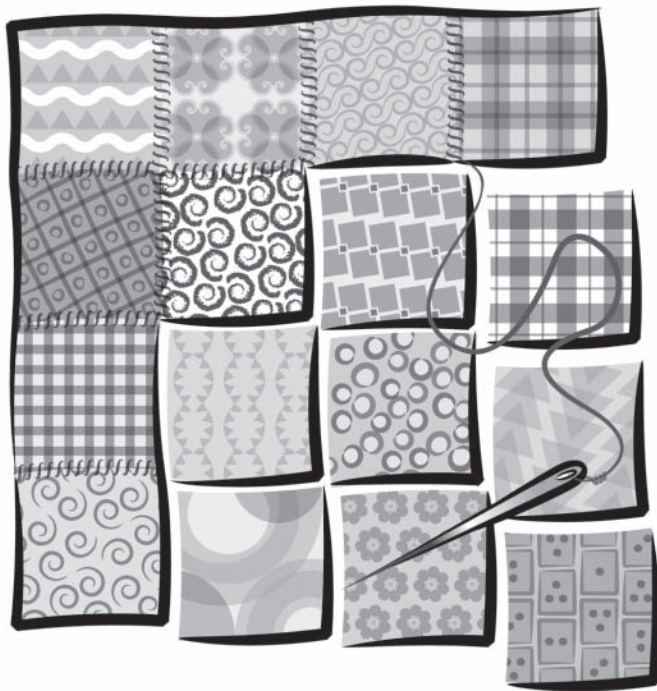

II. AN ORGANIZATIONAL CHANGE STRATEGY



Overview of the Organizational Change Process

- What Exactly Is Diverse and Inclusive Organizational Change?
- Embarking on Inclusive Organizational Change

Steps to Inclusivity

- A. Preparing for Change
- B. Research and Assessment
- C. Planning for Change
- D. Making It Happen
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Overview of the Organizational Change Process

What Exactly is Diverse and Inclusive Organizational Change?

Creating inclusive organizational change involves “a planned approach to developing and implementing inclusive policies, programs and practices adapted to the needs of a diverse community”. Change of this sort touches the entire organization, from broad policies and procedures to day-to-day activities. It filters through all facets or components of an organization, including programs and services, communications, community relations, human resources and personnel, governance and policy.¹³

There is no one right way to go about this process, and at times some of the actions may seem contradictory or in conflict with one another. Organizations will have to work through these contradictions and arrive at solutions that are both appropriate and consistent throughout the organization. What works for one organization or in one situation will not necessarily work in another; therefore, knowledge of internal dynamics of the organization and the context within which it operates is very important.

While there is no “cookie-cutter” approach to becoming more diverse and inclusive, there are guidelines within this Tool Kit that can be followed and adapted to the individual circumstances of each organization. Becoming a diverse and inclusive organization is an *ongoing* process, and it is unlikely that there will be a point at which you can state that you are now a fully diverse or inclusive organization. The process is really about developing the *capacity* to become more diverse and inclusive, which will help to ensure that issues of inclusivity are considered on a regular basis.

Embarking on Inclusive Organizational Change

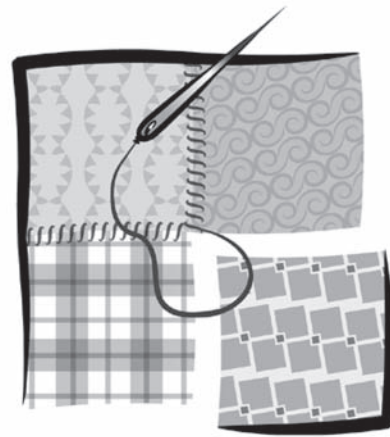
An organizational change process is both active and planned. It cannot be approached in a passive or random manner, or as something that is just “added on” to the work that is already being done. Although initially it may start out as an added-on task, the goal of this process is to integrate diversity and inclusion into your overall mandate so that it eventually filters throughout the organization.¹⁴

¹³ Canadian Heritage website, http://www.canadianheritage.gc.ca/index_e.cfm May 2001

¹⁴ “Inclusivity Organizational Change Overview”. Coalition for an Inclusive Community. United Way of London & Middlesex. 2001

Creating a diverse and inclusive organization and workforce requires time, money (although it need not be a lot), energy, commitment and tenacity. It will likely involve a combination of formal and informal approaches to organizational change and may be tackled one step at a time. It could first be applied to one particular group or community that is not presently included; e.g., a particular race, class, gender, age, ability, religion, or sexual orientation.

Each person within your own organization likely has a different level of experience and understanding of issues of diversity, equity and inclusion. Encourage personal as well as organizational commitment, as self-awareness and humility are key requirements to success. Everyone within the organization needs to become open to learning about and changing their individual perceptions of themselves and those around them. Recognize and accept that you are going to make mistakes, but acknowledge that we can learn from our mistakes. Most importantly, be patient with both yourself and others. All of this can assist your organization to successfully engage individuals and groups who do not currently participate.



Steps to Inclusivity

To assist your organization in planning your change strategy, a series of steps are listed below as a guide. We have included a variety of formal and informal approaches that address different aspects of your organization. Some may not be appropriate or desirable to undertake at present, and may be postponed or skipped

altogether. Although the “steps” for creating inclusive organizational change are presented in a logical order of progression, it is not important that all of the steps be followed sequentially, but rather that they be applied as part of an ongoing and cyclical process.

A. Preparing for Change

1. Raise the Issue
2. Address Any Initial Opposition
3. Make the Commitment
4. Document the Commitment
5. Communicate the Commitment
6. Establish a Steering Committee
 - *Terms of Reference*
 - *Shared Understanding and Vision*
 - *Leadership*
 - *Involvement*
 - *Education and Training*

B. Research and Assessment

7. Review the Literature
8. Create a Community Demographic Profile
9. Conduct a Survey of Your Community
10. Assess Your Organization

C. Planning for Change

11. Develop Your Plan
12. Create a Communications Strategy

D. Making It Happen

13. Implement the Plan
14. Continue to Deal with Opposition

E. Evaluation

15. Track Your Progress
16. Evaluate the Outcomes
17. Reflect on the Process

A. Preparing for Change

Step 1: Raise the Issue

For any new initiative, someone has to be the first to speak out about a concern or issue that they have identified. Often this is done informally at first, with one person talking to another about it to find out if s/he has a similar perception and would be interested in discussing it further with others. The next step may be to ask for the issue to be placed on the agenda of the next meeting.

Step 2: Address Any Initial Opposition

It is likely that people within your organization will raise questions as to why diverse and inclusive organizational change is needed. Some of these questions can be answered by referring to the reasons and benefits provided in the previous section “Rationale for Inclusion”. However, it is possible that there may still be some form of resistance to the change process. Expect discomfort, as change is unsettling. It is important to address these concerns and not to ignore them, as agreement with and commitment to the process by everyone involved is necessary to its success. See Tool #2: “Responding to Opposition” for approaches to dealing with resistance.

Step 3: Make the Commitment

For an organizational change process to be successful, there has to be a strong personal commitment to it by a number of people

involved in the organization, particularly by the leaders or decision-makers. Ideally, all of the individuals involved at the various levels of your organization (board, management, staff and volunteers) should commit to creating and supporting the change.

Step 4: Document the Commitment

A commitment to the process should be made by the board and staff and documented in meeting minutes. The documentation should include a clear statement outlining the outcomes that you are hoping to achieve and the general means by which you expect to achieve them. The details of how, when and by whom particular tasks will be conducted will follow later in the process. At this point, the board should also allocate resources (e.g., money, staff time and/or volunteer contributions) to help fulfill the objectives.

Step 5: Communicate the Commitment

It is crucial to the success of any diversity initiative that not only is the commitment made, but it is also widely communicated throughout the organization and the community. You will need to decide how the commitment for the initiative will be demonstrated and communicated. This may take different forms, for example:

- a memo from the board president or chair to everyone within the organization,
- an announcement at an annual general or other public meeting, or

- an agenda item at board, committee or staff meetings.

Communication should not only occur at the beginning of the initiative, but also at various times throughout the process. Effective communication is an important factor to achieving the desired outcomes.

Step 6: Establish a Steering Committee

A committee will be needed to plan and monitor the process of creating change within your organization. It should comprise individuals from all areas of the organization (staff, board, volunteers and members) so that different perspectives are represented. It may also be beneficial to invite external community members to join the committee, particularly if the organization does not reflect the makeup of the community it serves. However, the committee may want to meet a few times internally first, in order to identify issues, define the organizational goals, identify available resources and establish internal communication and management procedures. If necessary, these can always be altered once feedback is provided by external community members.

To help the committee to run smoothly and effectively, the following actions may be taken:

- establish terms of reference;
- create a shared understanding and vision;
- develop leadership;
- generate involvement;
- conduct education and training sessions.

Establish terms of reference: Terms of reference are used to establish roles, responsibilities and process and meaning within the committee. These terms include decisions about the following:

- the purpose of the committee
- the roles of members
- decision-making procedure
- reporting relationships
- authority and accountability
- resources available
- membership composition
- meeting schedule

Also see Tool #3: “Sample Terms of Reference”.

Create a shared understanding and vision:

At the initial committee meetings, take some time to explore each committee member’s understanding of why your organization would benefit from undertaking this process; what it might look like; what they hope to get out of it; and why it is important to them. Ensure that you develop a *shared* understanding of diverse and inclusive organizational change. Following are some points for discussion and reflection:

- What do we mean by terms such as “diversity” and “inclusion”?
- What are the guiding values, attitudes and principles the organization should convey with respect to diversity and inclusion?
- What are the implications for the organization?

Develop leadership: While leadership at the board level is critical, an effective organizational change process will identify leaders at all levels of the organization and for various aspects of the initiative. The committee will need to designate a chair for the meetings, and someone will need to take responsibility for coordinating all activities.

Generate involvement: As noted earlier, a key ingredient to a successful organizational change process is the involvement of individuals at every level of the organization. Staff, volunteers and members need to be involved in the planning, the decision-making processes and the implementation of any recommendations. It may also be beneficial at this point in the process to consider including others external to the organization. For example, you may want to receive some initial outside feedback on your proposed directions at the planning stage to ensure that you are on the right track.

Conduct education and training sessions: Committee members will probably need to be educated themselves about diversity and inclusion

before they undertake planning an organizational change process. Areas to be addressed could include cultural competency, cross-cultural communications and conflict resolution skills. This training may be headed by committee members if there are one or more individuals who have a strong background in these areas. However, there are benefits to bringing in a professional outside trainer:

- their knowledge may be more up to date;
- training methods may be more developed;
- avoids division within the committee between those seen as knowledgeable and those who are not;
- allows all committee members to participate in the training;
- neutral third party can help diffuse tensions and manage conflicts if they arise;
- the trainer may be able to suggest other helpful resources for the committee.

After going through all of the above stages, the Steering Committee should continue to meet as you conduct research, plan and coordinate activities and engage in the process of creating organizational change.



B. Research and Assessment

In order to make informed recommendations and create an effective action plan, the committee must develop a solid knowledge base. There are several important actions that should be considered at this stage.

Step 7: Review the Literature

Compile and review literature available in the areas of diversity, equity and inclusive organizational change. Check your local library, conduct an Internet search or ask for recommendations from practitioners and researchers that specialize in this area. You might contact other organizations that you know are already involved in a change process relating to diversity and inclusion, and ask if they will share their information and experiences with you. Your local United Way or Community Foundation may also have information that would be useful. Some United Ways in Ontario have taken a leading role in their communities with respect to diversity and inclusion.

Step 8: Create a Community Demographic Profile

In order to assess whether your organization is reflective of the community it serves, you need to know who lives in that community. You may already have a pretty good idea of who makes up your constituency. However, conducting an analysis of the demographic profile of your commu-

nity or catchment area could be beneficial as not all aspects of demographics are visible or easily recognizable.

Information about local residents' age, sex, marital status, employment status, income level, ethnicity, race, religion, language, etc. are available from Statistics Canada, broken down by census areas. More specific information about your particular area may be available through your municipal planning department or district health council. A template is available in Tool #4: "Community Demographic Assessment".

Step 9: Conduct a Survey of Your Community

Once you have determined who lives in your community, reach out to representatives of the various demographic groupings, particularly those that benefit from or contribute to your organization, to request their input. One of the likely purposes of

When asking people for input, be prepared for a range of reactions and be respectful of divergent opinions and perceptions. Respecting another person means acting in a manner that "recognizes the privacy, confidentiality, comfort, autonomy and self-esteem of that person."

- "Guidelines for Assessing Accommodation Requirements for Persons with Disabilities". Ontario Human Rights Commission. August 1989

your initiative is to increase access to your organization, i.e., the ability to receive services, participate in programs, become a member, or have suggestions and concerns taken into account. If this is the case, it is necessary to ask others to identify real, perceived or potential barriers to their participation.

Make sure that you tailor the consultation and involvement process to reflect the communities with whom you are engaging. Establish criteria and procedures for involvement that are targeted and appropriate. There are some guidelines on how to do this in the *Tools* and *Additional Resources* sections of this document (see Tool #5: “Guidelines for Encouraging Diverse Community Involvement”, and the group-specific “Info Sheets” in Section IV). Perhaps not all of these guidelines will be appropriate or necessary for your particular organization, so consider your own circumstances and consult with others to develop your own guidelines.

Depending on the time and resources available, you may consider one or more of the following suggestions for obtaining information about diverse populations in your community and their perceptions of your organization:

- Conduct a representative survey of key stakeholders, community leaders and/or members of local groups, agencies and associations. Try to consult with a wide cross-section of the community including members of different ethno-racial groups,

youth, seniors and people with disabilities. A sample procedure and schedule of questions for key representative interviews is provided in Tool #6.

- Conduct a focus group where you present the basic idea of your initiative and ask for opinions or suggestions both about what to do and what *not* to do. A sample procedure and schedule for conducting focus groups is provided in Tool #7.
- Consult with practitioners and researchers in the area of diversity to increase your knowledge and sensitivity to issues and to obtain recommendations for the initiative.

Engaging individuals and groups from diverse backgrounds at the start of your initiative may facilitate longer-term partnerships that would benefit your organization. Once the contact has been initiated, you could maintain communication with them by updating them on your progress or inviting them to events.

Step 10: Assess Your Organization

This activity will help you to determine how diverse and inclusive your organization is at present. Ideally, the dimensions of the assessment would include:

- qualitative information, such as individual reflections, experiences and stories;
- quantitative information, such as rating scales, rank ordering, yes/no responses;

- observation, such as descriptions of group processes, treatment of staff, clients and volunteers;
- document review, such as reports, policies and planning documents.

A sample format and procedure for conducting an “Organizational Self-Assessment” is included in Tool #8.

It is beneficial to ask both those within the organization (board, staff, members, volunteers) and others who are affiliated (such as organizational partners, members of a network to which your organization belongs, associations that are involved in related work) to assess the organization. There are a couple of reasons why an external assessment is important:

- If your group is relatively homogeneous then there may be a lack of diverse perspectives, knowledge or experience in order to adequately evaluate your current level of inclusiveness;
- Exposure to a variety of outside perspectives regarding diversity, equity and inclusive organizational change helps to ensure the success of your initiative.

C. Planning for Change

Step 11: Develop A Plan

Now that you have determined where your organization is situated in terms of diversity and inclusion, you can begin the process of establishing where you want to go. For this phase you may want to recruit some additional members who have experience and knowledge of planning an organizational change process. Bringing in an experienced facilitator could also be helpful.

Following a review of the key findings from your research and assessment phase, consider the following questions:

- What are we doing well?
- What areas require improvement?
- What would our vision of success look and feel like?
- What are the barriers to achieving this vision?
- How can we initially reduce and eventually remove these barriers?

These questions should be answered as a group and involve input from all areas of your organization. It may be best to hold a brainstorming session and record your results on a flip chart to be referred to at a later date. Once you have the answers to these questions, it will become easier to set goals for creating organizational change, and to

develop a concrete action plan for achieving these goals.

When putting together your plan, be sure to consider any previous attempts to create organizational change. What has worked in the past and what hasn't? Why? This will help to identify potential obstacles, avoid duplicating past efforts and learn from previous successful and failed attempts.

Once your plan is complete, it may be beneficial to obtain objective feedback from people outside of your organization. This can be extremely useful in terms of identifying any gaps or areas that you may have missed.

Finally, ensure that your plan takes into account the assets and opportunities available to your organization, as well as its limitations — in other words, its *capacity*. If your plan requires an unrealistic level of resources it will be difficult to achieve its objectives; on the other hand, you may be amazed by the extent of the resources that can be easily gathered to assist with your initiative.

Your project plan should include the following components:

- issue statement
- desired or anticipated outcomes
- outputs
- detailed activities and resources.

Issue statement: Briefly state the issue that you are trying to address; for example, “To raise aware-

ness of the diversity of the population we serve”, or “to ensure that the organization is welcoming and inclusive and is perceived to be so by members, staff, volunteers and clients”. Try to keep this statement as clear and simple as possible.

Desired or anticipated outcomes: Outcomes are specific changes in attitudes, behaviours, skills, or knowledge that you expect to see as a result of your diversity and inclusion initiative. For example, the desired outcomes of the diversity and inclusion workshop may be “increased knowledge among board, staff and volunteers of issues relating to diversity and inclusion and an understanding of benefits of addressing them within our organization”.

Recognize that that you cannot fully shape or anticipate what the outcomes of your efforts will be, as a myriad of factors are involved in organizational change processes. Some of the outcomes will be unexpected and/or may happen organically. Try not to limit those events that have the potential to take on a life of their own as long as they provide benefits and are still within the mandate of your organization.¹⁵

Outputs: The outputs are the direct, measurable results of your diversity & inclusion initiative. These may include the development or enhancement of the following:

- training workshops for board, staff, volunteers and members;
- vision and mission statements;

- personnel policies and procedures, including a code of conduct, employee recruitment, selection, training and supervision practices;
- volunteer recruitment and management policies and procedures;
- board composition, recruitment and selection policies;
- membership recruitment policies;
- outreach strategies and approaches;
- partnership development process;
- resource development, i.e., from whom funds are requested, methods of fundraising;
- external communications practices: how the organization is perceived by those outside the organization;
- internal communications practices - how those involved in the organization perceive it;
- meeting procedures and conduct;
- methods of obtaining client input and feedback such as e.g., community or client satisfaction surveys;
- evaluation procedures.

For each area in which change is desirable, identify specific and measurable outputs. For example,

“within six months, a one-day workshop will be conducted by an experienced facilitator on issues relating to diversity and inclusion, and will be attended by 80% of our board, staff and volunteers”.

Activities and Resources: Next, develop a more detailed action plan to identify *how* you will achieve your desired outcomes. Answer the following questions:

- What tasks need to be completed?
- Who will do them?
- When will they be done?
- If funds are required, where will they be obtained?
- How will we know when the task is completed?

Step 12: Create a Communications Strategy

Effective communication is essential to build support for your initiative. As part of your Action Plan, consider developing a specific strategy that will encourage two-way communication about the initiative. Board, staff and volunteers will need to know how organizational changes will affect and benefit them and the organization as a whole. It is important that attention is paid to how concerns and

¹⁵ “Organizational Change Involving Equity and Diversity: Issues Raised in Key Informant Interviews and Researcher Observations”. Zainab Amadahy. Community Arts Ontario website. <http://www.artsonline.ca/2ndPages/Mapping/orgChange.shtml> May 2004

suggestions can be brought to the attention of the committee, and how responses and follow-up will be provided. Also make it clear that the responsibility to ensure the success of your initiative lies not only with the designated committee, but also with everyone involved with the organization.

Your communications strategy might include the following components:

- a series of key messages targeted to different audiences: board, staff, volunteers, members, partners, donors, funders, community leaders and the community at large;
- invitations for a variety of opportunities to participate that are appropriate for these different audiences;
- choosing appropriate communication channels and vehicles such as a website, newsletter, workshop presentations, individual contacts;
- timely progress reports;
- consultation on planned changes to organizational policies or procedures;
- regular presentations and progress reports at board, staff and members meetings.



D. Making It Happen

Step 13: Implement the Plan

The implementation stage will reveal whether a strong commitment to organizational change exists or not. With competing demands on our time, energy and financial resources, it is not unusual for initiatives such as this to become bogged down due to tasks not being completed on time, meetings being postponed and other delays. It will take a concerted effort by all committee members, leadership from board members and management, and strong support by staff and volunteers to achieve your desired outcomes. A template of what the different organizational roles and responsibilities might be is outlined in Tool #9: “Roles and Responsibilities of Stakeholders”.

The committee may consider breaking into smaller task groups to tackle particular components of the Action Plan and recruiting additional individuals to assist with the work. However, to ensure effective coordination of the initiative, the Steering Committee must continue to meet on a regular basis, with representatives of all the task groups providing updates at each meeting.

Education and training: One of the components of your organizational change strategy will likely be some form of education and training in diversity and inclusion for staff, board and volunteers. While education and training alone cannot resolve all your organization’s diversity-related issues or challenges,

they can play a vital role in the success or failure of your overall initiative. An education program for all involved in the organization should be provided early in the process. Rushing into the implementation phase without a shared understanding of the needs and benefits of the proposed changes will reduce the likelihood of success.

Ideally, the education and training will be broken down into two discrete phases. The first phase will focus on increasing awareness and understanding about diversity, and in the second phase participants will develop concrete skills and tools that can be used throughout the organization. Such training does not need to be formal, expensive, complex or complicated. Some potential training materials and organizations that provide training are listed in the Additional Resources section, or can be obtained from the Ontario Healthy Communities Coalition.

When designing an education and training program, don't just try to alter attitudes; also focus on altering behaviours. Training topics around shifting behaviours may include developing cross-cultural communication skills and how management can better handle difficult situations. The value of diversity education and training can be optimized when awareness education and skills training are implemented hand-in-hand.¹⁶

Given that additional education or training will likely be required, the following are some key guidelines to keep in mind when developing diversity training for your organization:

- Determine the desired outcomes for the education and training activities;
- Refer to your needs analysis/organizational assessment and desired outcomes - design the program or course accordingly;
- Ensure that participants are aware of the organization's commitment to the initiative and why the training is being conducted;
- Use a participatory process to plan and deliver training.¹⁷

Depending upon the size of your organization and the resources available, consider the following education and training options that may be used separately or in tandem:

- Design and present the education workshops yourself;
- Hire an independent diversity consultant to provide training to staff and management;
- Use a train-the-trainer approach to develop and implement a diversity training initiative by selecting certain organizational members to become trained in applying

¹⁶“What Is the Value of Diversity Training?” SHRM Online (Society for Human Resource Management). <http://www.shrm.org/diversity>. February 2003.

¹⁷ Adapted from: Lawrence Baytos, author of *Designing and Implementing Successful Diversity Initiatives* (Prentice-Hall & SHRM: 1995), and Ann Perkins Delatte, director of education for Diversity Consultants, Inc. in Atlanta, GA- SHRM Online (Society for Human Resource Management) <http://www.shrm.org/diversity> February 2003

equity and inclusion skills. These members, once trained, would be able to deliver the training to others;

- Integrate diversity training into existing training components, if you have them.

Select trainers that reflect your organizational culture to increase the chances that they will be listened to and understood. Build in tools for measuring progress, and revisit your initial goals to continually improve your training efforts.¹⁸

Most importantly, have realistic expectations for the results of your education and training. There are limits in terms of what can effectively be accomplished. Training alone cannot change an organization; it cannot change individuals, change systems or remove organizational barriers. However, what training can do is help create and raise awareness, impart knowledge and transfer skills.¹⁹

Policy and procedures review: All written policies and procedures of the organization should be examined through an equity and diversity “lens” to assess whether any of them may result in the exclusion of certain groups or individuals. Recommendations for changes to any of these documents should be brought to the Steering Committee for discussion and approval, and then brought to the attention of

others as needed for implementation. For example, a change to the mission statement may require approval by the board and then ratification by the members at the next Annual General Meeting, whereas a change to a hiring practice may be handled solely by the Executive Director.

Other tasks: Whatever other tasks are identified by the committee, success will depend on factors such as:

- support given by board and management;
- realistic time frames;
- adequate resources;
- co-operation of other staff and volunteers;
- regular monitoring of progress;
- encouragement and recognition;
- flexibility to revise the plan as needed.

Ensure that you monitor your plan throughout its implementation process to make any necessary adjustments. Try things out. If they don’t work don’t get discouraged; they may just require some fine-tuning. Ask for help if/when the process gets stuck, and continue to share experiences with other organizations also going through the change process. It is important to do your best to maintain the momentum in implementing your Plan so that enthusiasm and commitment are not lost.

¹⁸“What Is the Value of Diversity Training?” SHRM Online (Society for Human Resource Management). <http://www.shrm.org/diversity> February 2003.

¹⁹ Ibid

Step 14: Continue to Deal with Opposition

As previously mentioned, it is common to encounter resistance when introducing any form of change to an organization. This is especially true with respect to creating change that results in a more equitable and inclusive organization. By its very nature, this type of organizational change calls into question current power structures and relations that may have a negative impact on community-wide access and participation. Required changes to your organization may include the redistribution of leadership and decision-making, the sharing of limited resources, and the need to reorganize physical space.

As tensions are inherent to implementing these sorts of changes, conflict will likely arise. An organization that acknowledges and is prepared for conflict will be better able to respond to it. When well managed, conflict can actually be healthy and productive.

By accepting that tensions will develop within your organization, you can use them as opportunities for minimizing fear, to create learning and develop better understanding.²⁰ For more on this issue, refer to Tool #2: “Responding to Opposition”.

Ongoing, appropriate consultation and communication will help to minimize resistance to change.

Be sure to explain in detail what the roles and responsibilities are and will continue to be for each

person within the organization. For example, if a training program is planned, provide clear communication about who should participate and why.

Ensure that the people whom you expect to participate are aware of this expectation and agree. Also, determine how best to tailor your training program to meet the needs and interests of the participants in terms of timing, content, location and other needs.

E. Evaluation

An effective evaluation strategy will allow you to determine whether the initiative was successful, and to identify what worked well and what didn't.

Ongoing monitoring of your progress in implementing the plan should be augmented by a periodic, comprehensive evaluation of the overall initiative.

This is also the time to consider any recent or unexpected changes within the organization (e.g., changes in priorities or in resources available) and the external environment (e.g., changes to community demographics, new legislation or programs relating to inclusion and other emerging trends). These factors may lead to a revision of the plan in order to keep it realistic and responsive to current needs and issues. Recognize that there is no state of *perfection* that an organization will reach in terms of its diversity and inclusion efforts, but it can certainly become more competent in these areas.

²⁰“Organizational Change Involving Equity and Diversity: Issues Raised in Key Informant Interviews and Researcher Observations”. Zainab Amadahy. Community Arts Ontario website. <http://www.artsonline.ca/2ndPages/Mapping/orgChange.shtml> May 2004

Step 15: Track Your Progress

Indicators of progress and success will be needed to guide this aspect of the initiative, and they must be measurable in order to be monitored and evaluated. It is a good idea to set the indicators ahead of time so you know what information you need to collect and can monitor progress on an ongoing basis. Determine what your indicators of progress would be. For example, if you run a recreational program that currently has one position for a youth participant, and you want to increase the number of youth positions that you are able to offer to five, an indicator of progress would be that your organization is able to offer three positions after one year of the two-year project.

It is important to make measurements such as this along the way so as to ensure that your initiative is on track. Hold yourselves (board, staff, and volunteers) accountable for things that have and have not been accomplished. If you are unsuccessful at first, it may just mean that you need to re-evaluate, make some changes and try again.

Step 16: Evaluate the Outcomes

Evaluating the results of your organization's change efforts is not only critical to the credibility of your initiative, but is also essential for identifying growth and for planning future initiatives. Some of the

questions that you may want to answer include the following:²¹

- How are we doing? What have we achieved to date?
- What worked, what didn't work, and why?
- What needs to be adjusted?
- Where do we go from here?

You may want to use both qualitative and quantitative methods to assess the results of your initiative. *Qualitative* assessments are used to provide in-depth information about individual experiences or perspectives, e.g., interviews or focus groups to assess subjective views and opinions of members. A *quantitative* assessment focuses on things that can be counted or directly measured, e.g., collecting service utilization statistics or structured questionnaire responses. Like you did for your Organizational Self-Assessment, incorporate these methods into your existing organizational framework for measuring performance (i.e., how you evaluate and assess your success on an ongoing basis).

Measurement is best done by a comparative process that includes using both baseline data, which details the starting conditions of your organization, and clearly defined outcomes against which change can be measured. Therefore, the first step in measurement is collecting the baseline data or gathering information about the conditions you started with.

²¹ Adapted from: "Inclusivity Organizational Change Overview". Coalition for an Inclusive Community. United Way of London & Middlesex. 2001

This would come from your initial Organizational Assessment process (See Step 10 on page 31).

Once changes have been implemented, measure your progress by comparing your new findings to your baseline data. Try to use the same process in this phase that you did in the initial assessment. For example, if you want to measure the effect of your diversity awareness training, you can ask participants to complete a questionnaire before and after the training to determine whether or not changes occurred in their knowledge, behaviours or actions.

It is important to build a diversity “lens” into regular review and evaluation processes throughout all aspects of the organization and over the long term, (i.e., past the lifetime of this particular initiative.)

Step 17: Reflect on the Process

After you have engaged in inclusive organizational change, you will need to sit back and reflect on the process. Also ask others for feedback. Replace, modify or eliminate those components of your initiative that were not valuable. Strong organizations are constantly evolving, so expect your diversity effort to raise new issues and require adjustments. For further assistance, see Tool #10 “Evaluating Your Success”.

Conclusion

Now that you have read through the steps included here and have a framework for engaging in inclusive organizational change, you may want to examine

each of the Tools in the following section to help decide which actions and approaches may be most appropriate to your organization. Feel free to adapt or change them to suit your particular needs.

Keep in mind that there is no single or right way to go about things, and what may work for one organization may not work for another. Also remember that becoming more diverse, equitable and inclusive in an ongoing process and that it takes time to build mutual understanding, gain skills and knowledge and develop trust and meaningful relationships within and around an organization. Change is never easy, but it can be immensely rewarding.

