



## ACTIVATING INCLUSION TOOLKIT

# Using Evidence to Advance EDI: Making Sense through Participatory Analysis

This tool supports leaders and teams to collaboratively analyze relevant and available equity, diversity, and inclusion data through a participatory analysis process. After using this tool, teams will have a summary of their key insights. These insights can be shared more broadly within the unit and integrated into the next phases of the unit's inclusion action planning.

---

Version: May 2023

## Introduction

Many units take steps to access or collect relevant equity, diversity, and inclusion (EDI) data as they work to assess the current state of EDI in their unit. Once data is obtained, however, it needs to be interpreted. This tool is designed to support your unit to take an inclusive, participatory approach to EDI data interpretation (i.e. making sense of the data).

There are a number of reasons why a unit may want to use participatory data analysis:

- Since many of our most common ways of using data tend to reinforce existing power dynamics, participatory processes can enable the data to be examined, interpreted, and used in ways that question current narratives in order to redistribute power and advance EDI. For more information, refer to the introduction of the [Inventory of Existing Knowledge](#) tool.
- Since leaders are in positions of greater power within the unit, they may have fewer insights into the experiences and perspectives of those with less power. Participatory analysis can enrich the interpretation by bringing marginalized perspectives and knowledge to the table.

## Steps to participatory analysis of EDI data:

1. Locate and distill relevant EDI data
2. Design a participatory data analysis activity
3. Facilitate the activity
4. Decide on Next Steps

### Locate and Distill Relevant EDI Data

Relevant EDI data may include qualitative or quantitative sources. It might be data collected at the institutional level that your unit may be able to obtain, or data that your unit has collected through other processes such as the [Inventory of Existing Knowledge](#) tool, the [EDI Self-Assessment Tool](#), a survey, or other process.

Relevant EDI data might cover a number of topics, as described in the EDI information framework:

Information Type	Description	Example
<b>Demographics</b>	Information about the composition of your unit	Proportion of staff working in our unit who identify as having a disability
<b>Life-cycle and pathways</b>	Information about the career or degree trajectories of people in your unit or whom your unit serves, including those who leave the unit	Time to tenure for racialized faculty
<b>Perceptions and experiences</b>	Information about the self-reported experiences of people in your unit; their perceptions and impressions of your unit	Sense of belonging among 2SLGBTQIA+ students
<b>Equity-minded<sup>1</sup> behaviours and practices</b>	Information about the extent to which people in your unit have adopted behaviors and practices or that advance EDI	Proportion of faculty incorporating inclusive pedagogies
<b>Processes and systems that promote EDI</b>	Information about the extent to which your unit has applied an EDI lens to its processes and procedures	Presence of a procedure to ensure that events your unit hosts are inclusive

<sup>1</sup> Center for Urban Education. (2020). Laying the Groundwork: Concept and activities for racial equity work. Rossier School of Education, University of Southern California.

## Design a participatory analysis activity

Participatory data analysis is a method that involves bringing a group of stakeholders into the data interpretation and meaning-making processes.<sup>1</sup> This method allows a diversity of perspectives to provide a more comprehensive understanding of the current state of equity, diversity and inclusion in your unit. In practice the activity can be organized in a number of ways, including as an in-person or online session such as a “data walk”, “data party”, or “data placemat.” Further information on each of these activities can be found in the “additional resources” section of this document. However, the principles and advice for a participatory analysis activity are similar across the different activity types.

Broadly speaking, participatory analysis activities involve designing a method to present data that has been collected with a group of community members who have a stake in the data or in what happens as a result of the data—for example, students, faculty, and staff in your unit.

Typically, small groups engage in discussions around each data point or collection of data points, using carefully crafted reflection questions. Through these conversations, community members have the opportunity to provide insights on the data from their varied perspectives and to collectively make meaning of the data.

See Appendix A for a planning template to help organize the decisions you make as you design the activity.

## Refining your data

The first key task in advance of the session is refining the data that you plan to share with the activity participants. To determine which aspects of the data to share, the planning team might ask themselves questions including:

- **Background data:** What information do participants need in order to make meaningful contributions and interpretations?
- **Unique perspective:** What questions do we have about this data that we think participants can help to answer?
- **Relevance:** (If there is too much data to present all of it) which data points are most relevant, time-sensitive, or highest priority? Which will play a primary role in shaping what we do next?

---

<sup>1</sup> Learning for Action (n.d.) “Participatory Analysis.” Accessed at: <http://learningforaction.com/participatory-analysis>

You might choose to design your activity around each data point being discussed separately, or to group a small number of related data points together into one data “station” or “finding.”

*Tip:* Select a manageable number of data points/findings for the activity length and number of participants. For a two hour session in which you want all participants to address every “data station” in small groups of 3-5 people, we suggest 5-8 data stations.

When planning how you will present the data points to participants, be intentional about embedding equity and inclusion in the way you visualize the data. Consider how choices around colours, shapes, labels, and headings will be experienced by diverse participants. Consult additional resources around [data visualization for equity](#).

## Choosing reflection questions

Once you have identified the data points you plan to share, the next step is choosing the reflection questions that will guide the activity. Below is a list of potential reflection questions, organized into three broad categories: *Reviewing the Data*, *Interpreting the Data*, and *Relating the Data to Your Local Context*. In order to keep the time at each data finding station to 15 to 30 minutes, while supporting a broad-based discussion, you may want to select one question from each of the categories, to be asked for each of the data points or collection of data points.

You can use the same reflection questions to discuss each data point, or select different questions for different data points, depending on what you think will support the most useful discussion. Of course, you can also develop your own questions to ask.

## EDI Data Reflection Questions

The following questions are broad in nature and can typically be applied across most, if not all, data sources. For a list of sample questions specific to the Undergraduate Experience Survey, the Employment Equity and Inclusion Survey and the Workplace Experience Survey, please see Appendix B.

### *Reviewing the Data*

- What is the data telling you?
- What patterns or themes do you observe?
- What is missing from the data?
  - Which designated equity groups are missing from this data source?
  - Are there any groups that are consistently not represented in this data source?

### *Interpreting the Data*

- How does this data align with expectations or assumptions you may have had about your unit?
- What stands out for you?
- Is there anything you find surprising?
- Is there anything that raises a red flag or highlights an area of concern?

### *Relating the Data to Your Local Context*

- What does the data tell you about the work needed to enhance EDI at UBC?
- In what ways might the data affect your unit's ability to address EDI issues?
- How might structures—policies, procedures, services, pedagogy, and physical space—affect the data in question?
- What does the data tell you about new or existing opportunities to address EDI issues within your unit and at an institutional level?
- What new questions have come up as a result of your discussion(s)?

## **Designing the activity**

As with all events and activities, you should ensure the participatory analysis activity is as accessible and inclusive as possible. This means considering who is in attendance, the timing and format of the activity, and how to mitigate the effects of power dynamics within the activity, including between people who hold different roles in the unit and who hold different marginalized and privileged identities. Consult additional resources on [accessible and inclusive event planning](#).

## **Facilitate the activity**

One or two people should be designated to lead the activity and guide participants through the various steps. You may also find it helpful to appoint a note taker to capture key discussion points and themes, especially during the debrief of the session.

At the end of the session or in a short wrap-up meeting after the session, complete the Insights Table below. The Insights Table was designed to capture the key discussion points and themes that emerged from the activity. Think of this table as a summary of the key insights that you would want every individual in your unit to be aware of.

If you complete the insights table after the activity has finished, consider sending the Insights Table to participants for review and final edits and feedback before sharing it more broadly. The recorded takeaways will help to guide next steps.

---

### Insights Table

*What insights and learnings did you gain from this process that you will use to inform your EDI efforts going forward?*

Insight	How will you use the insight?

### Next Steps

Now that you have engaged in participatory data analysis, you can use your insights to inform your EDI efforts going forward. The “how will you use the insight?” column in your insights table will help identify concrete actions that you can take. Depending on where you are in the cycle of planning, learning, and action, you may be ready to prioritize your EDI actions, or to update your initiative plans to reflect what you have learned.

### Additional Resources

#### Data Walks

Murray, Brittany, Falkenburger, Elsa, and Saxena, Priya (2015). Data Walks: An Innovative Way to Share Data with Communities. Urban Institute. Accessed at: <https://www.urban.org/research/publication/data-walks-innovative-way-share-data-communities>

#### Data Parties

Better Evaluation (2021). “Data Party.” Accessed at: [https://www.betterevaluation.org/en/evaluation-options/data\\_party](https://www.betterevaluation.org/en/evaluation-options/data_party)

## Data Placemats

Pakaj, Veena and Emery, Ann K. (2016). Data placemats: A facilitative technique designed to enhance stakeholder understanding of data. In R. S. Fierro, A. Schwartz, & D. H. Smart (Eds.), *Evaluation and Facilitation. New Directions for Evaluation*, 149, 81-93. Accessed at: <https://doi.org/10.1002/ev.20181>

## Equity in Data Science

Krause, Heather (2022). We All Count: Project for Equity in Data Science. Accessed at: <https://weallcount.com/>

## World Café Method

The World Café Community Foundation (2015). Café to Go: A Quick Reference Guide for Hosting World Café. Accessed at: <http://www.theworldcafe.com/wp-content/uploads/2015/07/Cafe-To-Go-Revised.pdf>

## Appendix A: EDI Data Walk Design Template

Data Finding	Data Source	Reflection Questions
e.g., Proportional Representation of Racialized Students, Students with Disabilities, and Non-binary and Trans Students	Undergraduate Experience Survey	1. 2. 3.
e.g., Proportional Representation of Designated Equity Groups amongst Staff & Faculty	Employment Equity Survey	1. 2. 3.
e.g., Students' feelings of inclusion and support from their faculty	Undergraduate Experience Survey	1. 2. 3.



## Appendix B: Sample reflection questions for specific institutional data sources

The following section lists sample reflection questions specific to three key UBC data sources from which you may have curated your unit's data findings.

### Undergraduate Experience Survey

- Which designated equity groups are less or more likely to agree on statements of inclusion and respect relative to their comparator groups?
- Are differences in levels of agreement between designated equity groups and their comparator groups consistent across statements?
- For which statements are designated equity groups agreeing less or more relative to their comparator groups?
- For which statements are designated equity groups agreeing at a high or low rate overall (e.g., below 60% or above 80%)?
- For which competencies are students more or less likely to report having strong versus weak proficiency? Is there anything distinct about those proficiencies?

### Employment Equity Survey

#### *Proportional Representation of Designated Equity Groups – Staff & Faculty*

- What staff and faculty trends over time do you observe in your unit/faculty/division?
  - How do trends compare to UBC overall?
  - Has proportional representation increased or decreased?
- Are there gaps in data availability?
- What does faculty representation look like your unit/faculty/division?
  - By designated equity group?
  - By rank (applies to Faculty)?

#### *Employment Equity Data by Occupational Group—Staff & Faculty*

- For which designated equity groups and occupational groups does your division meet or exceed the availability of these groups according to the 2016 Canadian labour market Census? Where does representation fall below availability?
- Does there appear to be systemic issues with recruitment and/or retention of any particular equity group (i.e. a consistent need for increases across occupational groups)?

- How might the composition of your division reflect current societal trends in the province or Canadian society? For example, are there any cases where a need for representational increase is indicated, but a group already comprises a fairly significant proportion of the occupational group?
- How might the composition of your unit reflect historical patterns of exclusion for some groups?
- How do trends compare to UBC overall?

### **Workplace Experience Data**

- Which equity groups less or more agreement on statements of inclusion and respect relative to their comparator groups?
- Are differences in levels of agreement between equity groups and comparator groups consistent across statements?
- For which statements are equity groups agreeing more or less relative to their comparator groups?
- For which statements are equity groups' agreeing at a high or low rate overall (e.g. below 60% or above 80%)?
- How do trends compare to UBC overall?

See the [2017 WES Action Plan worksheet](#) for a guide to capture what is interesting in your results, celebrate what is working well, and identify an area of focus for action.