

Diversity and Inclusion Charter of Peel

Phase 2 Evaluation Report: Executive Summary



This report presents the findings of an evaluation of Phase 2 of the Diversity and Inclusion Charter of Peel, which is a regional initiative hosted by the Regional Diversity Roundtable of Peel. The Charter articulates a vision for diversity and inclusion in Peel through a shared vision statement and a list of concrete commitments. The Charter is not aimed at a single sector, but designed to apply to any organization or group, including governments, private businesses, planning tables, non-profit organizations, and grassroots groups. It promotes cross-sectoral collaboration and collective action as well as change within individual organizations.

The work of the Charter is important, because Peel Region is one of the most culturally diverse communities in Canada. The challenges of creating inclusion and equity are compounded in Peel Region because it is a cluster of large communities that are growing and changing very quickly. Local institutions, businesses and small community groups need to adapt quickly to this changing context, and the Charter acts as a high profile point of reference – a shared public statement about the importance of Diversity, Equity and Inclusion work, and the need to work together.

During Phase 2, the Charter developed a theory of change that identified three high level areas of action:

- building the charter community;
- identifying best practices, resource sharing, and supporting implementation, and;
- assessment, partnerships and recognition.

The Main Message

The Diversity and Inclusion Charter of Peel began Phase 2 as a set of important, bold ideas, but completes it as a living, growing network. The Charter, at its core, is an ongoing community conversation, with a large and diverse group of supporters, and a willingness to draw members into discussion of important and challenging questions. Without question, the Initiative has raised awareness and built the Charter community during Phase 2. Some important progress has been made in equipping organizations to act, although the process has not proven to be simple or linear, and much remains to be done, especially with respect to collective action. The process of tracking progress and celebrating success is only just beginning. However, the creation of the Self Assessment Tool in Phase 2 leaves the Charter well positioned for success in this action area moving forward.

Approach to Evaluation

The evaluation of the Charter's work in Phase 2 took a developmental approach. An evaluation committee played an active role in the process. Findings were presented and discussed frequently, and the evaluation design adapted to what was being learned. The evaluators played an active role at community forums, gathering feedback and sharing results. The key evaluation methods were:

- Key informant interviews
- Pilot testing of the Diversity, Equity and Inclusion Self Assessment Tool
- Ongoing tracking of signatories, contacts and event attendees
- Feedback surveys at all community events
- An online survey of the Initiative's entire network

Phase 2 of the Diversity and Inclusion Charter of Peel was funded by a grant from the Collaboration Funding Stream of the Community Investment Program of the Region of Peel. It is hosted by the Regional Diversity Roundtable of Peel. Members of the Steering Committee are the Brampton Library, the Credit River Metis Council, the Peel District School Board, the Peel Multicultural Council, and the William Osler Health System. This evaluation report was completed by Taylor Newberry Consulting.

Findings About the Initiative's Evolution Over Time

- January 2015: Launch of Phase 2 & First Community Forum.** This well attended event launched the second phase and sought input from the community about how the Charter could be used to make real change in the policies and practices of local organizations. Participants emphasized the importance of ongoing outreach. Measurement, accountability and recognition were also key themes in the discussion.
- February 2015: Development of Theory of Change.** The Initiative drafted a theory that included three key areas of action and a number of intended outcomes. It also highlighted the Initiative's flexible and organic approach and set the stage for the development of key evaluation questions and methods.
- April 2015: Drafting the Self Assessment Tool & Second Community Forum.** Work on the SAT was initiated by the RDR before Phase 2 started. In April, the evaluators and the evaluation committee members completed a revised draft version. It identified 8 domains in which an organization should take action in order to make meaningful progress on Diversity, Equity, and Inclusion. The survey items began to operationalize the Charter's key concepts in a way that prompted more discussion about pathways to action. A second community forum gave members of the network an opportunity to participate actively in the development of the tool. Feedback at this event led to the creation of an SAT action planning guide and more detailed instructions for use.
- May 2015: Outreach and Engagement & Third Community Forum.** In response to feedback from the network, this forum reached out to individuals who were not representatives of organizations, and explored the ways in which the Charter might support their personal efforts to advance Diversity, Equity, and Inclusion.
- June 2015: Pilot Testing of SAT and Community Forum 4.** Five organizations volunteered to formally pilot test the draft SAT, and a number of conference attendees also filled it out. Feedback from both groups led to a revised version and provided new insight into how different kinds of organizations draw on the Charter in order to make change.
- September 2015 – February 2016: Webinars.** In September, November, and February, the Initiative hosted webinars intended to provide network members with tools and resources to take action on Diversity, Equity, and Inclusion. These sessions responded to an expressed need for practical resources and support. Each webinar featured guest presenters able to talk about making change within their own settings. The Initiative wrote up practice briefs on the content covered in each webinar.
- October 2015: Reflecting on the Theory of Change & Community Forum 5.** The theory of change developed early in the year became an ongoing planning tool for the Initiative. This session gathered feedback on the work to date, and re-engaged signatories and supporters. It also trained participants in how a theory of change could be used to become more impact-focused while at the same time remaining adaptive and holistic.
- January 2016: Planning for Next Steps.** The Initiative developed plans for next steps and submitted two proposals for funding. These ideas reflected the lessons learned during Phase 2 in important ways. Plans include translating the Charter into 10 languages and developing a program that will coach individuals from various linguistic communities as they take action. Plans also include using data from the Self Assessment Tool and other sources to develop a community level report card on Diversity, Equity, and Inclusion issues.
- February 2016: Launch of Final SAT and Website.** In February, the final version of the Self Assessment Tool will be publicly released and a revamped website will be launched.

During Phase 2, the Charter successfully implemented its original work plan. However, the timeline shows how the work was also informed by the input received at each forum. The theory of change was a response to questions raised at the first forum about how the Initiative intended to make meaningful change. The first forum informed the content and format of the Self-Assessment Tool as well. Topics chosen for the webinars and practice briefs reflected this input.

"The exercise [of completing the SAT] has been worthwhile and thought-provoking. The document has highlighted several strengths and opportunities and it has 'forced' us (outside of the Equity and Inclusion portfolio) to think about where we still need to do some work and how that work will be achieved/measured." – pilot test participant.

Findings about the Initiative's Outcomes

Building the Charter Community: During Phase 2, the Diversity and Inclusion Charter of Peel reached out to a wide range of people and organizations, using a variety of communication channels. A large number of people from several different sectors of the community participated, and several important new groups signed the Charter. Evaluation findings show that participants found the experience very meaningful. They saw the Charter as a crucial resource for raising awareness about Diversity, Equity, and Inclusion in the Region. As a result of the Charter's efforts, many conversations about Diversity, Equity, and Inclusion have been initiated, and this is important progress.

Identifying Best Practices, Resource Sharing and Supporting Implementation: Evaluation findings suggest that participating organizations have made use of the information provided through the Initiative in a variety of ways. Some of these uses, such as posting the Charter on a bulletin board or starting an informal conversation at a board meeting, were small and informal. Others were more significant. The Charter was also used to add credibility to action that had already been taken within an organization, or to plant seeds for a discussion about future action (during the organization's next round of Strategic Planning, for example). Key informants felt that all of these uses were important. Findings also highlighted some of the obstacles that organizations face in implementing Diversity, Equity, and Inclusion strategies. Many members of the Initiative's network work in large organizations where they have limited decision-making power and change happens gradually. Others work in very small organizations, or in places where the leadership is only beginning to learn about Diversity, Equity, and Inclusion issues. These network members may need a different kind of support as they work to take action within their spheres of influence. Many participants asked the Initiative to provide them with more practical guidance about taking action. Beginning in the fall of 2015, three webinars were completed in response to these requests. They were intended to provide very concrete and practical guidance about taking action.

The Charter Initiative was designed to encourage collaborative action as well as change within individual organizations. While the Charter is itself a form of collective action, and the community forums have provided opportunities for good cross-sectoral discussion, evaluation findings do not suggest that the Initiative has catalyzed significant systemic change to date. Plans for Phase 3 build on the lessons of Phase 2 in this regard.

Assessment and Recognition: The Charter Initiative's third action area focused on helping organizations to assess progress over time and celebrate their achievements. The Self Assessment Tool developed during Phase 2 shows promise as a tool that organizations can use to begin tracking progress and improving over time. Plans for Phase 3 focus on leveraging this resource to make further progress on this outcome.

Recommendations

Based on these findings, the evaluation report includes a number of recommendations. Highlights are summarized here.

- The meaning of signing the Charter, for individuals and for organizations, should be clarified. It should be made clear that endorsing the Charter is a public act, and a commitment to use consistent, strong language when talking about Diversity, Equity, and Inclusion.
- Promotion of the Charter should emphasize the importance of the very early stages of change, recognizing that the specific type of action and the pace of change may vary greatly across organizations.
- The Initiative should continue to mine the SAT and the expertise of network members in order to create simple, accessible resources for organizations that are unsure how to act.
- Promotion of the Charter should focus more widely on organizations outside of the not-for-profit and public sectors. Outreach should focus on groups that support people who experience exclusion because of gender, sexual orientation, disability or other factors.
- The Charter should review its governance structure in order to clearly identify where and how collaborative, systems level planning can take place, and how decision making can be made as transparent and inclusive as possible.
- A large-scale survey of the people connected to the initiative, like the one that was attempted in December, should be an annual component of ongoing evaluation.

