

StEAR Evaluation Approach

Version 1.0: June 2024

UBC Equity and Inclusion Office

Introduction

This document provides an overview of the evaluation approach being used to track progress and evaluate UBC's [Strategic Equity and Anti-Racism \(StEAR\) Framework and Roadmap for Change](#).

The purposes of the StEAR evaluation are to:

1. Understand:
 - the extent to which UBC is making progress towards the goals of the StEAR Framework, as articulated in the four domains of change (structural, curricular, compositional and interactional);
 - the extent to which UBC is progressing the systems interventions articulated in the StEAR Roadmap's objectives and strategic actions; and
 - what we are learning about the patterns and conditions that are conducive to change
2. Surface and activate opportunities for these insights to shape our ongoing and evolving strategies.
3. Communicate how we know change is happening.
4. Contribute to the field of knowledge about approaches to systems change to advance EDI and anti-racism in the postsecondary context.

Background: Accounting for complexity

StEAR efforts at UBC are characterized by complexity. The multiple, overlapping systems at UBC are never static, and change unpredictably. Events in one part of the system affect all other parts of the system, and cause and effect are not necessarily linear or straightforward – yet patterns do emerge. Context and relationships are important factors in determining outcomes, often more so than the interventions themselves.

As described by Preskill et al (2014), the complexity of social change efforts has a number of implications for evaluation of such efforts. These include:

- designing evaluation approaches that are flexible, adaptable, and iterative;
- prioritizing information exchange and feedback loops;
- attending to the system as a whole as well as its component parts and sub-systems; and
- monitoring and responding to changes in context.

Lines of Inquiry

Drawing on Cabaj's (2019) inquiry framework for evaluating systems change efforts, the EIO has developed a StEAR evaluation approach that addresses three broad lines of inquiry: systems interventions, outcomes, and strategic learning.

Figure 1: StEAR Evaluation Approach Lines of Inquiry (adapted from Cabaj, 2019)

Outcomes	Systems interventions	Strategic learning
<ul style="list-style-type: none"> • For individuals • For targeted groups • For populations 	<ul style="list-style-type: none"> • In system behaviours and processes • In behaviours of actors in the system (individuals, groups, units) 	<ul style="list-style-type: none"> • About what we are doing • About how we are thinking • About how we are being

Outcomes

In inquiring about outcomes, we are aiming to understand how the experiences of people at UBC are changing in alignment with the goals of the StEAR framework. We want to characterize what is actually changing for people, whether on an individual, group, or population level. This includes building an understanding of UBC community members’ trajectories through the university, as well as their subjective experiences during their time here.

While we hope that StEAR efforts at UBC have profound individual-level impacts, our inquiry focuses primarily on understanding the changes for targeted groups (such as people who hold identities that have been historically, persistently, or systemically marginalized) or the UBC population as a whole. This is due to constraints in our capacity and institutional information infrastructure, which limit the extent to which we can assess impacts at an individual level. We will nevertheless remain vigilant for opportunities to draw on stories of individual change to help us better understand the broad range of outcomes that people may be experiencing.

Systems interventions

Our inquiry into systems interventions seeks to understand whether and how relevant processes, practices, and structures are changing. For the primary system of UBC as a whole, the systems interventions we seek to understand are articulated as the 135 Strategic Actions in the StEAR Roadmap for Change. For sub-systems such as UBC’s decentralized Faculties, vice-president portfolios, departments, and units, systems interventions may vary across different contexts.

As we seek to understand the systems interventions taking place, Cabaj (2019) also reminds us to keep attention to: how deep and durable the changes are, whether there have been any unanticipated changes, and whether there are indications that the system might ‘snap back’ into old patterns.

Strategic learning

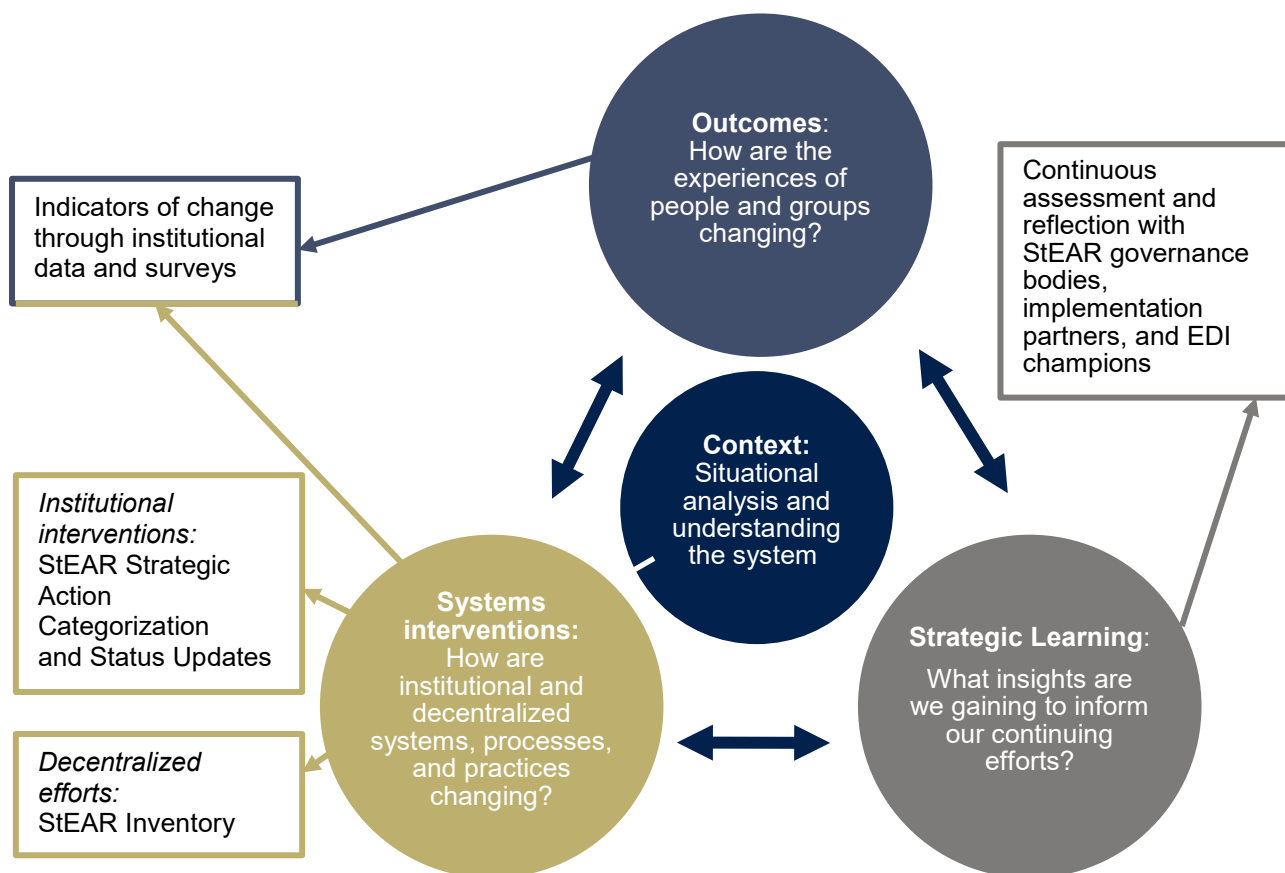
In the area of strategic learning, we ask: what insights are we gaining to inform our efforts? These insights may relate to our actions and strategies, the thinking that underlies these actions and strategies, or the interactions and experiences of the constellation of actors involved in StEAR implementation; more succinctly summarized as learning about what we are doing, how we are thinking, and how we are being.

Strategic learning is a critical component of the evaluation approach, given the complexity of the system and the changes we are trying to make. It allows us to adapt our efforts in response to our changing understanding of the task at hand.

Information gathering components

The three lines of inquiry in the StEAR evaluation approach are each associated with one or more components of information gathering and data collection. Accordingly, the components are connected and also influence each other. Reflecting on new insights (strategic learning) is critical for developing effective strategies (system interventions). We must monitor and understand the underlying conditions (context) in which these interventions are happening in order to make sense of any change we observe (outcomes).

Figure 2: StEAR Evaluation Approach (adapted from Cabaj, 2019)



Institutional indicators of change (outcome measures)

Cyclical collection and analysis of institutional data helps to describe the current and changing EDI and anti-racism landscape at UBC. These institutional indicators may inform two lines of inquiry: outcomes

and/or systems interventions. Institutional indicators of change are primarily drawn from administrative data or institutional surveys that are connected to one or more StEAR objectives.

Indicators of change were selected through a comprehensive review of available institutional data. Through this review and examination, the following six desired characteristics for institutional data were identified as key criteria to inform the selection of indicators of change that support progress tracking and evaluation in the context of StEAR over time and particularly in this first year:

- **Availability:** existing/already collected or feasible to collect now or in the future
- **Accuracy:** specific and representative (not too small a sample size)
- **Comparability:** across population groups (e.g., students, staff and faculty), contexts (e.g., unit/dept, faculty/portfolio) and time (can establish a trend)
- **Simplicity:** ease of interpretation, minimize caveats and nuances that need explanation
- **Reliability:** validated data collection tool and/or measure, when possible
- **Efficacy:** useful and meaningful (evaluative) indicator of change

There is no expectation that any one indicator will meet all six criteria, rather the criteria are useful guideposts for characterizing the utility of different datasets and indicators. In some cases, the desired measures have been identified but the data infrastructure to collect, appropriately analyze and report on them is still in development. In this first year of implementation, a limited set of currently available outcome measures have been identified, with plans to expand this set in the coming years.

Each indicator of change is associated with one or more StEAR objectives and consists of a number of sub-components:

- **Outcome measure:** a specific data point that can be compared year on year to track progress.
- **Reference point:** a specific target or anticipated change identified for each outcome measure. Where possible, comparator data is provided to contextualize UBC's institutional goals.

Depending on comparator data availability, each indicator of change also has either:

- **Indicator:** the differential from the reference point, where the comparator data, either from external sources or from UBC historical trends, is available, or
- **Baseline:** establishes a baseline for subsequent years' reporting where the comparator data is not yet available.

For example, the compositional diversity of the UBC workforce is an **outcome measure** that relates to StEAR Roadmap Objective 3.1 (about hiring processes). The **reference point** is parity with (or better than) representation of [employment equity federally designated groups in the national workforce](#). For 2024, comparator data is available, so the **indicator** identifies which groups have higher, lower, or aligned representation at UBC compared to the national workforce.

[Status of institutional strategic actions \(central system interventions\)](#)

StEAR's intended institutional-level systems interventions are articulated in the 135 strategic actions of the *StEAR Roadmap for Change*. Through ongoing consultation and continuous engagement, the EIO identified appropriate sponsors, leads and partners to drive forward implementation of the strategic

actions, as well as identifying whether the actions would be appropriately implemented through a shared process for both of UBC's campuses, or whether they pertained to systems and processes that run separately at each campus.

To gather information on the implementation of strategic actions, EIO project managers liaise with the leads of each strategic action. In consultation with strategic action leads, each action is assigned one of the following status categories:

- **Not Yet Started:** This status indicates that work on the strategic action has not begun, for example due to resource or operational constraints. The EIO will work collaboratively with the leads of these actions to determine what supports are required to advance the work.
- **In Progress:** This status signifies that the leading/co-leading units are actively advancing the strategic action.
- **Completed/Ongoing:** Actions with this status have achieved their primary objectives yet may require ongoing attention to maintain the impact and/or address evolving needs and challenges. Actions with this designation may be updated or re-framed to enable more efficient progress reporting in future years.
- **On Hold:** This status indicates that work on the strategic action has been temporarily paused. This can be due to external dependencies or strategic shifts. Actions on hold are not actively being worked on but may be resumed once the reasons for the pause are addressed.

In aggregate, the results of this exercise provide a picture of the extent to which StEAR's intended systems interventions are being enacted.

[Inventory of unit-level activities \(decentralized interventions\)](#)

A wide range of decentralized interventions to advance EDI and anti-racism are being implemented within UBC's faculties, vice presidential portfolios, units, and departments. To build a picture of the types of initiatives underway and how they align with the StEAR Framework, we developed the *StEAR Inventory: Mapping UBC's Decentralized EDI Practices & Initiatives*.

Each objective of the StEAR Roadmap was expressed as an area of focus relevant at the decentralized department/unit level. For each objective, inventory participants were asked to provide:

- (Required): The status of their engagement in this area of work (e.g., not started, planning, underway, completed/sustainment)
- (Optional): A short description of their recent or ongoing initiative in this area
- (Optional): Initiative contact information, if different from the Inventory contact
- (Optional): Any challenges or barriers that prevent or hinder work in this area
- (Optional): Any additional comments or explanation in relation to above answers

Because participation in the inventory was not mandatory, we do not expect the results to be a representative sample of UBC's decentralized units and departments. Inventory respondents are likely more highly engaged with EDI and anti-racism work. The results, therefore, provide a picture of

engagement and barriers faced by decentralized EDI champions and leaders who likely have an above-average commitment to advancing EDI and anti-racism at UBC.

Strategic learning (continuous assessment)

Gathering information for strategic learning requires continuous assessment, reflection, and dialogue with StEAR governance bodies, implementation partners, and EDI champions and communities of practice undertaking this work. The information exchange and feedback loop we establish is critical for making sense of how the work is unfolding and what is helping or hindering progress. Through these mechanisms, we continually update our understandings of changing contexts and conditions and surface insights about the benefits and drawbacks of our strategies.

References

Cabaj, Mark. 2019. Evaluating Systems Change Results: An Inquiry Framework. Tamarack Institute. Retrieved

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