Diversity Education for Change:
A Guide to Planning and Management

PLAN:NET LIMITED
DEVELOPMENT PLANNING AND MANAGEMENT NETWORK

Alberta
COMMUNITY DEVELOPMENT
Human Rights, Citizenship and Multiculturalism Education Fund

Canadian Heritage / Patrimoine canadien

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This Guide was produced by Plan:Net Limited with funding from the Human Rights, Citizenship and Multiculturalism Education Fund, Alberta Community Development, and the Multiculturalism Program of the Department of Canadian Heritage.

Library and Archives Canada Cataloguing in Publication

Diversity education for change : a guide to planning and management / Jennifer Adkins ... [et al.].

Includes bibliographical references.
ISBN 0-9736507-0-2

1. Multiculturalism--Study and teaching. 2. Human rights--Study and teaching.
3. Racism--Study and teaching. I. Adkins, Jennifer Nora, 1967-

LC1099.D583 2004 323'.071
C2004-905770-7

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Published by:

PLAN:NET LIMITED
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Graphic design and layout by Re:Design, Edmonton, Alberta, Canada

Printed and bound in Canada

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Acknowledgements

We would like to thank the organizations that participated in the project for their valuable contribution. We are also grateful to the members of the Project Steering Committee and Tool Review Committee for their guidance and input in this process. It is our hope that this Guide contributes to a strong and vibrant diversity education sector in Canada.

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Alberta Civil Liberties Research Centre – www.aclrc.com
Alberta College of Art and Design – www.acad.ab.ca
Alliance Jeunesse Famille de l'Alberta Society – www.ajfas.ca
Calgary Police Service, Cultural Resources Unit – www.calgarypolice.ca
Catholic Social Services – www.catholicsocialservices.ab.ca
Central Alberta Diversity Association – www.mycommunityinformation.com/cada
Central Alberta Immigrant Women's Association – caiwa@rttinc.com
Committee on Race Relations and Cross-Cultural Understanding – www.crrccu.org
Millwoods Multicultural Council Foundation – www.incentre.net/mmcf
NAPI Friendship Association – www.albertafriendshipcentres.ca/pincprog.htm
Northern Alberta Alliance on Race Relations – www.naarr.org
Southeastern Alberta Racial and Community Harmony Society – www.memlane.com/nonprofit/search

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Background

The Diversity Education Research Project (DERP) was a research and capacity building process carried out by Plan:Net Limited with organizations from across Alberta, each with diversity education mandates. This project ran from January 2002 until September 2003, with funding and ongoing support from the Human Rights, Citizenship and Multiculturalism Education Fund, Alberta Community Development, and the Multiculturalism Program of the Department of Canadian Heritage.

The purposes of DERP were to:

- document and share effective diversity education practices
- build the capacity of the organizations to implement an outcomes measurement planning and management system for their diversity education work
- document the results of the process
- encourage other organizations to integrate this knowledge into the design and management of present and future diversity education work

Three key results emerged at the end of the project:

- a growing body of knowledge about successful diversity education practices
- new organizational capacity among the participating organizations to plan, manage, and report on their diversity education work
- a draft set of diversity education project planning and management tools

For more information about DERP, please refer to the **Literature Review** and **Final Report**. (See page 92 of *Useful Resources*)

Plan:Net Limited conducted a second phase of the project to test, refine, and package the project planning and management tools for widespread distribution.

The second phase involved working with:

- the project Steering Committee
- a Tool Review Committee, comprised of members from across Alberta, Saskatchewan, and Ontario with expertise in diversity education and pedagogy
- seven testing organizations engaged in diversity education work

Diversity Education for Change: A Guide to Planning and Management is the result of the two phases of the project.

Introduction to the Guide

Welcome to **Diversity Education for Change: A Guide to Planning and Management**. We hope you will find this Guide useful for your group, organization, or institution as you design and deliver your project.

Plan:Net Limited has worked for a number of years in the areas of Outcome Measurement and diversity with a broad spectrum of community groups, non-profit agencies, and institutions. This Guide builds on the questions, suggestions, and learning we have collected through our experience as trainers and facilitators.

This Guide contains eight tools to help your group be successful in your diversity education work. The tools can be used by individuals as a quick reference, but they work best when they are used to guide a group discussion. These tools are designed to help you plan, monitor, evaluate, and report on your project. They represent one approach to project planning and management. There are many other approaches that you may also find useful.

The eight tools are a collection of guided processes. They pose relevant questions, and suggest options. These tools are:

- **Tool 1:** Building Your Project Idea
- **Tool 2:** Locating Your Project in the Wider Field of Diversity Education
- **Tool 3:** Drafting an Outcome Measurement Framework
- **Tool 4:** Identifying Outcome Indicators
- **Tool 5:** Assembling a Data Collection Plan
- **Tool 6:** Preparing a Diversity Education Proposal
- **Tool 7:** Sorting, Compiling, and Analyzing Your Data
- **Tool 8:** Reporting Your Outcomes

If you are submitting a proposal for funding, Tools 1 - 5 will help your group develop a detailed plan. Tool 6 assists you in presenting your plan in a proposal.

Once implementation begins, you will want to revisit with your project team:

- the development of your project idea (Tools 1 and 2)
- your Outcome Measurement framework (Tool 3)
- your outcome indicators (Tool 4)
- your data collection plan (Tool 5)

A review of these steps will ensure that your entire project team fully understands the project, and that your plans still make sense in view of any changes since the proposal was written. At that point, you will want to use Tools 7 and 8 to help you think through data analysis and reporting.

We encourage you to photocopy the tools so that you can use them more than once.

Where Can You Get This Guide?

This Guide and electronic versions of the worksheets can be downloaded at:
www.gov.ab.ca

A limited number of hard copies of the Guide are available from:

Alberta Community Development
3rd Floor, 525 11 Avenue SW
Calgary, Alberta T2R 0C9
Phone: 403-297-8497
Email: Educationfund@gov.ab.ca

Canadian Heritage
First Street Plaza
Suite 310, 138 - 4th Avenue SE
Calgary, Alberta T2G 4Z6
Phone: 403-292-5541

What Is in This Guide for Your Group?

On the next page is a self-test to see which tools will be most helpful to your group. If you answer *No* or *Unsure*, the tools listed in the third column will be helpful to you.

SELF-TEST		
Does your group have:		
A clear sense of direction?	❑ Yes ❑ No ❑ Unsure	Tool 1: Building Your Project Idea
Clear action priorities in your community?	❑ Yes ❑ No ❑ Unsure	Tool 1: Building Your Project Idea
A project idea that fits with these priorities?	❑ Yes ❑ No ❑ Unsure	Tool 1: Building Your Project Idea Tool 2: Locating Your Project in the Wider Field of Diversity Education
Agreement on the change it wants to bring about through the project?	❑ Yes ❑ No ❑ Unsure	Tool 2: Locating Your Project in the Wider Field of Diversity Education
An Outcome Measurement framework that connects the resources you need, the activities you will carry out, and the outcomes you will achieve?	❑ Yes ❑ No ❑ Unsure	Tool 3: Drafting an Outcome Measurement Framework
Indicators that point to the information you need to show that change has occurred?	❑ Yes ❑ No ❑ Unsure	Tool 4: Identifying Outcome Indicators
A plan to gather evidence of the changes your project is making?	❑ Yes ❑ No ❑ Unsure	Tool 5: Assembling a Data Collection Plan
A way to put all this information into a project proposal?	❑ Yes ❑ No ❑ Unsure	Tool 6: Preparing a Diversity Education Proposal
A process to convert your data into useful information?	❑ Yes ❑ No ❑ Unsure	Tool 7: Sorting, Compiling, and Analyzing Your Data
An idea of how to report on your activities and outcomes?	❑ Yes ❑ No ❑ Unsure	Tool 8: Reporting Your Outcomes

As you can see, the tools cover everything you need — from deciding on priorities to monitoring the project once it's underway — and provide help with putting together a final proposal. You may not need to use all the tools, but if you have questions or worries about your project, then one or more of these tools may help. That said, the tools do build on each other, and it is worthwhile to review them all.

The introduction to each tool includes:

- its purpose
- a description of the tool
- when to use it
- how to use it

See *Useful Resources* on page 91 of this Guide for a list of resources that you may find useful. These resources are categorized into two major groups: Diversity Education resources and Outcome Measurement resources.

Terminology

Terminology can be tricky. In this Guide, we use the following terms to encompass these meanings:

- **Diversity Education**
  This includes diversity, multicultural, race relations, human rights, and anti-racism education.
- **Group**
  This includes community groups, non-profit organizations, working committees, task forces, working teams, coalitions, institutions, and corporations.
- **Project**
  This includes an event, initiative, program, effort, and campaign.
- **e.g.**
  This is an abbreviation that means *for example*.
- When we use the singular, this includes the plural as well.

This terminology is based on the **Diversity Education Literature Review** conducted in 2002. Terminology varies in different organizations, and for different funders. You will want to use whatever terms make the most sense for your group and situation.

For more information on the terminology often used in the field of Diversity Education, see the glossary at: www.diversitywatch.ryerson.ca.

Getting Clear on Outcome-based Planning and Evaluation

Outcome Measurement is an approach to planning, managing, and evaluating projects that encourages groups to be clear about what their projects are ***doing*** and what they are ***changing***. Outcome Measurement has a variety of names. You may know it as Managing for Results, Results Based Management, or Performance Management. More and more funders are requiring groups to submit outcomes-based proposals and reports.

Outcome Measurement comes with its own set of terms. The most important terms are:

- inputs
- activities
- outputs
- short-term outcomes
- intermediate outcomes
- long-term outcomes

These terms fit on a logic chain that starts with resources, which combine with activities to create a series of changes in individuals, families, workplaces, communities, or even societies.

Another key term is indicator, which refers to the information you need to gather to show the change you are trying to create.

A simple way to understand the world of Outcome Measurement is through an image or metaphor:

Imagine what happens when a rock is dropped into a pool.

Think of the rock as a *material input*, and the person holding the rock as a *human resource input*.

The act of dropping the rock is an *activity*. When the rock reaches the water, it creates a ***splash***. These are your *outputs*.

The ***ripples*** spreading out from the splash are your *outcomes* — short-term, intermediate, and long-term.

The edge of the pond represents the geographic and population boundaries of your project.

There are five guiding ideas inside this image:

- **Time**

  Splashes (outputs) become ripples (outcomes), which move outward over time. The idea is that outputs are immediate, and flow directly from activities. Short-term outcomes are closely linked to outputs. They describe the related potential generated by the activity and its output. Intermediate outcomes take the lifetime of your project to show, and are at least one step removed from activities. Long-term outcomes take longer than the life of your project to show, and are many stages removed from activities.

- **Sphere of Influence**

  Splashes cover a smaller area than ripples do. This suggests that an activity and its output involve a relatively small number of people; however, just as a splash yields ever-widening ripples, the benefits of the activity and its output spread beyond the initial group of participants to include other people. It is in this ripples zone that a project generates important social changes.

- **Control**

  As splashes become ripples, your control diminishes. You have considerable control over inputs, activities, and even outputs up to when the splash occurs in the pond, but after that you have less and less control.

- **Context**

  The ripples (outcomes) take their own course, affected by other disturbances in the pond. You can influence the ripples that are closer to the original splash. To use this influence, you must know how to deal with the disturbances, such as opportunities and obstacles.

  At the outer edges of the pond, where the ripples are wide and distant from the splash, your influence has diminished further. Here, at the level of long-term outcomes, all you can do is contribute to the big picture and the long-term changes you seek.

- **Learning and Improvement**

  Every splash and ripple sequence is an experiment. The more you know about the *splash and ripple* effect of your project, the better able you will be to add to or alter your inputs and activities to yield better results. Using the image: you can drop the rocks in differently by dropping in bigger rocks, by dropping in fewer or more, or by dropping the rocks at different times.

What Do We Know about Good Practice in Diversity Education?

Here are some insights gathered from our study of successful diversity education projects.

DESIGNING

- **Vision**

  Successful change is sparked by a larger vision of a more positive future, and a critical examination of the values and processes needed to get to that future, one change at a time.

- **Context**

  Projects begin with a realistic assessment of the capacity of the group and the needs of the community. Coordination with, and building upon, other community efforts provides more momentum for change.

- **Participation**

  Involving as many stakeholders as possible throughout the project is very important. Understanding who key stakeholders are, and building relationships as early as possible, are critical to success.

PLANNING

- **Planning**

  Plan what you are going to do, based on what you are trying to change. This means having clarity of purpose: a clear and articulated focus for what you will do, the changes that you intend to see as a result, and why these changes are important.

- **Representative Participation**

  Ensure participation and commitment by including in the planning phase all those who may affect, or be affected by, your project. It is critical that you get the participation and commitment of those with power and authority – those who ultimately make decisions that will make or break your project.

- **Long-term Commitment**

  Change is a process, not an event. Plan for, and allocate, the required time and resources you need to be successful. On-going support, capacity building, and patience are essential in order to demonstrate evidence of changes brought about by your project.

PLANNING, continued

- **Knowing Your Audience**

  This involves identifying a target audience, and knowing how to get the attention of that audience. It also means knowing the needs of the participants, and where they are on the Change Continuum (see page 11 of this Guide). Similarly, use teaching methods appropriate to your participants, recognizing that different people learn in different ways.

- **Assessing Collective Capacity**

  As well as assessing the skills and abilities of individuals in your group, it is also necessary to assess the capacity of the group as a whole. Group capacities such as the ability to communicate effectively, share authority, resolve conflict, and learn from experience are important project strengths.

- **Flexibility**

  There is no one-size-fits-all model that can be applied to diversity education. The focus of the project, and the directions it takes, must be determined by the interests, issues, and desires of the audience, group, and community.

MANAGING

- **Follow-up Support**

  Follow-up support is critical in assisting individuals to change. People benefit from coaching, mentoring, ongoing education, and support in order to sustain new attitudes and behaviours. Attending a one-time event without any follow-up is unlikely to change an individual's behaviour.

- **Capacity Building**

  Ongoing support is also necessary to build the capacity of the family, organization, or community in the individual's environment. A critical area of capacity building for groups is learning how and when to work collaboratively and to build coalitions.

- **Clear and Consistent Messages**

  All communications must have clear and consistent messages that are repeated throughout the project. It is important that the individuals within the group model the values inherent in the messages. If inclusion is a value and a message of the project, real stakeholder participation and shared decision-making are necessary to properly promote that value.

MONITORING and EVALUATING

- **Finding Out What Works**

  When all is said and done, the only way to know what works, and why, is to monitor and evaluate your project. Building in an effective monitoring and evaluation system can help you celebrate successes and build on momentum.

The Change Continuum

An understanding of how change occurs is essential when planning your project. The following Change Continuum can help groups to identify what kind of change they are trying to create.

Awareness → Knowledge → Attitudes → Behaviours

It is a continuum where one stage flows into another; the separation between the stages is not clearly defined. The continuum can also be seen as a spiral, since people tend to fluctuate between stages, and continually re-enter the continuum as their awareness and knowledge grow, and their attitudes and behaviours change. Although change is more complex, the continuum is still useful when describing our projects.

Use the chart on the next page to identify the types of change you want from your project.

THE CHANGE CONTINUUM

Awareness → **Knowledge** → **Attitudes** → **Behaviours**

Awareness Stage

Projects attempt to stimulate or heighten awareness of an issue that exists, and that something must be done to improve the situation. The issue may be:

- untapped potential, such as a lack of appreciation for all the perspectives that diversity can bring, or a lack of understanding of other cultures
- a threat to stated values, such as justice, fairness, peace, democracy, and equality
- a threat to certain groups in our society, such as ethno-cultural groups, women, homosexuals, and people with disabilities

Knowledge Stage

Projects provide information on:

- the various aspects of the issue, and how it affects our lives and relationships
- the perceived barriers to, and benefits of, change
- opportunities to increase knowledge or make connections

Attitude Stage

Projects attempt to change perceptions of the issue by:

- stimulating dialogue and debate
- presenting possible alternatives and solutions
- emphasizing the benefits of change
- providing social support for new perceptions

Behaviours Stage

Projects are:

- presenting alternative ways to behave
- providing information on how and when to behave differently
- building skills through training
- providing social support for new behaviours
- legislating changes in behaviour

The *Awareness* and *Knowledge* stages focus on developing a readiness for positive change. The *Attitudes* and *Behaviours* stages focus on encouraging and sustaining these positive changes and actions.

There is a distinction between imposed and voluntary changes in behaviour. Voluntary changes in behaviour are evidence of shifts in awareness, knowledge, and attitudes, and proof that an individual, organization, or system has adopted these shifts as part of its way of being. In the case of imposed changes of behaviour, such as through human rights legislation, it is essential to work on the other stages so that the changes become part of our social fabric and values. Failure to do so can result in reversions to past behaviours. Arguably, it is easier to change behaviours than it is to change attitudes. Changing attitudes requires shared experience and understanding among peoples of diverse backgrounds.

The Change Continuum can be applied to changes at individual, organizational, or systemic levels. All three levels must be addressed to bring about sustained societal change. Change projects can be started at any point along the continuum.

Contact Us

It is our sincere hope that this Guide is inclusive, clear, and useful. If you have any feedback or suggestions for improvement, please email us at plannet@plannet.ca. We would be happy to hear from you.

Notes

This section is excerpted from **Diversity Education Research Project: Literature Review**, April 2002.

The Change Continuum is adapted from ideas in:

- Anderson, Beverley, InSites: A Support Network for Educational Change, Continuum of Systemic Change, http://www.stemnet.nf.ca/DeptEd/Program/TILE/apdxf.html
- The Communication Initiative, Change Theories — Audiences along a Behavior Change Continuum: Possible Communication Strategies, http://www.comminit.com/ctheories/sld-2911.html
- Department of Canadian Heritage, Multiculturalism Program Outcome Measurement Framework, internal document, 2001. Health Canada, Guide to Project Evaluation, a Participatory Approach, http://www.hc-sc.gc.ca/hppb/phdd/resources/guide/defining.htm
- North Central Regional Educational Library, A Model of Change in Science and Math Education, http://www.ncrel.org/mands/docs/5-10.htm

Notes

Tool 1: Building Your Project Idea

Purpose

To help your group establish a project idea, and think about how it fits with your organization, the community, and its needs.

Description

This tool uses a series of guided questions in a four-step process to help your group generate and analyze a project idea, research and validate the idea within your community, and revise the idea.

When To Use

- Prior to beginning any new project
- When establishing or clarifying future directions
- When determining how your project fits with work already taking place in the community

How To Use

Go through the four steps in this tool with your planning team. Consider all the questions listed in each step.

For Step 1, you may want to use a flipchart to capture your ideas.

Steps 2 and 3 will require a thorough discussion of your group's capacity, experience, and successes, as well as your external environment. You may want to ensure that key decision-makers and people who know the history of your group and community are included in these discussions.

When discussing a proposed project idea with members of your community, you will want to emphasize that you are at the early stages of planning. It is important not to raise expectations, in case the project is not implemented for one reason or another.

In Step 4, document the revised project idea that has emerged from Steps 1, 2, and 3, using the worksheet provided.

BEGIN TOOL 1 HERE

Step 1: Generating Your Project Idea

The first step is to identify the issue you wish to address in the community, and brainstorm what you would like to change, and how.

Consider the following questions:

1. What are the issues and opportunities in your community that can be addressed through some form of diversity education process?

2. What changes do you envision? What would it look like if the issue were resolved?

3. What change can your group realistically bring about?

4. What types of activities could your group offer that would contribute to that change?

Step 2: Analyzing Your Project Idea

Now it is time to analyze your project idea. To do this, you need to look at your own organization and at your community.

1. Looking at Your Organization

   Who are you?
   - What are your strengths and abilities?
   - What skills and knowledge do you have?
   - What do you do well?
   - What successes have you had in the past?
   - How does this project idea draw on what you do well?
   - What challenges exist within your group that need to be addressed?
   - How do you model the values that you are promoting in this project?

   What is your vision and mission? (See box below)
   - How does this project idea fit with your organization's vision and mission?

What Is a Vision?

A *vision* explains what success would look like if your organization achieved its purpose.

Use a vision to:
- provide direction and purpose
- encourage unique ideas and solutions
- build commitment and excitement
- build ownership and loyalty

What Is a Mission?

A *mission* explains how your organization will go about achieving its purpose.

Use a mission to:
- define the purpose and target population
- describe the primary means of achieving the purpose
- list the values and guiding principles shared and practiced by your organization's members

What are your resources?

- What are the resources (time, talent, money) required for the project, and do you have them?
- If not, what do you have to do to get the resources? Is it worth the effort?

2. Looking at Your Community

- What community opportunity or issue do you want to address?
- What do you hope to change?
- Who else is trying to work with the community in this area, and how would your project fit with theirs?
- What community support will you have?
- What resistance will you encounter?

Step 3: Researching and Validating Your Project Idea

To finalize your project idea, answer the following questions.

1. What other projects like this have been done in your community or elsewhere? What can you learn from their successes and challenges (for example, from the web, project funders, project reports, and project staff)?

2. Who in your community needs to provide input into this project idea?
   - Who else is working on this issue?
   - Who is directly affected?
   - Who could provide resources?

3. How will you approach these different groups to get their input? (See box below)

> **Consult with the Community**
>
> Consider having informal conversations, holding Brown Bag Lunches, or holding Town Hall meetings with those involved to hear what the community and stakeholders have to say regarding the issue.
>
> Their perspective of the issue may give you guidance in designing your project idea. The process of consultation may help to build support for your project.

4. How are these groups affected?

5. What would these groups like to see happen?

6. What is the reaction to your project idea? What suggestions are there to improve it?

7. How will the community support your project?

Step 4: Stating Your Project Idea

With your group, review your project idea. These questions can help your group take stock of your original project idea in light of the analysis you have done.

- What is the connection between the opportunity or issue you wish to address and your project?
- If your project is successful, what will have changed in the community? Does this change address the issue? If so, how?

Use the Tool 1 worksheet on the next page to state your project idea, answering all the questions provided.

PROJECT IDEA

1. Why do we want to do this?

2. What will we do?

3. How will we do it?

4. What will change as a result of our project?

5. Who will we work with?

6. What resources will we need?

Tool 2: Locating Your Project in the Wider Field of Diversity Education

Purpose

To help your group reflect on the range of activities in the field of diversity education, and clarify what changes are possible as a result of your proposed project.

Description

This tool is a three-step process that will help your group consider the types of change that you can expect to achieve with the type of project you have identified. It will also help you to see how your project will contribute to larger social change. This larger view will prepare you to develop an Outcome Measurement framework in Tool 3.

When To Use

When you have a solid idea of the kind of project you want to carry out, and are confident that the project is a good fit for your group and community.

How To Use

In Step 1, examine the diagram that describes the field of diversity education. Reflect on where your project fits.

In Step 2, look at the four types of diversity education projects in the boxes. Review the information, and decide whether or not your project fits into each category. Discuss whether or not you will be able to achieve your desired changes with the activities that you are planning.

In Step 3, take stock of your discussions to date, and refine your project idea, using the questions in the Tool 2 worksheet as your guide.

BEGIN TOOL 2 HERE

Step 1: Exploring the Field of Diversity Education

The diagram on the next page illustrates the broad field of diversity education.

Go to the middle of the diagram on the next page. Read the long-term outcome statements listed there. Reflect on the big-picture changes to which diversity education can contribute.

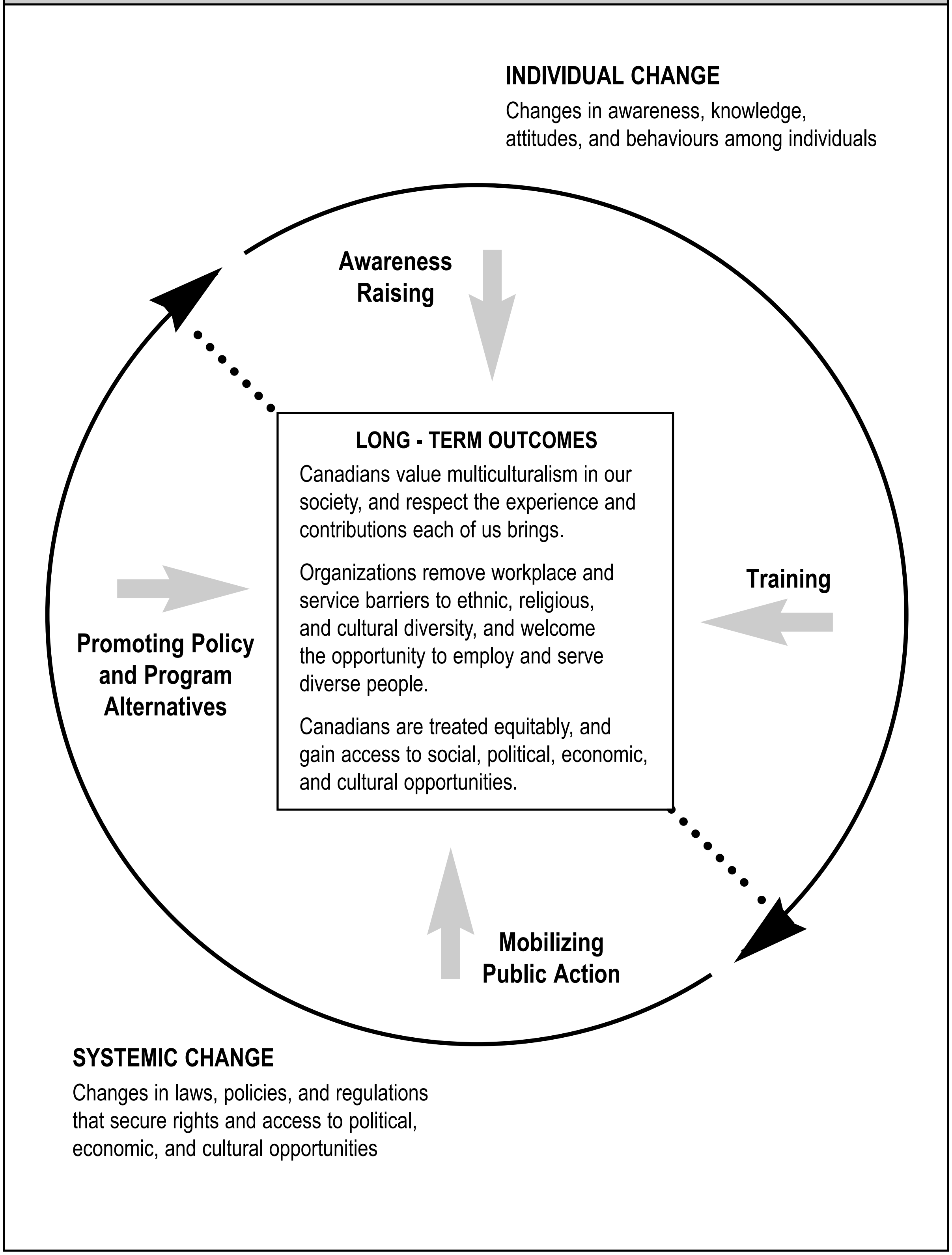
Review the statements on either side of the circle. These statements help to differentiate diversity education programs according to whether they are focused on individual or systemic change.

In the domain of individual change, projects attempt to move people along the Change Continuum from awareness to changes in behaviour.
(See discussion of Change Continuum on page 11)

In the domain of systemic change, some projects concentrate on mobilizing larger numbers of people to promote and support change, while others concentrate on research and policy change.

Consider how individual and systemic change are mutually reinforcing.

THE FIELD OF DIVERSITY EDUCATION



Step 2: Relating Your Project Idea to the Field of Diversity Education

Discuss your project idea in relation to the diagram on page 23. Look at the information, and answer the questions in the boxes below. Each box relates to one of the main project types:

- Awareness Raising
- Training
- Mobilizing Public Action
- Promoting Policy and Program Alternatives

Depending on your proposed activities, your project may fit into more than one category.

Individual Change Focus Projects: AWARENESS RAISING	
Characteristics:	• Single events open to members of the public • Participants drop in.
Examples:	Public awareness campaigns, festivals, documentaries, photograph exhibits, poster competitions, concerts
Considerations:	• Potential to reach large numbers of the public • Participants are difficult to contact outside of the event, unless they register.

Does your project fit in this category?

❑ Yes ❑ Partly ❑ No

If *yes*, the main change you can expect is an increase in awareness among individual participants. Is this the change you want to make with this project?

❑ Yes ❑ Partly ❑ No

Individual Change Focus Projects: TRAINING	
Characteristics:	• Series of events often intended for specific audiences • Identified audience likely defined geographically (such as a neighbourhood, town, or city), organizationally (such as employees, volunteers, and board members of public institutions, businesses, and non-profit organizations), or sectorally (such as the health or education sectors)
Examples:	Workshops, conferences, study groups, training, coaching or mentoring sessions
Considerations:	• Typical group size ranges from 10 to 30. • Potential to extend participant learning beyond awareness • Participants are easier to follow up with after the events because they have usually registered. • Often complemented by activities aimed at improving policies, programs, and services

Does your project fit in this category?

❑ Yes ❑ Partly ❑ No

If *yes*, the main changes you can expect are an increase in knowledge and skills and changes in attitudes and behaviours. Are these the kinds of changes you want to make with this project?

❑ Yes ❑ Partly ❑ No

Systemic Change Focus Projects: MOBILIZING PUBLIC ACTION	
Characteristics:	Broad-based public actions to support diversity positions on issues
Examples:	Letter writing or petition campaigns, protest marches and hunger strikes, building alliances and coalitions
Considerations:	• Success hinges largely on careful messaging and wide public participation. • Often aimed at persuading key decision-makers to adopt a diversity position

Does your project fit in this category?

❑ Yes ❑ Partly ❑ No

If *yes*, the main changes you can expect are a stronger public voice in support of a diversity position, or heightened influence on decision-makers. Are these the kinds of changes you want to make with this project?

❑ Yes ❑ Partly ❑ No

Systemic Change Focus Projects: PROMOTING POLICY & PROGRAM ALTERNATIVES	
Characteristics:	Research and lobbying geared to improving policies, programs, and services within non-profit organizations, businesses, public institutions, and all levels of government
Examples:	Reviews of organizational policies and procedures, policy studies, charter challenges of current legislation, lobby efforts aimed at launching public inquiries
Considerations:	• Often requires the involvement of key decision-makers • May be initiated internally or externally • Often complemented by activities aimed at changing individual behaviours

Does your project fit in this category?

❑ Yes ❑ Partly ❑ No

If *yes*, the main changes you can expect are stronger organizational commitment to diversity; changes in policy, legislation, regulations, procedures; increased resources allocated to diversity initiatives; or new programs and services. Are these the kinds of changes you want to make with this project?

❑ Yes ❑ Partly ❑ No

Step 3: Refining Your Project Idea

Now that you have a clearer idea of the changes possible given the types of activities your project will conduct, use the questions in the Tool 2 worksheet on the next page to help you refine your project idea.

Be sure that there is a direct and logical relationship between your activities and the changes you seek. For example:

> If your group is planning a multicultural festival or public awareness campaign, it may be unreasonable to expect increased skills among your audience — there might be a mismatch between what you are doing and the change you seek. It would be more reasonable to expect increased participant awareness of the issue raised in the event.
>
> That said, if your efforts to organize the festival were to include training with volunteers, partners, and employees, so that they in turn act as resources to the participants, then your group may be able to claim increased knowledge and skills among the participants.

When you are done, check your answers to ensure that:

- They are consistent with your organization's stated vision and mission.
- Your group has agreed on the type of change you wish to create within your project.

In addition to using this tool for a specific project, you may wish to review your organization's overall program, using the questions below:

- How many types of diversity education activities is your organization carrying out at the moment?
- Does this make sense in view of your resources, and organizational strengths and context?
- How well do these activities complement and build on each other?

REFINED PROJECT IDEA

1. What changes do we want to see?

2. What part of this change can my group affect?

3. What activities will we conduct to bring about this change?

4. How will our proposed activities bring about the changes we seek?

5. Who needs to be involved? How should they be involved?

6. What time, skills, and funding are needed for the project to be successful?

Tool 3: Drafting an Outcome Measurement Framework

Purpose

To help your group put together an Outcome Measurement framework for your project, showing the logical connection between what you are doing and the results you are expecting.

Description

This tool begins with a brief overview of the logic and the components of an Outcome Measurement framework. Then it provides examples of fairly typical diversity education activities with their outcome statements, as well as examples of typical project inputs.

When To Use

- At the beginning of any new project
- When you are developing:
  - a proposal
  - an internal system to manage your project
  - a shared understanding of what your project aims to do and change

How To Use

In Step 1, review the language and concepts of Outcome Measurement.

In Step 2, look at the examples of activities, outputs, and short-term outcomes, and check those that are most relevant to your project.

In Step 3, check the intermediate and long-term outcomes that relate most closely to the activities, outputs, and short-term outcomes that you checked in Step 2.

In Step 4, write your own activities, outputs, and outcome statements for your project idea, using the statements you've selected in Steps 2 and 3 of this tool to spark your ideas. Ensure that your statements present the logic of your project. An Outcome Measurement framework template is included.

In Step 5, for each planned activity in your framework, ask your group to identify the inputs required, using the checklist provided. Use this information to develop a project budget.

BEGIN TOOL 3 HERE

Step 1: Reviewing the Basics

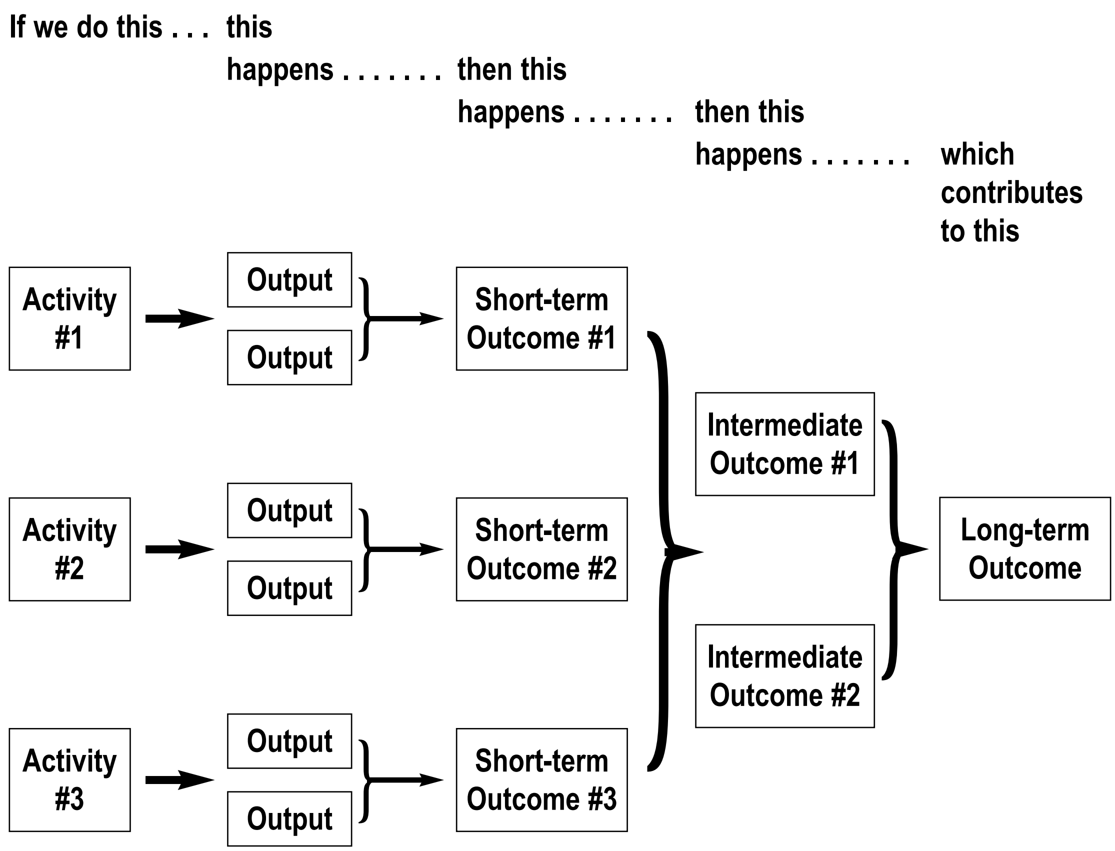
An Outcome Measurement framework (also known as a logic model) has the following components:

- **activities** — what you will do
- **outputs** — the volume of work you produce
- **short-term, intermediate, and long-term outcomes** — your anticipated results

The outputs, and short-term, intermediate, and long-term outcomes are sometimes referred to as the results chain.

These components can be mapped out as a chain of events, as shown on the next page.

RESULTS CHAIN



The chart on the next page defines these components, and describes:

- who is affected
- when the components are observable
- how much control the project can exercise over each level of outcome

OUTCOME MEASUREMENT AT A GLANCE			
Definitions	**Who is affected**	**When observable**	**Degree of control**
Inputs are the human and physical resources that make the project possible: the people, equipment, supplies and other ingredients.			
Activities are 5 - 8 short paragraphs that describe activity sets of what the project is doing.	They are written from the vantage point of those managing or doing the work (e.g., managers, staff facilitators, volunteers).		
Outputs are a description of the volume of work completed in each activity set. Outputs are most often *quantitative* - that is, things you can count.	They refer to the product of your activities, people or things (e.g., number of participants, number of brochures).	As you complete the activity	Substantial control
Short-term Outcomes are the first changes, one for each activity set. Short-term outcomes are *qualitative* descriptions of changes in awareness, knowledge, skills, attitudes, or behaviour.	They refer to changes among those people directly participating in an activity (e.g., trainees).	Within the timeframe of the project	Less control than over outputs, although still significant
Intermediate Outcomes are 2 - 4 statements, usually *qualitative* descriptions, of later results — the key changes you want to make in the project. Intermediate outcomes are fewer in number, and each flows naturally from several of the short-term outcomes.	They expand into wider settings, going beyond those direct participants to include the families, organizations, or neighborhoods surrounding them. They may also include people or workplaces that use, or are influenced by, products created in the project.	At or shortly after the completion of the project	Increasingly less control, since these outcomes are more than one step removed from your activities — but you still have some influence
Long-term Outcome is a much later result, and is usually one statement. This is a statement of the preferred future — say two to four times farther into the future than the duration of the project. This is a result to which your project can only contribute.	It may expand into yet wider settings to include changes in societies, districts, communities, professions, or whole organizations.	Well after the project has been completed	Indirect influence only — the project will not achieve this outcome, but will contribute toward it.

Step 2: Identifying Activities, Outputs, and Short-term Outcome Statements

The chart on pages 35 - 38 provides a generic list of 14 types of activities commonly carried out in diversity education projects. Each of these has a set of possible outputs and short-term outcomes, which you can adapt or refine for your project.

Review this chart. Check the boxes of the activities, associated outputs, and short-term outcome statements that are relevant to your project. Some of the activities listed below might be components of a larger project, while some might represent an entire project. No matter the size and scope of your project, you should be able to capture it in five to eight activities, with corresponding outputs and outcomes.

ACTIVITIES	OUTPUTS	SHORT-TERM OUTCOMES
❑ 1. Promote the project, organization, or event to key audiences.	• Number of posters • Number of brochures • Number of public service announcements • Number of organizations notified	The people you want to attract know what they need to know in order to: • participate • contact your organization • attend the event
❑ 2. Organize and coordinate event logistics.	• Number and type of events	The time, place, and resources you use are well suited to the audience you want to attract.
❑ 3. Design and deliver the workshop or presentation.	• Number of handouts • Number of participants • Number of workshops	• The audience's expectations of content and format are met. • The message is consistent with the intent of your project and the audience's position on the Change Continuum (see page 11).

ACTIVITIES	OUTPUTS	SHORT-TERM OUTCOMES
❑ 4. Broaden and deepen networking relationships.	• Number and range of organizations within network	• Relevant information flows to your group from wider sources. • The network's function is improved by your group's contribution. • There is broader knowledge of, and support for, your project.
❑ 5. Identify and form partnerships with other relevant organizations.	• Number and type of partnership relationships • List of partnering organizations	• Partnered organizations share the same vision. • Partnered organizations work well together, each contributing its greatest strengths.
❑ 6. Create and maintain an information resource centre.	• Types of information available at the centre • Hours per week available for user access • Size of collection • Availability of a means to store and retrieve information	Intended users have access to relevant information.
❑ 7. Identify, design, and develop print, audio, and video resources on identified topics.	• Number and type of resources produced, by topic	• The design of the information — both its content and the way it is presented — is well suited to the needs of the intended audience. • Users are satisfied with the product.

ACTIVITIES	OUTPUTS	SHORT-TERM OUTCOMES
❑ 8. Identify research topics; gather and document information; and disseminate to your intended audience.	• Number of documents researched • Number of hours spent researching • Number of topics researched • Number of sources	• The research plan or question addresses project outcomes. • Information gathering is done with generally accepted research rigour. • Documentation is clear and detailed enough to be useful. • Intended users receive information in a timely manner.
❑ 9. Recruit, orient, coordinate, and recognize volunteers.	• Number of volunteers recruited • Number of training sessions • Number of volunteer hours • Number of volunteers managed • Number of recognition events	• Suitable volunteers are found for non-paid tasks. • Individual volunteers are well matched to their roles. • Volunteer experience is good for both the volunteers and the organization.
❑ 10. Recruit, orient, and facilitate formation of the planning or working group.	• Number of persons routinely attending planning or working group • Composition of group	Group members: • are appropriately representative of project stakeholders • agree on roles and responsibilities • have a plan • are progressing according to plan

ACTIVITIES	OUTPUTS	SHORT-TERM OUTCOMES
❑ 11. Identify knowledge and skill requirements; and train and coach individuals on identified topics.	Items identified in needs assessment	• Skill building content and methods are well suited to the learning needs of participants. • Participants: - claim new knowledge, skills, strategies, contacts - demonstrate intent to use learning in their own workplace or community
❑ 12. Provide consulting or advisory support on identified topics.	• Number and type of services provided, by topic area • Number of hours spent per assignment	Information and advice are relevant and timely.
❑ 13. Facilitate sessions to identify, address, and resolve diversity-related conflicts among groups.	• Number of conflict resolution processes • Number of hours required per process	• Conflicting parties understand and agree to the resolution process. • Opposing positions are known to all parties. • Parties proceed to a higher level of mutual understanding.
❑ 14. Evaluate project, and identify possible follow-up activities.	• Evaluation reports • Number of follow-up activities identified	• Project team and key stakeholders have: - better understanding of the outcomes achieved - ideas to improve the project

Step 3: Identifying Intermediate and Long-term Outcomes

On the next two pages there are six kinds of intermediate outcome statements, and three kinds of long-term outcome statements that are relevant to diversity education.

Review these outcome statements, and check the boxes of the statements that are relevant to your project. Remember, intermediate and long-term outcomes flow from several activities and their short-term outcomes.
See the diagram in Step 1 on page 33.

INTERMEDIATE OUTCOME STATEMENTS

Public Engagement

- ❑ The issue gains prominence among intended segments of the population; there is an increase in debate and public exchange.
- ❑ The issue is formally acknowledged and addressed by a public body.
- ❑ Participants use something they learned in an educational session.
- ❑ The media presents a more constructive perspective on the topic than previously.

Diversity Activism

- ❑ Participants think and behave differently; they apply the concepts, tools, and knowledge gained at home, among friends, and in their workplaces.

Community Resourcing

- ❑ The organization gains prominence within a specific institution or community as a primary source of information and support for diversity.

Support for Diversity in Organizations

- ❑ Management and staff understand more fully the relevance of diversity to their organization.
- ❑ The organization commits resources to a further exploration of the barriers.
- ❑ The organization develops strategies to enhance adoption of practices and procedures that encourage increasing diversity.

Community Collaboration

- ❑ Organizations with similar interests in the subject matter work together in new ways.
- ❑ Collaborating organizations achieve more, and reach farther, than they could working alone.

Policy Influence

Decision-makers:

- ❑ acknowledge the policy stance fostered by the organization or project
- ❑ alter their timetable or agenda to address the issue
- ❑ engage in dialogue with those promoting the policy idea to combat racism or promote diversity
- ❑ incorporate the policy idea into the wording and intent of new or revised policy
- ❑ establish new or amended policy that satisfactorily addresses the inequity or racism witnessed and experienced

Of the long-term outcome statements:

- The first is geared to a project aimed at a broad public audience.
- The second is geared to a project aimed at a defined group, such as board, staff, and volunteers in an organization.
- The third is geared to a project aimed at changing laws, policies, and regulations.

LONG-TERM OUTCOME STATEMENTS
❑ Our communities value the multiculturalism in our society, and respect the experience and contributions each of us brings.
❑ Organizations remove workplace and service barriers to ethnic, religious, and cultural diversity, and welcome the opportunity to employ and serve diverse people.
❑ Canadians are treated equitably, and gain access to social, political, economic, and cultural opportunities.

Step 4: Assembling a Project Framework

Refer to the Results Chain diagram on page 33. Using flipcharts, develop your own activities, outputs, and outcome statements for your project. This may involve several drafts to ensure agreement among all your team members that you have accurately and realistically presented what you are planning to do and trying to change.

Next, check the logic of the framework by asking your group, "If we do this activity, do the related outputs and outcomes result?" Once all your statements meet this test, then go through your activities. For each activity, ask the group, "Why is this important?" The answer should be shown in the corresponding short-term outcome statement. Read the statement out, and if the group is comfortable that this is the best answer, then the logic is strong. If not, then you may have to rework either the activity or the short-term outcome statement. Repeat this process to check the flow between the short-term outcome statements and the intermediate outcome statements.

When your group is satisfied with the draft framework, use the Tool 3 worksheet template on page 43 to present the information.

Step 5: Identifying Project Inputs

Now that you have drafted your project framework, you need to think about the human and physical resources you will need — these are called inputs. Review the list of possible project inputs below, and check the boxes of those that you need to carry out your activities.

On a separate sheet of paper, expand on the exact inputs you will require, and how much each will cost — in other words, build a preliminary budget for your project. Ask yourself, "Is this budget feasible?" If not, which inputs — and activities, with their corresponding outputs and short-term outcomes — can be cut? What influence will that have on your intermediate and long-term outcomes?

When you are confident that you have identified the appropriate inputs for your project, insert them in the first column of your draft framework. Your Outcome Measurement framework is now complete!

PROJECT INPUTS	
❑ **Staff Time**	Name the staff position, and approximate the amount of time required. This can be expressed as the total number of hours, days, or months per position.
❑ **Volunteer Time**	This can be expressed as the total number of hours, days, or months. Some funders like to see this information, since it provides a measure of the group's contribution to the project.
❑ **Equipment**	*For example:* computer, display boards, sound system
❑ **Supplies**	*For example:* stationery, film, refreshments
❑ **Fixed Cost Contributions**	*For example:* share lease or rent of office space, telephone, photocopier, internet service, insurance, accounting services
❑ **Communications Services**	*For example:* long distance telephone and fax charges, courier, postage
❑ **Production Services**	*For example:* design and layout, printing, photocopying
❑ **Information Services**	*For example:* subscription or data access fees
❑ **Other Expenses**	Think beyond the ordinary. Are there other inputs you will need? *For example:* honoraria for specialists

OUTCOME MEASUREMENT FRAMEWORK

INPUTS	ACTIVITIES	OUTPUTS	SHORT-TERM OUTCOMES	INTERMEDIATE OUTCOMES	LONG-TERM OUTCOME

Notes

Tool 4: Identifying Outcome Indicators

Purpose

To help your group generate indicators that identify what you will monitor during the project, and what you will evaluate at the end of the project to demonstrate your results.

Description

This tool offers possible indicators that could provide evidence of achieving the outcomes set out in Tool 3. These ideas can help you generate your own list of indicators for your own outcome statements.

When To Use

- At the beginning of any new project
- After your group has developed an Outcome Measurement framework, and is preparing to measure the achievements of the project

How to Use

In Step 1, review the introductory information about indicators.

In Step 2, review the possible indicators for the sample activities and short-term outcomes. Check those indicators that are most relevant to your project idea. Adapt these to fit your project, creating a list of possible indicators.

In Step 3, review the possible indicators under the six intermediate outcome headings. Again, check those indicators that are most relevant to your project idea, and build a list of your own possible indicators for your project's outcomes. Repeat this step for the long-term outcome indicators.

In Step 4, use the indicator checklist to help your group select the strongest indicators. Assemble your final list of indicators, using the Tool 4 worksheet provided.

BEGIN TOOL 4 HERE

Step 1: Reviewing Outcome Indicators

Indicators indicate! They can be *qualitative*, showing some kind of before-and-after change in a condition or quality that clearly indicates progress (or lack of progress), or *quantitative*, representing a count of something.

You need just enough indicators to capture key details of your project's performance, but not so many that you are overwhelmed with information. Is there a magic number? Not really, but you need at least one indicator for each short-term, intermediate, and long-term outcome.

How do you know when you have a good indicator? The indicator checklist in Step 4 will help you determine how good an indicator is for providing evidence of change.

Indicators may look a little different as you move from short-term to intermediate to long-term outcomes. These differences are set out in the boxes below and on the next page.

SHORT-TERM OUTCOME INDICATORS

- Give an idea of the quality of change that has been created by the activity.
- Predict the likelihood of achieving your intermediate outcomes.
- Should be tracked regularly. This is often called *monitoring*. The information should be gathered as the activities are unfolding.
- Indicators at this level are the immediate changes experienced by participants in your activities, and are often changes in information and awareness.
- You should have your short-term outcome statements and their indicators in mind as you carry out your activities. It is good to know this information as soon as possible, because it may cause you to do something different while your project is still underway.

INTERMEDIATE OUTCOME INDICATORS

- These indicators should point to the kinds of changes you can expect at the end of the project, or shortly thereafter.
- Sometimes you have to find people after the activities have ended to find out what difference the project has made to them. This can be tricky, especially for projects with a large public audience.
- You should have your intermediate outcome statements and their indicators in mind as you carry out your activities.
- The good news is that you don't have to gather this information as frequently.

LONG-TERM OUTCOME INDICATORS

- These indicators point to the changes you can expect after the project is complete.
- Your project will have contributed to these changes, but others will also have contributed. Usually your organization, alone, is not responsible for collecting long-term change information.
- From time to time, impact evaluations or sectoral studies are carried out by funding agencies, policy research bodies, or coalitions.

Step 2: Identifying Short-term Outcome Indicators

On pages 48 - 51 is a chart of sample indicators for short-term outcome statements that might be relevant to your diversity education project. Check the boxes that are relevant for your project activities and short-term outcomes. Consider the list of sample indicators, and select those that best fit your project.

You may want to use a flipchart to write down the indicators you have selected. Refine and adapt them to fit your project. These will be used in Step 4.

ACTIVITIES & SHORT-TERM OUTCOMES	SHORT-TERM OUTCOME INDICATORS
❑ **1. Promote the project, organization, or event to key audiences.** The people you want to attract know what they need to know in order to: • participate • contact your organization • attend the event	❑ Number and type of media used ❑ Number and type of audiences identified ❑ Number of individuals contacting the organization for more information ❑ Number of people in attendance, by audience type ❑ Comparison between audience profile and intended audience
❑ **2. Organize and coordinate event logistics.** The time, place, and resources you use are well suited to the audience you want to attract.	❑ Comparison between the venue, the timing, and the resource people on one hand, and the needs and preferences of the intended audience on the other (e.g., content that will interest the audience, learning styles that will engage the majority of participants)
❑ **3. Design and deliver the workshop or presentation.** • The audience's expectations of content and format are met. • The message is consistent with the intent of your project and the audience's position on the Change Continuum (see page 11).	❑ Level of audience satisfaction with content, resource persons or materials, style of delivery, facilities ❑ Comparison between: • the key message • the mandate of your project or organization • the audience's position on the Change Continuum (see page 11)

<table>
<tr><th>ACTIVITIES &
SHORT-TERM OUTCOMES</th><th>SHORT-TERM OUTCOME INDICATORS</th></tr>
<tr><td>❑ 4. Broaden and deepen networking relationships.

• Relevant information flows to your group from wider sources.
• The network’s function is improved by your group’s contribution.
• There is broader knowledge of, and support for, your project.</td><td>❑ Frequency of contact with network members
❑ Staff time spent networking versus practical organizational benefits
❑ Comparison of actual versus potential contribution by your group network, as perceived by members
❑ Number of contacts and referrals generated by network members</td></tr>
<tr><td>❑ 5. Identify and form partnerships with other relevant organizations.

• Partnered organizations share the same vision.
• Partnered organizations work well together, each contributing its greatest strengths.</td><td>❑ Consistency among partners on:
• their vision and values
• their view of what can be achieved through partnership
❑ Extent to which each partner is contributing core competencies and influence to the partnership</td></tr>
<tr><td>❑ 6. Create and maintain an information resource centre.

Intended users have access to relevant information.</td><td>❑ Number and range of people and groups accessing the resource centre
❑ Level of satisfaction by users with:
• hours of operation
• range of topics
• quality of information
• access to information
❑ Number and type of resources accessed</td></tr>
<tr><td>❑ 7. Identify, design, and develop print, audio, and video resources on identified topics.

• The design of the information — both its content and the way it is presented — is well suited to the needs of the intended audience.
• Users are satisfied with the product.</td><td>❑ Level of satisfaction with the resource:
• the message
• the form of presentation
• availability to the user</td></tr>
</table>

ACTIVITIES & SHORT-TERM OUTCOMES	SHORT-TERM OUTCOME INDICATORS
❑ **8. Identify research topics; gather and document information; and disseminate to your intended audience.** • The research plan or question addresses project outcomes. • Information gathering is done with generally accepted research rigour. • Documentation is clear and detailed enough to be useful. • Intended users receive information in a timely manner.	❑ Relevance of the research to the planned outcomes of the project ❑ User satisfaction with: • reliability of findings • clarity and relevance of presentation • timeliness of information
❑ **9. Recruit, orient, coordinate, and recognize volunteers.** • Suitable volunteers are found for non-paid tasks. • Individual volunteers are well matched to their roles. • Volunteer experience is good for both the volunteers and the organization.	❑ Volunteer satisfaction with their role in the organization and project ❑ Extent to which individual volunteers complete tasks according to expectations and deadlines
❑ **10. Recruit, orient, and facilitate formation of the planning or working group.** Group members: • are appropriately representative of project stakeholders • agree on roles and responsibilities • have a plan • are progressing according to plan	❑ Comparison between representation in the group and range of people with a stake in the project's success ❑ Group agreement on: • roles and responsibilities • plan of action • progress in relation to the plan of action ❑ Level of initiative of the facilitator versus that of the group itself

ACTIVITIES & SHORT-TERM OUTCOMES	SHORT-TERM OUTCOME INDICATORS
❑ **11. Identify knowledge and skill requirements; and train and coach individuals on identified topics.** • Skill building content and methods are well suited to the learning needs of participants. • Participants: - claim new knowledge, skills, strategies, contacts - demonstrate intent to use learning in their own workplace or community	❑ Comparison between the needs and opportunities identified and capacity building projects implemented ❑ Comparison of teaching method and content with the learning needs of participants ❑ Participant satisfaction with knowledge, skills, strategies, contacts gained, and design of capacity building project ❑ Proportion of participants who state or demonstrate their intent to use the learning in their workplace or community
❑ **12. Provide consulting or advisory support on identified topics.** Information and advice are relevant and timely.	❑ User satisfaction with relevance and timeliness of support received
❑ **13. Facilitate sessions to identify, address, and resolve diversity-related conflicts among groups.** • Conflicting parties understand and agree to the resolution process. • Opposing positions are known to all parties. • Parties proceed to a higher level of mutual understanding.	❑ Level of agreement between parties on what the conflict resolution process could achieve ❑ Comparison of the level of commitment to proceed ❑ Change in the balance between points of disagreement and agreement
❑ **14. Evaluate project, and identify possible follow-up activities.** • Project team and key stakeholders have: - better understanding of the outcomes achieved - ideas to improve the project	❑ Changes in project activities as a result of evaluation findings ❑ Number of project ideas generated

Step 3: Identifying Intermediate and Long-term Outcome Indicators

On pages 52 - 54 are charts of sample indicators for intermediate and long-term outcome statements.

Check the boxes that are relevant for your project outcomes. Consider the list of sample indicators, and select those that fit your project.

On a flipchart, write down the indicators you have selected. Refine and adapt them to fit your project. These will be used in Step 4.

INTERMEDIATE OUTCOMES	INTERMEDIATE OUTCOME INDICATORS
❑ **Public Engagement**	❑ Change in pattern of information exchange or debate between groups: • intensity • range of discussion ❑ Amount and type of media coverage stimulated by the project in the community ❑ Type of public statements issued by organizations, institutions, and businesses involved in the project: • level of acknowledgement of the issue at hand • commitments related to promoting diversity and combating racism ❑ Proportion of participants who note that they: • see things differently • do things differently following the project ❑ Change in the pattern of media interest or the coverage of news items related to diversity and combating racism
❑ **Diversity Activism**	❑ Proportion of participants who describe or demonstrate: • heightened sensitivity toward discriminatory behaviours by people or institutions • increased interest in getting information on how to actively promote diversity and combat racism • an act of diversity leadership at home, work, or in their community that they would not have felt comfortable carrying out prior to the project

INTERMEDIATE OUTCOMES	INTERMEDIATE OUTCOME INDICATORS
❑ **Community Resourcing**	❑ Change in the pattern of use of resource centre and website by the community: • volume of inquiries • profile of users - demographic make-up - interest areas - first time versus multiple users • types of inquiries ❑ Level of recognition of resource centre and website among staff and volunteers in relevant organizations (e.g., local schools)
❑ **Diversity in Organizations**	❑ Change in the way managers and staff describe: • diversity in relation to their own organization • the value of an organization wide initiative to improve diversity practices ❑ Changes in allocation of time and funds to explore barriers and to identify strategies to build diversity practices ❑ Progress in relation to the organization's diversity change plan
❑ **Community Collaboration**	❑ Changes in: • patterns of working together - new configurations of organizations - new forms of interaction • kinds of issues addressed in the community ❑ Extent to which partnerships provide advantages over any single organization working alone
❑ **Policy Influence**	❑ Evidence that key decision-makers: • acknowledge policy position put forward by the group or project • alter their timetable or agenda to address the issue • engage in dialogue with those promoting the policy idea • incorporate the policy idea into the wording and intent of new or revised policy • establish new or amended policy that satisfactorily addresses the inequity or racism witnessed and experienced

<table>
<tr><th>LONG-TERM OUTCOMES</th><th>LONG-TERM OUTCOME INDICATORS</th></tr>
<tr><td>❑ Canadians value the multiculturalism in our society, and respect the experience and contributions each of us brings.</td><td>❑ Within each participating community, a before-and-after comparison of:
• level of effort
• number of community members actively involved in diversity initiatives
• number of contacts and alliances made with minority communities and mainstream organizations in efforts to promote diversity and combat racism</td></tr>
<tr><td>❑ Organizations remove workplace and service barriers to ethnic, religious, and cultural diversity, and welcome the opportunity to employ and serve diverse people.</td><td>❑ Before-and-after change in the organization’s level of cultural competency in:
• organizational culture
• governance
• administration
• personnel practices
• communication
• community relations
• service delivery
• policy and decision making</td></tr>
<tr><td>❑ Canadians are treated equitably, and gain access to social, political, economic, and cultural opportunities.</td><td>❑ Before-and-after change in selected social policy and programming</td></tr>
</table>

Step 4: Choosing the Best Indicators

On the next page is a checklist to help you select the best indicators from the ones you have developed.

Number each of your possible outcome indicator statements. Then, for each question in the checklist, mark the number of the indicator at the appropriate place on the line.

Select those indicators that are the most accurate, most cost-effective, and most useful as a management tool.

INDICATOR CHECKLIST

For each outcome indicator statement, ask yourself:

1. **Accuracy:** Is it accurate? Is it always going to measure what you need to know, or could it be telling you something else?

   YES ←——————————————→ NO

2. **Cost-effectiveness:** Is it cost-effective to collect the information?

   YES ←——————————————→ NO

3. **Privacy:** Can information be gathered without invading privacy and breaching confidentiality?

   YES ←——————————————→ NO

4. **Representativeness**: Does the information help your group understand how the project is affecting men and women, and specific groups of people differently?

   YES ←——————————————→ NO

5. **Usefulness:** Does it give useful information with which to make management decisions?

   YES ←——————————————→ NO

6. **Meaningfulness:** Will the information communicate well to stakeholders, including funders?

   YES ←——————————————→ NO

As you test your proposed indicators, you may realize that you want to:

- improve your indicator by making it clearer to understand, or more specific to the outcome you want to measure
- improve your outcome statement

Feel free to do either. Even then, you may not have the best possible indicator. Look for improvements over time as you put them into practice.

Assemble your final list of indicators, using the Tool 4 worksheet provided on the next page.

OUTCOME INDICATORS		
SHORT-TERM OUTCOME INDICATORS	INTERMEDIATE OUTCOME INDICATORS	LONG-TERM OUTCOME INDICATORS

Tool 5: Assembling a Data Collection Plan

Purpose

To help your group identify the best ways to collect the information needed to measure your project outcomes.

Description

This tool provides an overview of the elements of a data collection plan, and then presents a series of suggestions or questions to consider for each of these elements. It will help you decide on data sources and appropriate data collection methods for your project. It also discusses the research issues you will need to consider.

When To Use

- At the beginning of any new project, once you have developed your Outcome Measurement framework and indicators (Tools 3 and 4)
- As a review when you are ready to begin collecting data
- After your group has gone through one round of data gathering and analysis, and you want to improve on your data collection process

How to Use

In Step 1, review the table of data collection plan elements.

In Step 2, for each set of indicators (corresponding to an outcome statement), think about where, or from whom, you will be able to get the information your group will need. Think through the questions about logistics and sampling before you make any final decisions about appropriate sources.

Be sure to investigate and conform to the requirements of the **Personal Information Protection and Electronic Documents Act**, which governs the management of personal information for organizations and businesses in Canada. In Alberta, your group will also need to comply with the provisions of the **Personal Information Protection Act**. Websites for both of these are provided in *Useful Resources* on page 95.

In Step 3, review the list of group characteristics and possible constraints you may face when collecting data from people. Check those that may apply, and use them to stimulate your thinking about any other constraints that may exist. Have these in mind when you review the list of possible data collection methods, and their advantages and disadvantages. Check those that you could use or adapt for your project.

In Step 4, you may want to use the Tool 5 worksheet template provided, or start a chart on flipchart paper. Work through all the columns in the data collection plan with your group.

See pages 95 and 98 of *Useful Resources* for on-line information about ethical research considerations, sampling, and questionnaire design.

BEGIN TOOL 5 HERE

Step 1: Reviewing the Elements of a Data Collection Plan

You have already developed your indicators, so you are now ready to develop a plan for data collection.

Review the chart on page 60, which sets out the following elements of a data collection plan:

- Outcome statements
- Indicators
- Data sources
- Collection methods and frequency of collection
- Who collects, sorts, and compiles
- Who analyzes
- When analyzed

Usually, your data collection is linked to three stages:

- **Baseline**
  Ideally, you should have an idea of conditions at the start of your project — a *baseline* to which you can compare the changes that have occurred since then. It is easier to establish a baseline if you gather information at the very beginning of your project. However, if there is no documented information from before the project began, you can ask before-and-after questions to gather people's opinions on the changes the project has made.

- **Monitoring**

  You will be collecting data regularly during the course of your project. This data will help you to understand what is happening in your project, so that you can make any necessary adjustments to achieve your outcomes. Regular monitoring will provide essential information to include in your reports to funders and other stakeholders.

- **Evaluation**

  In more complex and long projects, you might gather information in the middle of the project for a mid-term evaluation. Then, as the project winds up, you might conduct a final evaluation. Evaluations can be done internally, although they are also carried out jointly, or completely with outside evaluators.

ELEMENTS OF A DATA COLLECTION PLAN	
Outcome Statements	What are your outcome statements? (See Tool 3)
Indicators	What are the indicators that demonstrate whether or not you are making progress toward your outcomes? (See Tool 4)
Data Sources	• Who can tell you what you need to know? • Where can you find the data you need? There are three broad sources of data: - project documents - people involved in project activities - people affected by the project
Collection Methods and Frequency of Collection	• What are the best ways to collect the data? *Examples:* questionnaires, interviews, focus groups. You may already be collecting some of the data you need. • When, or how often, will the data be collected? *Examples:* after every other workshop, quarterly, yearly
Who Collects, Sorts, and Compiles	Who is responsible for collecting, sorting, and compiling the data for each indicator?
Who Analyzes	Who is responsible for: • reviewing the compiled data • deciding what it means • identifying what decisions and actions should be taken This is usually most effective when it is done in a group — either among the project team (particularly for short-term outcomes), or with the project team and stakeholders at major milestones to look at progress toward intermediate and long-term outcomes.
When Analyzed	How often will the data be analyzed? Analysis should take place regularly during the project period, to ensure that your activities are yielding the expected outcomes.

Step 2: Thinking Through Data Sources

Start with the question of where you are going to get the data, then consider the most appropriate methods. On pages 62 - 64 are some common data sources, with notes about how to gather information from them.

The charts on pages 63 and 64 describe data collection from people involved in, or affected by, the project at different outcome levels.

Review the charts, and think through the sources from which you will be able to get the data you need. Make notes on a flipchart.

<table>
<tr><th colspan="2">DATA SOURCE: Project Documents</th></tr>
<tr><td>Examples</td><td>Project documents might include records such as:
minutes of meetings
attendance sheets
telephone call logs
volunteer files
client records
distribution lists
newsletters
other records</td></tr>
<tr><td>Logistics</td><td>How do you design records to ensure they capture the data you need?
For example:
If you want to know how many people are making progress on their portions of the project plan, an update from each member of the team should be part of the team meeting (perhaps as an agenda item), so that records are consistent.
To track how many people attend your event, you need to design an attendance sheet, and way for people to sign up.</td></tr>
<tr><td>Data Sampling</td><td>How will you ensure that your project team and volunteers don’t get measurement fatigue? Sampling is one of the ways to deal with this; it is not necessary to examine every record, or to talk to every person involved in the project.

How will you select just enough records so that they are representative of all the available records, and will give you a reliable and accurate picture?
For example:
A review of one set of weekly meeting minutes from the last year will give you a less accurate idea of what progress was made over the year than a review of half or one-quarter of the meeting minutes.
Three people’s responses may give you a skewed impression of how 100 people feel, whereas responses from 25 of those people will yield a more accurate picture.
There are many different kinds of sampling techniques. It is important to find the most appropriate method for your organization.</td></tr>
<tr><td>Establishing a Baseline</td><td>How will you know what the situation was before your project started, in order to show changes as a result of your activities?

A baseline uses the same sampling process used in data collection throughout the project. Then, a comparison of similar data is possible.

Document review, particularly of records like meeting minutes, may not be available as a baseline. However, if you want to create changes in media coverage on diversity issues, it might be possible to sample a number of articles pre-project, and compare that to a sample of articles during and post-project, in order to see how these have changed.</td></tr>
</table>

DATA SOURCE: People involved in the project at the short-term outcome level	
Examples	Short-term outcome data is often obtained from people who: • attended one of your activities or events • are part of your project team, committee, or advisory group • collaborated on research or events
Logistics	How will you ensure that your collection method matches your audience, venue, time allotted, and budget?
Data Sampling	Again, sampling is key. How will you select just enough people to have a fair representation of the total population? *For example:* If a conference has 250 attendees, instead of asking every participant, "What was the most important thing you learned during the conference?", organizers can ask every 10th person the same question on their way out the door.

DATA SOURCE: People affected by the project at the intermediate outcome level	
Examples	You are now looking for changes that ripple out beyond project participants. Data sources now include people who have not been directly involved in the project, such as: • friends • family • neighbours • co-workers • teachers or: • partner organizations • policy-makers • media organizations
Logistics	How will you reach people to measure change in both participants and people who may have had no direct interaction with the project?
Data Sampling	Again, sampling is key. How will you select just enough people to have a fair representation of the total population? *For example:* Instead of asking every resident to comment on the changes your project has made in the community, project team members each randomly select 50 people to interview — shopkeepers, people walking on the street, people in the park, men and women of all age groups and across backgrounds and ethno-racial groups.

DATA SOURCE: People affected by the project at the long-term outcome level	
Examples	Here the focus of change expands into wider settings: • a neighbourhood • an organization • a community • a sector
Logistics	The data to show change at the long-term level is often beyond the scope of an individual project to collect. This is most often done through an external evaluation (hired by the funding agency), or through a larger sectoral review.
Data Sampling	Sampling is essential at this level, since you are dealing with larger numbers of people. See page 95 in *Useful Resources* for a list of resources related to sampling.

Step 3: Choosing the Best Methods for the Job

The table on the next page describes some possible characteristics of your information source group, and constraints that may exist.

Check the characteristics of your group, and consider whether or not the constraints described are applicable in your situation. Jot down your own notes on constraints that exist within your project situation.

CHARACTERISTICS **of your source group**	**CONSTRAINTS** **you might face in data collection**
More than one of these characteristics may apply to the individuals in your group.	These constraints may exist within a given group. Knowing your audience will help you decide on the best way to collect data.
Age Group ❑ 6-12 years ❑ 13-17 years ❑ 18-25 years ❑ 26-65 years ❑ 66+ years	• Limited writing skills and short attention spans • Desire to conform or impress peers • Overly critical • Limited time • Difficulty hearing; less mobile
Familiarity with English ❑ Fluent ❑ Functional ❑ Basic	• Very comfortable speaking in front of a large group; may monopolize conversation • Limited comfort with writing; less comfortable speaking in front of a large group • Limited comfort with writing and speaking
Ethno-cultural Background It is impossible to list all the variations in this category. Examples include: ❑ Respect for authority ❑ Respect for others	• Uncomfortable being critical • Uncomfortable with open discussion due to interruptions
Gender ❑ Mixed group	• Discomfort in speaking publicly
Output Level Those people directly involved in your activities ❑ People attending a public event ❑ Participants in sessions where the time runs out	• Participants coming and going throughout the activity • Activities take longer than planned, and there is no time left to evaluate the session
Outcome Level Those influenced by the project, but not directly involved ❑ Those not participating in activities, but influenced by the project	• Limited interest in helping you understand your project's outcomes

Data Collection Methods

The methods you use need to match the type of data you need. Remember that examining outcomes is less about finding out whether people are happy or satisfied, and more about finding out what they learned or will apply in their daily lives.

The data collection methods listed in the chart on pages 66 - 70 can be used with a variety of source groups. This is not a complete menu of methods — only some possibilities to get you thinking. Feel free to adapt, design, and add your own, if none of these are suitable. Get creative!

Considering your source group, review the possible data collection methods, and their advantages and disadvantages. It is possible to maximize the advantages and minimize the disadvantages by adapting the method to fit your unique group. Check the boxes beside the data collection methods that could work for your project.

Possible Data Collection Methods	Advantages (✓) and Disadvantages (×)
❑ **Sociogram** Ask people to place themselves on a line according to their experiences or perceptions on a specific subject. *For example:* how comfortable they'll be as a result of what they learned in the session in confronting a friend who is expressing discriminatory or racist ideas	✓ Quick ✓ Gets people moving ✓ Makes a public commitment or declaration ✓ Can be the start of a conversation — part of the review of a segment of your training × Can be a challenge to obtain the most relevant information × Can take time to debrief if the results are unexpected
❑ **Written questionnaire** Use both *open* and *closed* questions. *For example:* Most important lesson I learned; What I found most difficult; What main obstacle I anticipate in applying what I learned; Suggestions for improvement; What age range I'm in (12-14; 15-16; 17-18)	✓ Allows individual opinions to be stated × Takes time × Designing good questionnaires is tricky × Qualitative data is time-consuming to compile and analyze

Possible Data Collection Methods	Advantages (✓) and Disadvantages (×)
❑ **Skit or Role Play** Ask participants to form small groups and role-play some ideas that have been discussed (e.g., strategies for dealing with racist behaviour). Then ask participants to discuss the skits or role plays. What themes emerged? What can we learn from this?	✓ Creative and fun ✓ Allows you to observe what participants have learned ✓ Participants can explore different types of behaviour in a safe environment ✓ Gets people moving ✓ Yields illustrations of real-life difficulties in applying knowledge ✓ Participants share their experiences and knowledge ✓ Makes evaluation part of the activity × Takes time × Difficult to record data × Requires experienced facilitator to deal with sensitive topics that emerge × You may not hear from all the participants
❑ **Popcorn Quiz** Ask participants to call out randomly the answers to your questions, while you record on a flipchart.	✓ Allows you to check whether messages were heard and understood; clarifies and reinforces the messages for participants ✓ You have a chance to correct misconceptions once you've heard from everyone ✓ Quick × Takes crowd control to prevent interruptions by overzealous participants
❑ **Guided Small-group Discussion** Use only a few questions so that you're collecting the same information from everyone, and use a recorder.	✓ Everyone can participate ✓ Allows you to check whether messages were heard and understood; clarifies and reinforces the messages for participants ✓ Allows you to correct misconceptions that arise × Takes time × Some participants may monopolize discussion

Possible Data Collection Methods	Advantages (✓) and Disadvantages (×)
❑ **Informal Conversations** Requesting information from those who come to give feedback, or those who appear less rushed.	✓ Informal sampling ✓ You get feedback from people who are motivated to comment × Your data may be skewed because it doesn't take into account those who didn't feel as strongly one way or another × You need to be sure to ask similar questions of everyone, or the data is not comparable × May be difficult to record
❑ **Close-ended Questionnaire** Use closed, fixed-choice questions, where you offer statements, and the participants indicate how much they agree or disagree with the statement. *For example:* I feel welcome when I come to this community facility. (*Strongly agree, Agree, Disagree, Strongly disagree*)	✓ Quicker than an open-ended questionnaire ✓ Easier for participants, since it is possible to explain the questions in advance when handing it out ✓ Quick and easy to deal with the data × Yields only quantitative data × Designing good questions can be tough × Need to be very careful that the response categories are clear, and understood by your sources
❑ **Dot Chart** Ask participants to rate various items (e.g., knowledge and skills) by placing dots on a wall chart along a scale from *none - lots*, or *0 - 5*. Do a before-and-after to see if the dots moved to assess a change in knowledge or skills.	✓ Quicker than an open-ended questionnaire ✓ Quick and easy to deal with the data × Yields only quantitative data × Need to be very careful that the choices are clear, and understood by your sources × Responses can be ambiguous
❑ **Appreciative Discussion** Ask participants to tell you what they liked best about the content of the session, and how they might apply it elsewhere.	✓ Focuses on the positive ✓ Brings together the creativity and ideas of the group to focus on improving the session for the next group ✓ Allows you to check whether messages were heard and understood; clarifies and reinforces the messages for participants ✓ Quick × May focus on process, rather than on content; questions need to be carefully crafted × Time-consuming to document

Possible Data Collection Methods	Advantages (✓) and Disadvantages (×)
❑ **Human Sculpture** Ask participants to form small groups, and have each small group create a human sculpture that represents a theme they have heard.	✓ Gets people moving ✓ Creative ✓ Can be incorporated into the learning experience ✓ Uses non-verbal skills × Takes time to conduct × You may hear only about the themes that are easy to illustrate × Requires experienced facilitator to probe for deeper information × Requires time to debrief × Difficult to record the data
❑ **Happy / Neutral / Sad Faces** Post large happy/neutral/sad faces on the wall, and ask participants to write comments (e.g., whether their learning met their expectations, and how or why?) on sticky notes, and post them on the corresponding face.	✓ Quick ✓ Anonymous ✓ Gets people moving ✓ Everyone can voice an opinion × Not likely that everyone will respond × Responses can be ambiguous
❑ **Graffiti Wall** Post flipchart paper on the wall with a number of felt pens, and request participants' feedback on the session. You may need to ask a project team member to stand close to the wall, and invite those leaving the event to comment on their observations, reactions, ideas, or emotions about the activity.	✓ Quick ✓ Anonymous ✓ Open-ended ✓ Everyone can voice their opinion if they wish × Not likely that everyone will respond × Responses can be ambiguous × May be difficult to analyze

Possible Data Collection Methods	Advantages (✓) and Disadvantages (×)
❑ **Facilitator Journal or Notes** Most facilitators will be keeping records about their sessions, so if time runs out and you are unable to solicit feedback from participants, facilitators can provide their comments on the session. *For example:* the level of engagement of participants; types of questions asked; suggestions from participants; number of skills demonstrated in consequent activities	✓ Quick ✓ Ensures that the facilitator formally takes the time to reflect on the session and record impressions and lessons learned (if requested in advance) ✓ Allows for concrete sharing of ideas and experience among the team of facilitators giving similar sessions × Subjective × Whenever possible, needs to be compared with participant data to be reliable
❑ **Telephone Survey** The project team has a brief number of carefully worded questions that they ask, over the phone, to a randomly selected sample of those whom the project hoped to influence.	✓ Quick for the survey respondents ✓ Likely to yield reliable data × Time-consuming for the project team to locate respondents and conduct interviews × Questions need to be carefully crafted to avoid bias. × Language barriers could limit participation
❑ **Mail-out Survey** The project team designs a questionnaire that is mailed out to a specified number of people. A mail-out survey is not recommended in many cases, because it is difficult to design well, expensive, and response rates are typically around 5%, so you would need a lot of mail-outs to a lot of people to get enough data to be reliable.	✓ Ability to reach a large number of people ✓ Relatively easy to analyze data ✓ Produces comparable data × Difficult to design good questionnaires × Expensive × Often have low response rates

Step 4: Assembling Your Data Collection Plan

Now you are ready to create a customized data collection plan for your project, using the worksheet on the next page. Review your completed plan to make sure that it is realistic, given your resources.

DATA COLLECTION PLAN

Outcome Statements	Indicators	Data Sources	Collection Methods & Frequency of Collection	By Whom Collected & Compiled	By Whom Analyzed & Frequency of Analysis

Tool 6: Preparing a Diversity Education Proposal

Purpose

To help your group present your project in a proposal.

Description

This tool uses a series of questions to help you understand the kinds of information you will need to include in a project proposal. Suggestions for content are provided. It also refers you to relevant tools in this Guide that may help you to fill in any missing information.

When To Use

When preparing a proposal application.

How To Use

Prior to using this tool, your group will want to investigate the proposal requirements of your prospective funders. Each funder usually has its own requirements. Use any questions that arise during your review of their proposal guidelines to initiate a conversation with a funding officer. You will want to start developing good communications with your funder as soon as possible.

In Step 1, review the types of information funders often want included in a proposal.

In Step 2, go through the questions listed, and identify the information you will need for your proposal. If your group doesn't yet have the required information, refer to the tool suggested to help you develop it. Think about how you will present your proposal in the funder's format. If there is no required format, use the questions provided to develop an outline for your proposal.

BEGIN TOOL 6 HERE

Step 1: Reviewing What Is Required in a Project Proposal

Funding organizations may want to know about your:

- organization as a whole — its vision and mission, its governance and management, its overall budget
- project idea — what is needed, what you will do, what will change once the project is complete
- project rationale — where the project idea comes from, why it is a good idea, and why your organization is in a good position to undertake it
- inputs, activities, outputs, and outcomes
- schedule and process for doing the work
- project budget
- plan for tracking project progress and reporting on it

Step 2: Preparing Proposal Content

Go through the questions on the next page, and identify the information you will need for your proposal.

PREPARING A DIVERSITY EDUCATION PROJECT PROPOSAL FOR FUNDING

1. Who are you? What do you do?

- How your organization's vision and mission fit with the project
- The team — competencies, board members, organizational chart
- Your ability to manage the project successfully — accountability
- How this project will build on past successes and enable you to achieve more

Suggested length: 1 - 2 pages *Reference:* Tool 1

2. What is the context of your project?

- What is happening in your community? What are the most relevant issues and opportunities?
- The people and groups affected by the project
- Partners, resource people, other potential supporters in the community

Suggested length: 1 - 2 pages *Reference:* Tools 1 and 2

3. Where do you want to go?

- The long-term outcome of your project: What will the community look like 3 - 5 years after the project is completed?

Suggested length: 1 paragraph *Reference:* Tool 3

4. What are your activities and anticipated outcomes?

- What you are going to do in the project: 5 - 8 activity statements, each with a paragraph including a time frame for completion
- What you are going to change through the project: outputs and outcomes

Suggested length: 1-2 pages, plus an Outcome Measurement framework and a schedule
Reference: Tool 3

5. How will you monitor and evaluate the project?

- Data collection plan: indicators, data collection methods, and sources
- How you will share what you learn from the project, and who will get the information

Suggested length: 1-2 pages, plus a table showing data collection plan
Reference: Tools 4, 5, 7, and 8

6. What is your project budget?

- The inputs necessary for the project: human and physical, including in-kind contributions, such as volunteer hours, facility, equipment
- Identify contributions of others, such as funders or partners

Suggested length: 1 page with a budget table *Reference:* Tool 3

7. How is your project linked to the funder's objectives and mandate?

- The case for how this project helps the funding organization meet its objectives
- Reasons why they should fund this project

Suggested length: 1 concluding paragraph

Tool 7: Sorting, Compiling, and Analyzing Your Data

Purpose

To help your group obtain the most relevant project management and reporting information from your data collection efforts.

Description

This tool presents a three-step process to handle the data you have collected. It looks at sorting, compiling, and analyzing your data so that you can use it to improve your project management and reporting.

When To Use

When you have gathered data according to your data collection plan.

How To Use

In Step 1, review the questions about sorting your data. You will want to carefully consider what information is essential for you to know. Answer the questions provided to help plan how you will sort the data.

In Step 2, review the information about compiling data. Decide what is the most cost-effective and labour-effective way to handle your data. Discuss with your group the most effective way to distill the data you've gathered into useful information.

In Step 3, review the information and ideas about analyzing data. Develop your findings, and work through recommendations with your group. Based on your analysis, make any necessary changes to the project. Keep your key stakeholders, including your funder, aware of any changes your are making, and why you are making them.

After you've gone through the process once, review your data collection plan, and make any necessary changes.

BEGIN TOOL 7 HERE

Step 1: Sorting Your Data

Review the information below regarding the data you have collected.

First and most important rule:
If you are not going to use the data, don't gather it!

1. In order to use your resources effectively, decide with your project team which data is:
   - essential to know
   - nice to know
   - not important to know

   Is it possible that you may have gathered more data than you need? This is a good learning experience, and helps with the planning for the next time.

2. Are there groups within your data sources that should be looked at separately, so that you're not comparing apples to oranges?

   For example:
   - meeting minutes where the chairperson was not present and those where he or she was present
   - rural audiences and urban audiences
   - women and men

   Sort your primary data (records or response sheets) into categories.

3. Decide how much data you need for a reliable picture of progress toward your outcomes.

   Do you need to take a sampling of the primary data so that you're not overwhelmed with the next stages? Would drawing every 10th record or response sheet at random from the pile give you enough data to accurately know what's happening in your project?

Step 2: Compiling Your Data

Compiling means putting together similar pieces of data so that they can be compared.

For example:

- If there are several questions on a feedback form, you may want to compile all of the answers to each specific question separately, in order to get a sense of the overall response.
- If, however, you want to see to what degree participants have gained new knowledge and skills from a session, you may want to aggregate each person's scores on the feedback form, rather than compiling the data by question.

1. Review your data, and decide what similar pieces will need to be compared. The less you have to re-record data, the better. Is there a way you can collect the pieces without re-recording them?

2. Depending on how much data you have, you may also have to develop categories, so that tallies can be made of the responses. This turns *qualitative data* (information about feelings, perceptions, motivations) into *quantitative data* (information about things that can be counted).

   What categories will you use to compile your data?

3. How will you store similar pieces of data?

   One low-tech way to compile data is to photocopy all your response sheets (keep the originals as part of your project records), and cut up the sheets so that each separate question and answer are together.

   A simple database can also be set up to compile and store data. This takes some preparation, but will make it easier to manage large quantities of data.

Step 3: Analyzing Your Data

This is the exciting part, where your project team looks at the information gathered, and makes decisions based on what is happening.

1. At this stage, gather your team together to debate and critically analyze why you are doing what you are doing, and whether or not you are generating the outcomes you want.

   This can be very effective for re-connecting the members of your project team and stakeholders to their desired outcomes, and re-affirming common direction. It is also a concrete demonstration of how much the opinions and experience of each member of the project team are valued — don't let this opportunity pass!

2. With your team, look at what the information says, and determine your findings.

   For example:
   Responses to your question, "What is the most important thing I learned?" might be:

   - 70% of respondents felt that "incidents of racism need to be challenged"
   - 20% of respondents felt that they "learned some effective strategies to challenge racist incidents"
   - 10% of respondents felt that "racism is bad"

   Therefore, your *finding* is that the majority of respondents learned that "incidents of racism need to be challenged," although some learned "effective strategies to challenge racism," and some became aware that "racism is bad."

3. With your team, decide what the information means, and develop conclusions and recommendations.

   Using the example above, your *conclusions* about this depend entirely on the initial intent of your activity:

   - If your education session was aimed at raising awareness, then it was successful – 80% of your participants came away more aware that racism should be challenged.
   - However, if your education session was aimed at giving participants strategies to challenge racist incidents, and only 20% of them responded that they learned some new strategies, then the session was not very successful.

Your *recommendations* for future programming depend on why your project team thinks the results occurred:

- Was it because the session was too advanced for your audience? If so, how would you ensure that this doesn't happen again?

- Was it because the session spent too much time on awareness raising, which most people didn't need, and too little time on strategies? How does the session need to be changed accordingly?

- What else might the findings mean?

Deciding on the particular meaning of the data is very tricky — it may mean one thing to one person, and another thing to someone else. It is important to get as many viewpoints as possible to be sure of an accurate interpretation as a basis for recommendations, reporting, and planning.

Considerations

As much as your budget and time will allow, try to ensure that team members and representatives from your stakeholder groups have the opportunity to participate in a data analysis session at least once per project cycle.

Start the meeting with the least expected findings, so that your group has time to carefully examine all the factors behind those findings, and collectively learn from them.

Some of the data may be quite dry and fairly expected. Don't spend your meeting time on this. Schedule it for the end of the meeting, report it, and move on — though always be prepared for the odd surprise.

Notes

Tool 8: Reporting Your Outcomes

Purpose

To help your group document the changes the project has made, as well as the learning and experience gained, for yourselves, your funders, your participants, and other stakeholders.

Description

This tool sets out questions to help your group focus on what the audience of your report needs to know. It gives suggestions for content and format of your report, including an Outcomes Reporting template. An example of an outcomes-based report is included in the tool.

When To Use

When you are ready to report on your outcomes. You will probably be reporting at regular intervals throughout the project, as well as at the mid-term and end of the project.

How To Use

In Step 1, determine with your group the audience of the report.

In Step 2, decide on the most appropriate format for your audience.

In Step 3, clarify your content, focusing on what has changed as a result of your project.

BEGIN TOOL 8 HERE

Step 1: Defining Your Intended Audience

The first step for any report is to clarify the primary audience of the report.

Is your report primarily intended for:

- stakeholders
- project partners
- board of directors
- funders
- clients
- members
- volunteers
- all or some combination of the above groups

Step 2: Deciding on the Most Appropriate Format

What are the formal reporting requirements (if any) of each of the above groups? Are there report formats or guidelines in place?

The same reporting format will not work for all audiences. Consider what group you are reporting to, and what is the most effective way of communicating with them. You will need to consider such things as:

- level of detail required
  Is this an interim or final report, or one in a series of reports on this project? Is the report for an internal audience with some knowledge about the project and situation, or to an external audience with none?
- amount of time available for reading the report
- comfort with types of language
  (e.g., academic language, technical terms, acronyms, simple English)
- appropriate tone
  (e.g., formal, informal)

For example, while you might need to submit a formal progress report or annual report to your funder, this may not communicate very well to project stakeholders or participants. Consider including a brief Executive Summary that summarizes findings, and ensure that your outline is very clear so that people can choose to read the sections that are most relevant to them.

Consider other ideas for creatively reporting your project progress and outcomes, depending on your audience:

- project bulletin
- video
- stories or testimonials
- oral presentation
- computer slide show presentation

Step 3: Determining Your Content

While you may be used to reporting on activities, (e.g., We conducted 5 public awareness sessions this quarter), you will want to place more emphasis on your outcomes. In other words:

- What difference did your activities make?
- What did you learn?
- What would you do differently next time, or advise others to do differently if they were attempting the same project?
- What was expected; what was unexpected?

Suggested Outcomes Reporting Format

1. **Activities:**
   Describe the activities you conducted in this reporting period.

   > *For example:*
   >
   > Designed and delivered anti-racism workshops

2. **Outputs:**
   Include your output data here.

   > *For example:*
   >
   > 5 one-day workshops conducted, with a total of 80 participants attending

3. **Expected Outcomes:**
   Insert your expected outcomes from your Outcome Measurement framework here.

> *For example:*
>
> The audience's expectations of content and format are met.

You are likely to have more expected outcomes than this; however, for the purposes of this example, we have deliberately kept it simple.

4. **Indicators, Sample Size, and Methods:**
   Include the indicators you used, as well as the sample size and method used to gather your data.

> *For example:*
>
> Indicator used:
> level of audience satisfaction regarding content, resource persons and materials, style of delivery, facilities
>
> Sample size:
> 25% of workshop participants completed surveys.
>
> Method used:
> questionnaire

5. **Findings:**
   Insert your findings here.

> *For example:*
>
> Overall,
> - 70% of respondents were highly satisfied with the workshop.
> - 20% of respondents were somewhat satisfied with the workshop.
> - 10% were somewhat dissatisfied with the workshop.
>
> In general, participants were satisfied with the enthusiasm and knowledge of the facilitators, and the way the subject matter was presented. Specific dissatisfaction arose from the fact that participation was not voluntary; participants were required by their supervisors to attend.

6. Analysis:

Provide the analysis of your findings here. Are the results positive or negative? Has this project moved you closer to your desired intermediate and long-term outcomes? What could you have done differently?

> *For example:*
>
> The workshop participants were drawn from various departments by their supervisors. Participation was not voluntary, and a lot of resistance was expressed during the initial exercise of the workshop to explore expectations. Considering this, the satisfaction rate is very high.
>
> However, if we had debriefed the participants after the morning and afternoon sessions, it may have allowed 'resistors' to move beyond their resentment of their forced participation into a discussion of what they were learning, and how and whether it might be useful to them. The high satisfaction rates may make participants more willing to pursue further training in this area.

You might also include a discussion of what helped or hindered your project during this period, and any insights you have about effective practices that should be considered in the planning of your next project.

> *For example:*
>
> It would have been helpful if the workshop facilitators had known about the methods used to encourage participation, and the fact that attendance was mandatory. For any future anti-racism workshops in the workplace, the workshop design must take into account how much resistance is likely to exist among participants, and what specific techniques will be used to draw that out and deal with it positively.
>
> We expected more participants for the workshops – at least 15 at each one, for a total of 75. A snowstorm on the day of workshop #2 (coupled with the involuntary registration) meant that only 10 of our anticipated 20 participants arrived. In addition, there was a fire on the floor in the packing plant two days before workshop #3, and 18 participants from that department were unable to attend the subsequent workshops.

7. Unintended Outcomes:
What happened during the course of the project that you didn't anticipate — either positive or negative?

> *For example:*
>
> It was understood by the facilitators that supervisors had already received anti-racism training, and were comfortable with their knowledge and skills in this area. After reviewing the feedback from their staff who participated in the workshop, three of the five supervisors asked if the facilitators could design a training program for them. They requested that the basics be covered in this workshop, as well as strategies for intervening within teams when issues arise. These supervisors have discussed this with their department heads, and have found money in the budget. They are discussing the design with all the supervisors at their level for three one-day workshops to be held over the next six months.
>
> Two of the participants in the workshop have raised team issues with their supervisors, and facilitators have consulted on ways to constructively address these issues with the team. These issues may be used as case studies in the supervisor workshops.

8. Conclusion:
Briefly summarize your report here.

> *For example:*
>
> Participants in these training sessions were, for the most part, satisfied with the training. Lessons were learned about how to plan for and overcome resistance, and about clarifying, in advance of sessions, how trainees will be recruited to attend.
>
> As a result of this training, further sessions are being developed to work with employees at the supervisory level, and two teams are in the process of addressing issues that were highlighted in the anti-racism training sessions that had previously been disregarded.

Outcomes Reporting Template

A reporting format template is provided on the next page. This template is not exhaustive. For example, it does not include financial reports, so you must customize it for your specific reporting needs.

OUTCOMES REPORTING TEMPLATE

1. **Activities:**
   Describe the activities you conducted in this reporting period.

2. **Outputs:**
   Include your output data here.

3. **Expected Outcomes:**
   Insert your expected outcomes from your Outcome Measurement framework here.

4. **Indicators, Sample Size, and Methods:**
   Include the indicators you used, as well as the sample size and method used to gather your data.

5. **Findings:**
   Insert your findings here.

6. **Analysis:**
   Provide the analysis of your findings here. Are the results positive or negative? Has this project moved you closer to your desired intermediate and long-term outcomes? What could you have done differently?

7. **Unintended Outcomes:**
   What happened during the course of the project that you didn't anticipate — either positive or negative?

8. **Conclusion:**
   Briefly summarize your report here.

Useful Resources

This section contains a list of useful resources. These resources are categorized into two major groups:

- Diversity Education Resources
- Outcome Focused Planning, Management, and Evaluation Resources

Diversity Education Resources

Community Engagement

Long Term Anti-Racism Strategies: A Guide to Developing Effective Community Projects. Contains useful resources and strategies for community initiatives. http://www.amssa.org

Project Learnings Report: Community-Based Long-Term Anti-Racism Strategy Development — Demonstration Project. This report charts the local initiatives of three B.C. communities that developed long-term anti-racism strategies. http://www.amssa.org

Tamarack. Tamarack is a charitable organization dedicated to helping Canadian communities take ownership of local issues. The Learning Centre is designed to disseminate knowledge gathered through research and practical experience; to help communities increase their power through learning; and to generate knowledge about community engagement. http://tamarackcommunity.ca

Tolerance.org. An on-line source for people interested in creating communities that value diversity. Contains useful resources on how to transform yourself, your home, your school, your workplace, or your community. http://www.tolerance.org

W.K. Kellogg Foundation. A nonprofit organization whose mission is to build the capacity of individuals, communities, and institutions to solve their own problems. Contains Communications, Evaluation, and Policy Toolkits. http://www.wkkf.org

Diversity Education

Diversity Education Research Project Literature Review and **Diversity Education Research Project Final Report**.
The Diversity Education Research Project was implemented from January 2002 until September 2003. The two documents above came out of this project, and contain valuable information for organizations engaged in Diversity Education. http://www.plannet.ca

General Resources

Canadian Anti-racism Education & Research Society. Contains a learning resource centre on the web, including research, resources, many links to other sites and organizations, plus a calendar of workshops offered. http://www.antiracist.com

Canadian Ethnocultural Council. Includes a number of publications on diversity related issues, including reports, fact sheets, guides, and a handbook on diversity education for children. This site is also available in French. http://www.ethnocultural.ca/publications

Culture — Canada's Cultural Gateway. Includes a section of resources on the diversity of Canada's people. Also available in French. http://www.culture.ca

La Diversité Culturelle. The Quebec Ministry of Communications and Culture hosts this French site that contains news, publications, and studies related to cultural diversity. http://www.mcc.gouv.qc.ca

The Metropolis Project. Includes comparative research and public policy initiatives about population migration, cultural diversity, and the challenges of immigrant integration in cities in Canada and around the world. Also available in French. http://canada.metropolis.net

Media Awareness

How to Respond to Bias in the Media: An AMSSA Manual. Provides information and strategies for dealing with the media. http://www.amssa.org

Diversity Watch. The Ryerson University School of Journalism's Diversity Watch is dedicated to improving the relationship between minority groups and the Canadian media. Contains a directory of organizations engaged in diversity education, and a glossary. http://www.diversitywatch.ryerson.ca

Organizational Change

Best Practices in Diversity Strategies and Initiatives. A synopsis of research on organizational diversity initiatives. http://www.uscg.mil/hq/g%2Dw/g%2Dwt/g%2Dwtl/summit/speech2.htm

Canadian Union of Public Employees. Provides articles, research, and a fact sheet about personal, workplace, and national initiatives against racism. Also available in French. http://www.cupe.ca

Cultural Competency: A Self-Assessment Guide for Human Service Organizations. A practical cultural competency assessment for human service organizations. http://www.cd.gov.ab.ca

Cultural Diversity in Organizations and Business: Gaining a Competitive Advantage: A Primer. A primer for groups and businesses wishing to promote diversity within their organizations. http://www.amssa.org

Public Awareness Campaigns

Action Week Against Racism. Includes information on the March 21 campaign across Quebec, as well as links to other organizations. Available in English and French. http://www.inforacisme.com

Advantage Diversity. An organizing tool for agencies and individuals working on anti-racism activities throughout British Columbia. http://www.amssa.org/advantage_diversity

Global Human Rights Education Network. An electronic resource centre with human rights education and training materials, on-line forums, databases, and links to other organizations and resources. http://www.hrea.org

Listening to Our Neighbours Programs. Information on the principles that guide listening projects and help with formulating strategic questions. http://www.co-intelligence.org/P-ListenToNeighbors.html

Peace Starts. A media and communications package from the Affiliation of Multicultural Societies and Service Agencies of B.C. http://www.amssa.org

Youth Programs

Edna McConnell Clarke Foundation. The Edna McConnell Clark Foundation helps nonprofit organizations increase their capacity to serve young people from low-income backgrounds. The site contains information on their youth development grant making strategies and the organizations they support. Contains organizational capacity assessment, evaluation, and research tools. http://www.emcf.org

Human Rights Education and Compass, a Brief Guide for Practitioners. A user-friendly manual for developing youth-focused human rights education programs. This site is also available in French and Spanish. http://eycb.coe.int/compass

Media Awareness Network. Resources and support for everyone interested in media and information literacy for young people. Includes resources for parents and teachers. Available in English and French. http://www.media-awareness.ca

Maytree Foundation. Contains publications and resources on issues such as human rights, immigrant settlement, and refugee policy. http://www.maytree.com

Racism No Way. Contains materials developed by Australian teachers for use in the classroom, as well as a games room for youth. http://www.racismnoway.com.au

Outcome Focused Planning, Management, and Evaluation Resources

Data Collection and Sampling

Creative Research Systems. http://www.surveysystem.com/sscalc.htm

Lancaster University's Statistics Glossary.
http://www.cas.lancs.ac.uk/glossary_v1.1/main.html

Ethical Research Issues

Ethique de la recherche sociale: consentement libre et eclaire confidentialite et vie privee. A downloadable guide from the Quebec government on ethics in social research.
http://www.fqrsc.gouv.qc.ca/pdf/ethique190902.pdf

InterAgency Advisory Panel on Research Ethics. Contains the Tri-Council Policy Statement: Ethical Conduct for Research Involving Humans, which describes standards and procedures for governing research involving human subjects. Site also available in French.
http://pre.ethics.gc.ca

Personal Information Protection Act. Contains information about the Personal Information Protection Act, which applies to non-profit organizations in Alberta. http://www.oipc.ab.ca/pipa

Personal Information Protection and Electronic Documents Act. This site is also available in French. http://www.privcom.gc.ca

General Resources

Benton Foundation. **Strategic Communications in the Digital Age**.
http://www.benton.org/publibrary/toolkits/stratcommtool.html

Charity Village. Contains a variety of guides, publications, and other resources for non-profit organizations. Some information available in French. http://www.charityvillage.com

International Development Research Centre. Includes resources for organizational evaluation, including frameworks and guidelines in French and English. http://www.idrc.ca

Management Assistance Program for Nonprofits. A site dedicated to management and board recruitment for nonprofits. Also includes a Free Management Library, which provides on-line planning, management, and evaluation resources tailored to non profit organizations. http://www.mapfornonprofits.org

The Community Tool Box. This Tool Box provides over 6,000 pages of practical information to support community-based work. Also available in Spanish. http://ctb.ku.edu

Outcome Measurement

Splash and Ripple: Using Outcomes to Design and Guide Community Work. A user-friendly handbook designed to assist community-based organizations to understand and apply Outcome Measurement to their work. This handbook is available in English and French. http://www.cd.gov.ab.ca

Splash and Ripple: Performance Management Workshop Training Primer. Contains information on the theory and language of Outcome Measurement, and how to apply it. http://www.plannet.ca

Canadian Outcomes Research Institute. This website describes the work of this Canadian non-profit educational and research organization in four key areas: education services, HOMES database, resources, and research. Click on *resources* to access various tools that can assist in implementing outcome-based planning and management. http://www.hmrp.net/canadianoutcomesinstitute

MandE News. A news service focusing on developments in monitoring and evaluation methods relevant to development projects and programs with social development objectives. http://www.mande.co.uk

Results Based Management E-Learning Tool. A downloadable tool from the Treasury Board of Canada to help understand and use Results Based Management. The tool is also available in French. http://www.tbs-sct.gc.ca/eval

Results for Canadians: A Management Framework for the Government of Canada. This Treasury Board Secretariat document is particularly important for those implementing Outcome Measurement with federal government support. It sets out a framework for management in the Government of Canada, and an agenda for change in the way that departments and agencies manage and deliver their programs and services. Also available in French. http://www.tbs-sct.gc.ca/res_can/rc_e.asp

United Way of America's Outcome Measurement Resource Network. The website offers information, downloadable documents, and links to resources related to the identification and measurement of program-level and community-level outcomes. http://national.unitedway.org/outcomes

Voluntary Sector Evaluation Research Project. This website serves as a resource centre for evaluation models, frameworks, and tools, and provides a discussion forum for issues related to assessing performance in voluntary organizations. The section *VSERP research* contains new evaluation resources, which provide guidance and practical advice to voluntary organizations in making strategic choices about assessing their performance. Also available in French. http://www.vserp.ca

The following foundations have also done work in the area of Outcome Measurement, and have useful resources on their websites:

Canadian Centre for Philanthropy. Also available in French. http://www.ccp.ca/

United Way of Canada. This site is also available in French. http://www.unitedway.ca

The following websites contain information on how to conduct outcome-focused evaluations:

Evaluating Outcomes and Impact: A Scan of 55 Leadership Development Programs. http://www.wkkf.org/Programming/ResourceOverview.aspx?CID=148&ID=3780

Online Evaluation Resource Library. http://www.oerl.sri.com

Targeting Outcomes of Programs (TOP). Also available in Russian, Spanish, and Chinese. http://citnews.unl.edu/TOP

Internet Resources for Nonprofits, Utica Public Library. Provides free Internet resources for and about nonprofits. http://www.uticapubliclibrary.org

Questionnaire Design

Georgia Institute of Technology.
http://www.cc.gatech.edu/classes/cs6751_97_winter/Topics/quest-design

Survey Research. http://www2.chass.ncsu.edu/garson/pa765/survey.htm

For information about designing questionnaires:

Issues in Questionnaire Design.
http://www.ed.uiuc.edu/SPED/TRI/questionnaire.htm

Survival Statistics. http://www.statpac.com/surveys

Designing Surveys and Questionnaires.
http://www.knowthis.com/research/survey