none"> <li>▪ For our EDI initiative, what change(s) are we working to achieve at the end of our implementation?             <ul style="list-style-type: none"> <li>▪ You may already have articulated your desired change as part of your action plan. If not, spend some time determining this now.</li> </ul> </li> <li>▪ Over what time frame(s) do we hope to see change? (short term, medium term, long term)</li> </ul>

<b>Processes</b>	<ul style="list-style-type: none"> <li>▪ What questions do we have about our efforts?</li> <li>▪ What do we hope to learn from this initiative?</li> <li>▪ What assumptions are we making about how our initiative will work?</li> </ul>
<b>Audience</b>	<ul style="list-style-type: none"> <li>▪ Who will want to know this information? Who will be most impacted by this information?</li> <li>▪ How best can we share what we are learning with relevant audiences?</li> </ul>

## Gathering Evidence to Track Progress and Support Learning

Depending on the resources and time available for evaluation, you may decide to use the knowledge and experiences of the people involved in the initiatives, or gather additional evidence in a different way.

If you decide to gather additional evidence, remember that processes of gathering and interpreting evidence come with their own EDI considerations. Refer to the [Using Evidence to Advance EDI](#) tool series for more information.

Use the following template to help identify how you will track progress on your EDI initiatives.

1. For each different initiative in your overall plan, identify the purpose of your initiative along with the change you are hoping to make (as determined in your “laying the groundwork” conversations, above).
2. Identify 1-3 “signals of change.” How will you know change is happening, or what interim changes might you expect to see along the way towards your intended outcome?
3. Name corresponding pieces of evidence you could collect that would help shed light on whether the expected changes are happening. Keep in mind that your evidence could be:
  - Quantitative: something you can count or describe with numbers
  - Qualitative: something that needs to be described through story, illustrative example, or thematically

Note: Over time, you might seek to validate or triangulate your evidence by gathering additional pieces of evidence. For example, if you are using mainly quantitative evidence at first, you might later gather qualitative case studies to exemplify the change you are seeing, or vice versa.

4. For each piece of evidence, determine how you will collect the information, who will collect it, and when it will be collected (for example, administrative data, evaluation surveys, meeting notes, focus groups, etc). Consider whether you can incorporate data collection into the activities of your initiative to streamline the process.
5. Document how you will make sense of the information you collect, how you will communicate your learnings to others, and how your analysis will inform future decisions.

## Evaluation Template

If your plan includes multiple initiatives, fill in this template separately for each initiative.

**Purpose:** Why are we undertaking this initiative?

*We have learned that 2SLGBTQIA+ students experience barriers or do not always feel welcome to access our advising services. This conflicts with our unit's values and goals around being an equitable and inclusive space that provides high quality advising services to all students. We feel compelled to find ways to make our services more aligned with our values.*

**Desired Change:** What will be different when our initiative has been successful?

*When our initiative has been successful, welcoming and relevant supports are readily available for 2SLGBTQIA+ students in our advising services.*

### Signals of Change:

What signals, or components of the larger change, do we expect to see?	What information will we collect?	How will it be collected?	Who will collect it?	When will we collect it?
<b>Signal #1</b> <i>Advisors in our unit actively seek out training and education on 2SLGBTQIA+ issues.</i>	<i>How many advisors have participated in the training?</i>	<i>Tracking workshop attendance</i>	<i>Administrative Staff</i>	<i>After each workshop</i>
<b>Signal #2</b> <i>Advisors are actively integrating their learning into their daily practice.</i>	<i>Feedback from advisors with examples of how they have implemented their learnings</i>	<i>Ask advisors to discuss this in a staff meeting</i>	<i>Manager #1</i>	<i>March 2022</i>

<b>Signal #3</b>	<i>Differentials between heterosexual students and 2SLGBTQIA+ in how they experience our services has reduced (and is eventually eliminated)</i>	<i>% heterosexual students satisfied with our support and % 2SLGBTQIA+ students satisfied with advising services</i>	<i>Undergraduate Experience Survey (a question about satisfaction with advising services is part of the survey)</i>	<i>Survey run by the Planning and Institutional Research (PAIR) Office.  Manager #1 will submit the request to ask for this analysis specifically.</i>	<i>UES is run two out of every three years, data is usually available mid-summer.</i>
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**Analysis:** How will we analyze and make sense of this information?

*Staff Member #2 will collate the information and present it to the project working group. We will discuss what the evidence seems to be telling us and reach conclusions together as a group.*

**Communication:** How will we document and share what we have learned, and with whom?

*Staff Member #2 will create a summary of our key insights and get feedback from the working group. We will share this with all staff and faculty working in our unit, as well as key students who have provided input on the project. If we feel our learnings have been significant, we will seek ways to share them with others in the UBC community, for example via the Inclusive UBC Newsletter or by publishing our summary report on our website.*

**Applying our learning:** How will we use what we have learned to inform future decisions?

*Staff member #3 will circulate the summary of our evaluation to all decision-makers. We will revisit the main findings during planning sessions. When our learnings lead to adjustments or changes in our initiative, we will document this and include it in communications about our evaluation.*

## Reflection Questions to Support Learning

Decide on a schedule of evaluation check-in points to have with the planning team, leadership team, or other relevant group(s). Groups often choose the mid-point and end of an initiative, but it’s also important to be alive to signals that adjustments may be needed at any point.

Select from the following reflection questions, or generate your own, to assess your initiatives. If you have used the evaluation template to collect signals of change, you can use these questions alongside the template. These questions can still support your learning if you have not engaged with the evaluation template.

Keep in mind that your learning will be shaped by the perspectives that are present as you have these conversations – consider how you can expand the range of perspectives and experiences that are present in your reflection exercise.

You can also use these questions to construct a simple case study of your initiative for sharing with others undertaking similar work.

### **Our process**

1. How has the experience been for those involved in the process of moving this initiative forward?
2. How have we taken into account or responded to issues of equity, diversity, and inclusion during the process of moving this initiative forward?
3. What elements of our context (within our unit, within UBC, or outside of UBC) contributed to or detracted from our efforts?

### **Our impacts**

4. Are we making a difference? What signals of change are we observing?
5. Is our effort doing what it was intended to do? In what ways do we think our efforts are contributing to our desired change?
6. What have been the unintended (positive or negative) consequences of our effort?

### **Our strategies**

7. What's working, and why do we think it's working?
8. What assets (knowledge, resources, tools, relationships) have contributed to our successes?
9. What have been the most important factors in our successes? Was there a "turning point" moment that made success possible?
10. What challenges have we encountered? How have we worked to overcome them? What more do we need to do?

### **Our next steps**

11. What's changing in our context? Does our original focus still make sense, or do we need to shift it?
12. What new challenges and opportunities are emerging? What might we need to do differently?
13. What new questions do we have?

## Next Steps

Use what you have learned to adjust, adapt, or try other initiatives. Ensure that reflection and learning continue to inform your efforts so that you can allocate effort and resources most effectively. Share what you have learned with the people and communities who are impacted by your initiative, and consider sharing your learnings with others undertaking similar work.

When you discover that a change in direction is called for, appreciate this discovery as substantive learning. In addition, don't forget to celebrate when this process uncovers successes or forward progress.

## Resources

Beer, Tanya. (2017). *Systems Change Evaluation Forum: Executive Summary*. Center for Evaluation Innovation. Accessed at: <https://www.evaluationinnovation.org/wp-content/uploads/2017/05/final-systems-evaluation-forum.pdf>

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Cox, Philip, Kozak, Sherry, Griep, Louise, and Moffat, Lisa. (2002). *Splash and Ripple: Using Outcomes to Design and Guide Community Work*. PLAN:NET LIMITED. Accessed at: <https://www.canada.ca/en/health-canada/corporate/about-health-canada/reports-publications/grants-contributions/splash-ripple-using-outcomes-design-guide-community-work.html>

Douglas, Freya. (April 2014). *Measuring Progress on Equality: Qualitative Evidence*. Equality Challenge Unit. Accessed at: <https://www.ecu.ac.uk/wp-content/uploads/external/measuring-progress-on-equality-qualitative-evidence.pdf>

Equitable Evaluation Initiative (2020). *Equitable Evaluation Framework*. Accessed at: <https://www.equitableeval.org/framework>

Gamble, Jamie A. A. (2008). *A Developmental Evaluation Primer*. The J.W. McConnell Family Foundation. Accessed at: <https://cdn2.hubspot.net/hubfs/316071/Resources/Publications/Developmental%20Evaluation%20Primer.pdf>