Setting Impact Goals

This tool is for leaders supporting their faculty, division, department or unit's[i] implementation of the Equity Action Plan (EAP). It provides the information and steps to follow during activity planning to set an impact goal and preparing to assess an activity.[ii]

Overview

Knowing whether your projects are achieving their intended results is always important. While working to advance the Equity Action Plan goals and actions, it is crucial to assess the extent to which your efforts are contributing to equity, diversity and inclusion.

While there are many ways to assess or evaluate a project, for activities in support of the EAP we are asking units to assess for impact. Included in the Implementation Framework is the following phase:

Assess for impact: Assess both intended and unintended impacts. Evaluate signals of change to determine if your impact goals have been met.

During the Plan phase of the implementation, it is important to determine an activity's intended impact so that once your activity has been launched you are prepared to begin assessment. This resource will provide you with the relevant information to set activity's impact goal and plan for assessment. As you work through the following two steps, refer to the example provided at the end of this resource and fill out the Impact Assessment Plan Template.

Why assess for impact?

Work to advance equity, diversity and inclusion (EDI) can be slow-moving and complex. Change is often incremental and not always linear. In this context, assessment is a useful tool for ensuring that you are still 'on track' and should not be delayed until your initiative is complete. Overall, assessment can:

- improve your work and making it more effective,
- signal when you may need to adapt as conditions around your activity change,
- identify interim achievements that are worth celebrating,
- support effective resource allocation and identify where to focus next, and
- ensure accountability to the people working in or with your unit and those you serve.

Often organizations and groups focus on highlighting how much effort, resources and money go into supporting EDI initiatives. However, measuring inputs does not tell us how successful an initiative has been in leading to the intended change or impact. By focusing specifically on impact, we can assess whether activities are meaningfully contributing to the goals of the EAP.

Step 1: Determining your impact goal

Through your unit-level ideation and prioritization of activities your unit may have already articulated the purpose of your activity and what change you are hoping it will make. Now as you plan your activity, you will set an impact goal to support its future assessment. To do this, discuss:

- Why are we undertaking this activity?
- What change(s) are we working to achieve?
- What will be different when our activity has been successful?
- Who do we hope will be positively impacted by this activity? In what ways?
- How will this activity advance the goals of the Equity Action Plan?

Based on your responses to the above discussion questions, put together an impact goal for your activity. An impact goal should reflect what your activity hopes to accomplish by focusing on who will be impacted and in what way. Try to be concise and aim for only one sentence.

Throughout planning, it is normal for your initial activity idea to shift and change. An impact goal can be a helpful tool to revisit when making decisions to remind you of what you are trying to accomplish.

> **Asking 'why' to get to the impact goal**
> In the Example Impact Assessment Plan below, the activity is "Increase 2SLGBTQIA+ anti-oppression training opportunities for advisors." When developing an impact goal, a unit might mistakenly stop at a statement like "Advisors will have increased understanding of 2SLGBTQIA+ experiences." While this goal does explore the activity's impact it does not reflect <u>why</u> the unit has undertaken this activity in the first place. A more fitting impact goal would be "Welcoming and relevant supports will be readily available for 2SLGBTQIA+ students in our advising services."

Step 2: Gathering evidence to track impact

Signals of change

Based on your activity's impact goal, identify 1 to 3 'signals of change.' These signals should help you determine if you are on track towards your impact goal. Consider what interim changes or components of the larger impact goal you expect to see along the way towards your intended impact. For example, selected signals might include changes in behaviours, attitudes and/or patterns.

Importantly signals of change are different from progress milestones used in typical project planning. To understand the difference, review this example based on the Example Impact Assessment Plan:

	Signals of change	Progress milestones
Purpose	Track advancement towards the impact or change you are hoping your activity will make (i.e., your impact goal).	Track the completion of planning steps or the achievement of arbitrary targets.
Example	"Advisors in our unit actively seek out training and education on 2SLGBTQIA+ experiences."	"70% of Advisors in our unit have completed training and education on 2SLGBTQIA+ experiences."

As you choose your signals of change, think about the time frame (short-term, long-term) or at what stage of your activity you might expect to see this. For large or complex activities having a variety of signals creates more opportunities to gauge your progress and determine if any changes to your activity are needed.

Corresponding evidence

Name corresponding pieces of evidence you plan to collect to determine if the expected changes (i.e., your signals of change) are happening. Keep in mind that your evidence could be:

- **Quantitative:** something you can count or describe with numbers
- **Qualitative:** something that needs to be described through story, illustrative example, or thematically

For each piece of evidence, determine how you will collect the information and who will collect it (for example, administrative data, evaluation surveys, meeting notes, focus groups, etc.). Consider existing sources of data or if you can build data collection into your activity.

Planning for analysis, learning and communication

Document at what points you will analyse your signals of change, how you will make sense of the information you collect, and how your analysis will inform future decisions.

The definition of accountability included in the Implementation Framework principles states:

> *"At UVic, we will strive to be accountable by practicing transparency and working to build relationships and trust. We understand that accountability must include a commitment to communication, to learning, to reflexivity, to receiving feedback and to action."*

Living up to this commitment requires that we practice transparency throughout assessment, and plan for how we will communicate, successes, failures and learnings to others. There may be parts of your assessment that cannot be shared publicly for privacy and confidentiality reasons so we encourage you to think now about what parts you can share.

Questions?

Find the Implementation Framework and full list of tools on the Equity Action Plan website. If you get stuck or are not sure what the next step is for your unit, help is available. The Equity Action Team can assist with coaching and troubleshooting. Email us at equityaction@uvic.ca

Example Impact Assessment Plan

Fill out the attached template to help you organize your impact goal and plan for gathering evidence. The following example is provided to help you work through the template for your own activity.

Activity: **What is your activity?**

Increase 2SLGBTQIA+ anti-oppression training opportunities for advisors.

Impact goal: **What will be different when our activity has been successful?**

Welcoming and relevant supports will be readily available for 2SLGBTQIA+ students in our advising services.

Signals of change:

What signals, or components of the larger change/impact, do we expect to see?	What information will we collect?	How will it be collected?	Who will collect it?	When will you assess this signal?
Signal #1: Advisors in our unit actively seek out training and education on 2SLGBTQIA+ experiences	How many advisors have participated in voluntary training?	Tracking workshop attendance	Administrative staff	Three months after initiative has launched (October)
Signal #2: Advisors are actively integrating their learning into their daily practice	Feedback from advisors with examples of how they have implemented their learnings	Ask advisors to discuss this in a staff meeting	Manager #1	After at least 50% of advisors have completed some form of training
Signal #3: Differentials between how heterosexual and 2SLGBTQIA+ students experience our services has reduced (and is eventually eliminated)	% heterosexual students satisfied with our support and % 2SLGBTQIA+ students satisfied with advising services	Student feedback survey distributed after each advising appointment	Manager #2 will compile data into term summary reports	1 year of after training is launched

Analysis: **How will we analyze and make sense of this information?**

Signal #1 will let us know if staff are starting to opt-in to learning more about issues related to 2SLGBTQIA+ communities training, if there is low participation, we may need to adjust our communication strategies, etc. By gauging how advisors are integrating their learning into their daily practice we will know what gaps may exist and require additional strategies. Finally, the working group will discuss the results from the experience survey.

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

Staff member #1 will circulate the summary of our evaluation to all decision-makers. We will revisit the main findings during planning sessions. When our learnings lead to adjustments or changes in our initiative, we will document this and include it in communications about our evaluation. We will use what we have learned from the evaluation of this activity to inform subsequent activities.

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

Staff member #2 will create a summary of our key insights and get feedback from the working group. We will share this with all staff and faculty working in our unit, as well as key students who have provided input on the project. If we feel our learnings have been significant, we will seek ways to share them with others in the UVic community, by submitting a Community Action Update on the Equity Action Plan website and sharing through our newsletter.

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[i] For the rest of this document, we use "unit" as the generic term for units, departments, faculties, and divisions, and other relevant UVic groups.

[ii] This resource is adapted from University of British Columbia (2021). "Tracking Progress and Learning from your EDI Initiatives." Accessed at: https://equity3.sites.olt.ubc.ca/files/2021/05/Tracking-Progress-and-Learning-from-your-EDI-Initiatives.pdf

Impact Assessment Plan Template

Activity: **What is your activity?**

Impact goal: **What will be different when our activity has been successful?**

Signals of change:

What signals, or components of the larger change/impact, do we expect to see?	What information will we collect?	How will it be collected?	Who will collect it?	When will you assess this signal?
Signal #1:				
Signal #2:				
Signal #3:				

Analysis: How will we analyze and make sense of this information?

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

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

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