



BE YOURSELF
SEE YOURSELF

FINAL EVALUATION REPORT

February 28, 2023

Prepared by



EXECUTIVE SUMMARY

- Key Successes and Impacts
- Key Learnings
- Recommendations

EXECUTIVE SUMMARY

The Be Yourself, See Yourself (BYSY) project launched in October 2021 and closed December 2022. This was the second phase of the data equity pilot and an expansion from the first phase that ended in early 2021. The BYSY project recruited 53 agencies, nine of which audited the project, to pilot social identity data collection across the social services sector. A developmental evaluation was commissioned to identify key learnings coming out of the implementation of the project.

The project had several key successes and impacts, including:

- An approach of partnership building and iterative learning that gave all stakeholders – Advisory Committee, agencies, and consultants – a supportive environment to test social identity data collection.
- An Advisory Committee that provided a forum for stakeholders to connect, share perspectives, and learn from each other.
- Training, tools, and resources that gave agencies the foundation to begin collecting social identity data and continue to grow in this work.
- An opportunity for agencies to assess their data collection processes and infrastructure with respect to social identity data and identify areas for improvement.
- Enable agencies to use the social identity data to dispel myths and assumptions about who is being served and identify gaps in service delivery.

The evaluation found several key learnings, including:

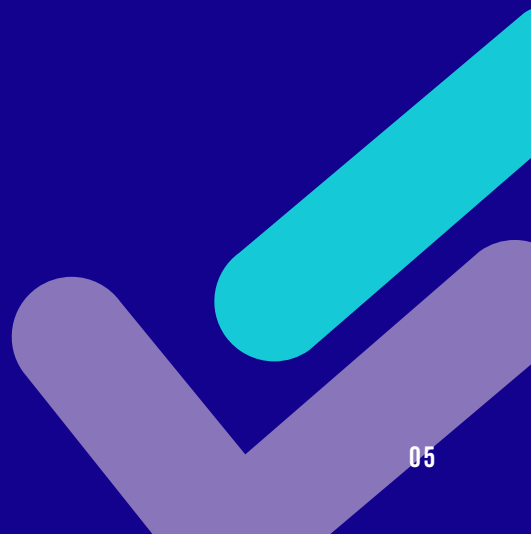
- A significant challenge for agencies was limited staff capacity to implement the project. The evaluation found that having a dedicated staff person to plan, collect and analyze social identity data is more likely to result in successful completion of the project.
- Agencies struggled with analyzing their social identity data as they did not have the staff expertise to collate and analyze the data.
- Due to historical and continued racism and discrimination, Black communities were hesitant to provide social identity data. Agencies that primarily serve Black communities required more time and resources to build trust in their communities.
- Staff felt they needed training on a few key areas, including: 1) using a trauma-informed approach when collecting social identity data from clients, 2) privacy laws and how it applies to their data collection, and 3) cyber security provisions.

Based on the key learnings from the evaluation, it is strongly recommended that another phase of the data equity pilot is implemented to continue to build on phases 1 and 2.

Several recommendations coming out of this phase have been suggested for the next iteration of the project, including:

- It is essential that agencies have the staff capacity and expertise to plan, collect and analyze social identity data.
- The social identity tool needs to be revised to include multiple answer choices, updated terminology, definitions, and more comprehensive racial categories. The We All Count final report provides a more extensive list of changes.
- As part of organizational readiness, the project should work with agencies to build a data plan/strategy to provide a clear path on what to do with the data after it's been collected and analyzed. As well, the project should work with agencies to review data infrastructure and to provide guidance on data privacy and cyber security requirements.
- The project should provide training/resources/tools to agencies that work with Black and Indigenous communities to help build trust prior to collecting social identity data. This also applies to other marginalized communities where trust is important.
- Agencies need an ongoing community of practice to connect, share, and learn from each other.
- Prior to implementing the next phase of the project, a co-creative design session should be held to address the challenges from the first two phases of the data equity pilot.

INTRODUCTION



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In October 2021, the City of Toronto, United Way of Greater Toronto (UWGT) and Ontario Trillium Foundation (OTF) collaborated to fund the Be Yourself, See Yourself (BYSY) project and awarded the coordination of the project to Findhelp 211. The BYSY project came out of phase one of the data equity project that launched in 2020 and ended in early 2021. Phase one was done on a smaller scale with fewer agencies and at a time when the Coronavirus pandemic was at its height. The purpose of the BYSY project (phase two) was to continue to expand on phase one and test social identity data collection with more service users to better understand how to best support agencies in a) collection of socio-demographic data, b) how to use the data to advance better outcomes for equity-deserving communities, and c) to socialize the collection methodology and use of tools across the community social services sector.

We All Count was contracted to build the capacity of agencies in the not-for-profit sector in Toronto to collect and use social identity data using the City of Toronto social identity survey tool. The City of Toronto survey tool was adapted from Home and Community Care Supports Services (formerly LHIN) and used in the health sector for some time. We All Count delivered capacity building sessions and coaching supports to agencies using a staged approach – three cohorts of agencies were recruited at three consecutive time periods in 2022. Each cohort went through the same capacity building sessions and were offered coaching support and resources throughout their engagement period. More detailed information around the capacity building series can be found in the We All Count final report.

In addition to coordinating the project Findhelp supported the initiative through hosting and managing a public website to promote the BYSY initiative across the sector. On the website there is also a member only page that allows participating agencies to act as a placeholder on the website to complement the capacity building work. As such, Findhelp set up an online discussion forum on the BYSY website to serve as a community of practice for agencies. The forum was intended to be an online space for agencies to interact with each other and the consulting teams.

D&D Inclusion Consulting was contracted to conduct a developmental evaluation of the BYSY project, and to collect and analyze the social identity data agencies collected. The BYSY project came to close in December 2022. This report is the final evaluation of this project.

EVALUATION METHODOLOGY

EVALUATION METHODOLOGY

A developmental evaluation approach was commissioned to identify key learnings from the BYSY project. This type of evaluation is best suited for pilot projects as it uses an iterative process. Through real time data collection, the evaluation remains fluid to the realities of project implementation. It is also typically used with agencies, including social service organizations, that work in highly complex environments that provide multiple services to a highly diverse population with intersecting needs.

In February 2022, an evaluation plan was developed to describe the methodology and approach. The evaluation plan included key questions to learn about agencies' experience with the project, including, but not limited to:

- Interest and intent in the collection and use of social identity data.
- Challenges and barriers to collecting social identity data.
- Supports needed to address the challenges.
- Successes in collecting social identity data.
- Sector-wide considerations for future iterations of the project.

The evaluation work plan initial approach was to use the discussion forum to garner real time feedback from agencies, and towards the end of the project to conduct three virtual communities of practice (a community of practice for each cohort). However, as the project progressed, the evaluation approach quickly changed to respond to the operational realities of the project. For example, as the project got underway, there was very little engagement from agencies on the discussion forum (this is further discussed in the evaluation findings of the report); therefore, a quick pivot for the evaluation was required. The decision was made to conduct 30-minute interviews with the first two cohorts of agencies to garner real time feedback on challenges, successes, and supports needed. Interviews with cohort 1 agencies took place from June to July 2022. An interim evaluation report was developed and shared with the Advisory Committee in September 2022. Interviews with cohort 2 agencies were conducted from August to September 2022. Cohort 3 agencies were not interviewed as they had just started their capacity building sessions in September 2022 and needed time to implement the project; they were able to provide feedback as part of the larger in-person Final Evaluation Event held on December 9, 2022.

In the evaluation interviews, agencies noted that they wanted some form of in-person community of practice to share learnings, including challenges and successes. This feedback was presented to Findhelp, and the decision was made to hold an in-person Final Evaluation Event to replace the proposed virtual community of practices. A full-day Final Evaluation Event was held on December 9, 2022, for agencies and funders to share findings and learnings. The first half of the day was a panel session with funders and agencies to provide their reflections on why social identity data collection is important, key learnings, challenges, successes, and vision for the future. The second half of the day was reserved for agencies to provide feedback on organizational readiness, challenges and success with data collection, analysis, upload, and considerations going forward.

Incorporated into the evaluation is the data analysis from the BYSY Data Collection Survey. The survey was hosted on D&D Inclusion Consulting's SurveyMonkey platform to protect the privacy of agencies and their data. The survey was open from November 2, 2022, to December 16, 2022. The purpose of the survey was to:

1. gather insight on agencies participating in the project, especially with respect to size, sector of operation, and capacity, and
2. to provide agencies the option to upload their data collected through the project and receive a custom snapshot. Agencies that agreed to upload their data were asked to sign a Data Sharing Agreement.

The Advisory Committee met on February 21, 2023, to provide their reflections on the BYSY project. In preparation for the meeting, members had an opportunity to review the final draft evaluation report. Members shared key learnings as a partnership, strengths, and considerations for the future

EVALUATION FINDINGS

- Snapshot of Agencies
- The Why
- Organizational Readiness
- Social Identity Survey Tool
- Data Collection
- Data Analysis and Sharing
- Success and Impacts
- Systems Level Considerations

EVALUATION FINDINGS

In total, 53 agencies were registered for the BYSY project, of which 8 audited the project. The evaluation findings are based on the 45 agencies that participated in the project and does not include auditing agencies. The evaluation includes findings from:

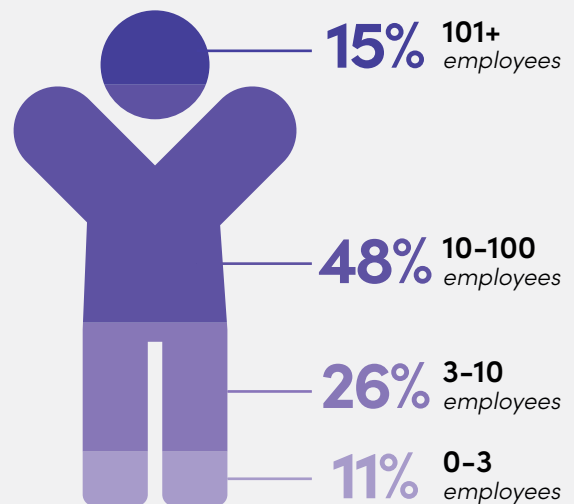
- Interim evaluation interviews conducted with 20 agencies from cohorts 1 and 2: 10 out of 11 agencies from cohort 1, and 10 out of 13 agencies from cohort 2.
- The Final Evaluation Event held with 19 agencies and the three funders: City of Toronto, United Way, and Ontario Trillium Foundation.
- The BYSY Data Collection Survey completed by 27 agencies; 10 of which uploaded their data; and,
- Advisory Committee feedback.

The key findings are categorized into key thematic areas that emerged from the evaluation.

SNAPSHOT OF AGENCIES

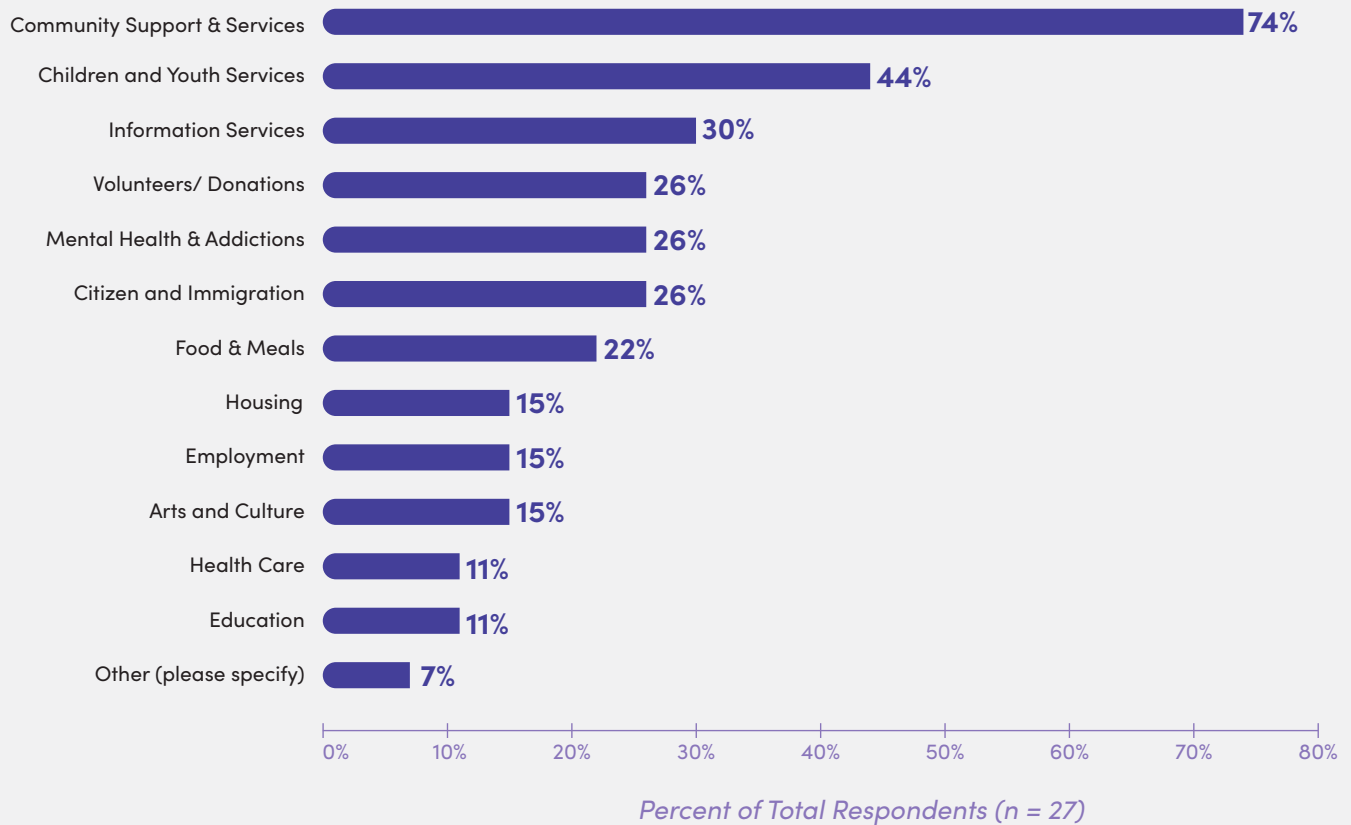
The following information provides a snapshot of the participating agencies. There were 27 agencies that completed the BYSY Data Collection Survey - a very good response rate of 60%. While it does not capture all of the agencies, it provides a picture of the type of agencies that participated in the project. The BYSY Data Collection Survey asked agencies questions about their size (staff count) and sector(s) of operation. The data shows that nearly half of the agencies had a staff count of 11-100 staff. While the agencies operated in a wide variety of sectors, they were predominately in the social services and children and youth sector. The We All Count final report also provides additional information on participating agencies.

How many full-time employees are currently employed at your agency?



Which sectors does your agency operate in?

Sectors



THE WHY

Agencies joined the project because they understood the value of collecting social identity data and saw the BYSY project as an opportunity to begin doing this work. They all felt that collecting social identity data could help inform their programs and services to meet community needs, and that the data could provide them with a deeper understanding of who their clients are, if their programs/services are responsive to client and community needs, if the most in need are getting served, and how to improve the quality of their programs and services. A few noted they wanted to satisfy funder requirements.

When funders were asked why they collaborated on this project, similar reasons to the agencies were provided. Funders want a better understanding of the communities being served, which ones aren't, and opportunities for program improvements. One of the funder's pointed out that data provides an objective understanding of who is being served rather than a perceptive observation.

ORGANIZATIONAL READINESS

The evaluation posed several questions around organizational readiness to get an understanding of agency and funder preparedness for the project, any lessons learned that can be carried forward, and when looking back, what supports should have been in place to set up agencies for success.

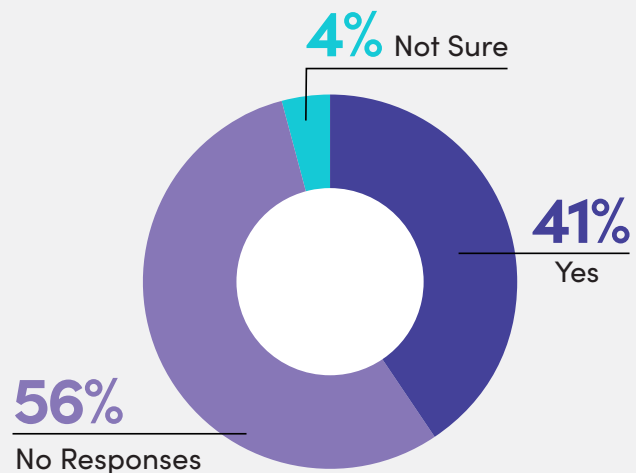
Key Learning - Staff Capacity

The evaluation found that one of the most significant challenges in the project was staffing capacity of agencies to administer the BYSY project. Many of the agencies tasked front-line staff to implement the project; however, staff were struggling to keep up with their main duties and were implementing the project “off the side of their desks”. Staff reported they were busy ramping up programs that had been shut down due to COVID, were implementing programs that had just received funding, or were the only staff person tasked to collect the data. Some agencies had to pool staff time to administer the project. Due to capacity issues, some of the staff did not have time to attend the We All Count capacity building and coaching sessions. One of the agencies noted that they did not know how to ask for additional staff resources, and another mentioned that, had they known the intensity of the project, they would not have signed up.

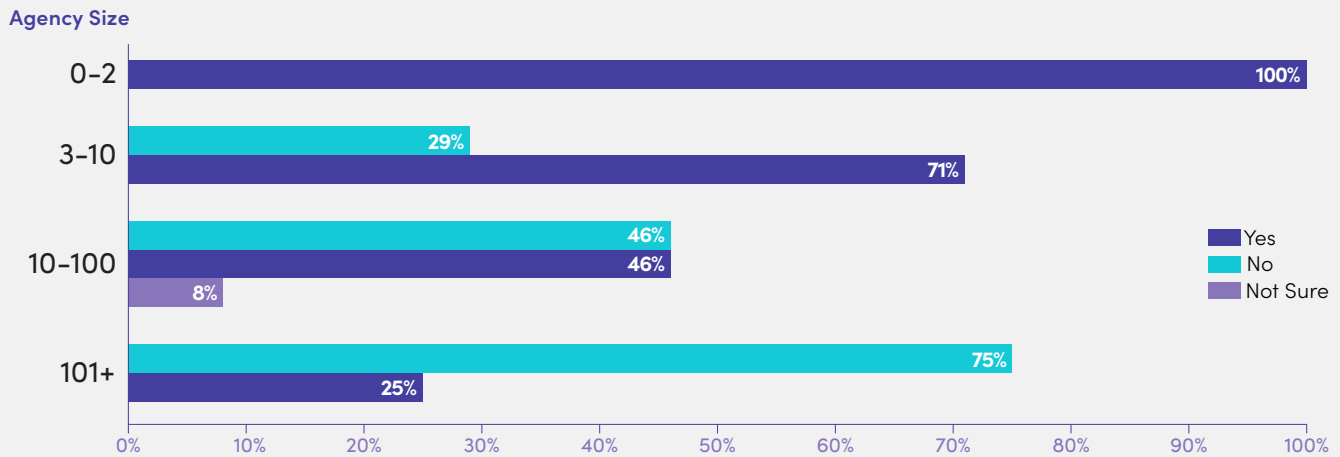
The BYSY Data Collection Survey asked agencies about staff capacity. Over half of the agencies said they do not have a paid individual to collect the data and conduct analysis.

This data was further analyzed by the size of the agency. The analysis shows that the larger the organization, the more likely they are to have dedicated staff to collect and analyze the data.

Does your agency have a paid individual whose job it is to collect and conduct data analysis?



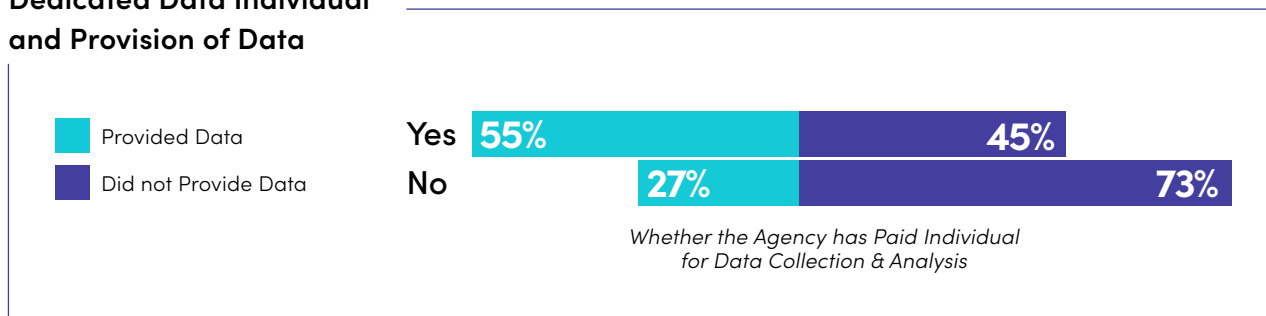
Agency Size and Dedicated Data Collection and Analysis Staff



Smaller agencies were limited with staffing resources and had to find alternative ways to implement the project; for example, hiring students or external evaluators. One agency asked an external evaluator to use a train-the-trainer approach to build staff capacity. However, these solutions also came with challenges. Students came and went and did not stay for the entirety of the project. For one of the agencies, the independent evaluator did not understand the client base and was not able to analyze the data from an equity lens.

A further crosscut of the data was done to investigate if agencies that have a dedicated individual to collect and analyze data are more likely to upload their data to the BYSY Data Collection Survey. The data shows that agencies that have a dedicated individual were more likely to upload their data.

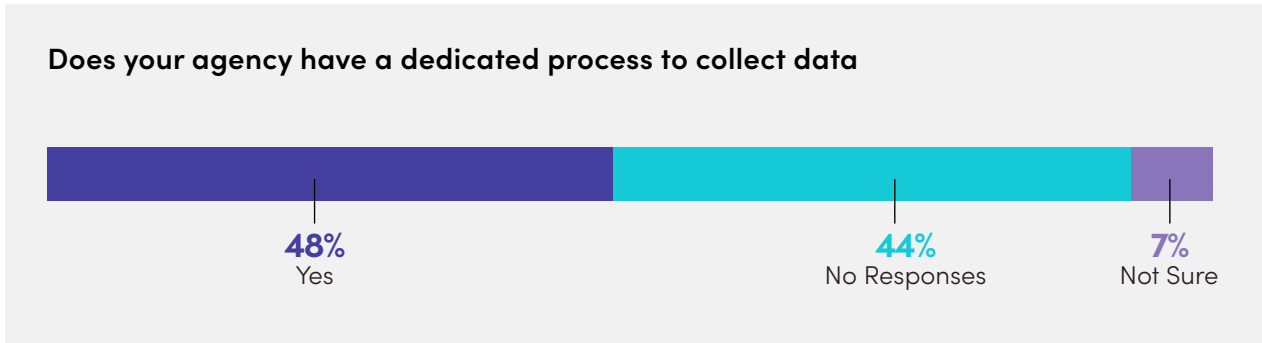
Dedicated Data Individual and Provision of Data



The evaluation findings show that staffing resources need to be allocated to the collection of social identity data, and that having dedicated staff person(s) to plan the data collection process and conduct the analysis is going to result in more likelihood of agencies collecting and using social identity data.

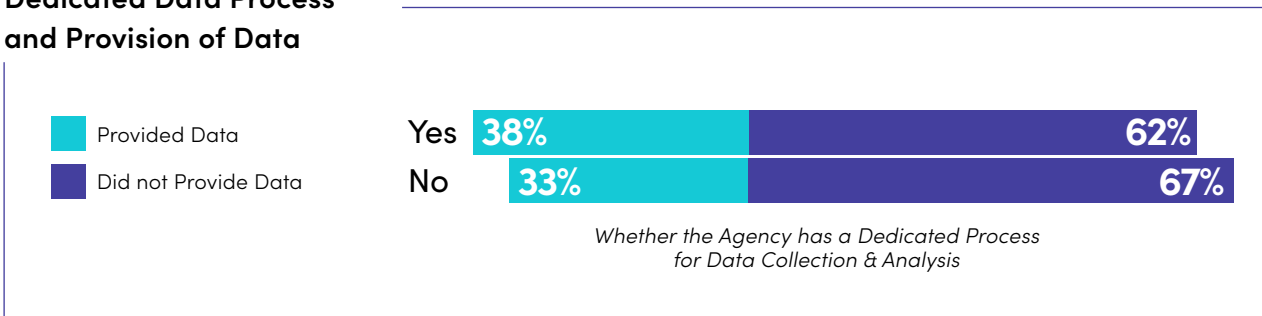
Key Learning - Data Technology and Process

A key area of organizational readiness is having the technological infrastructure in place to collect, store, and analyze the data. The BYSY Data Collection Survey asked agencies if they have a dedicated process to collect data. There was almost an even split of agencies that had a dedicated process versus those that did not.



A further crosscut of the data was done to see if having a dedicated process led to more likelihood of uploading the data.

Dedicated Data Process and Provision of Data



The cross analysis shows that agencies that have a dedicated data process did not necessarily lead to more likelihood of providing data. The data seems to suggest that what matters more is if there is a dedicated individual to collect and analyze data.

The BYSY project did, however, lead to agencies reviewing their internal data collection systems. One agency realized their data collection system needed an update and for funding to upgrade their systems. A few agencies did not go further with the project because they realized that they had the technological infrastructure in place and were already collecting this data.

Key Learning - Building Relationships with Communities

Agencies that serve Black communities found that clients were hesitant to provide social identity information. As a result, these agencies decided to take time building relationships with the communities they serve before administering the survey. Black and Indigenous communities have endured racism and inequities with government systems which has resulted in a mistrust around data collection. For example, Black communities have had to experience carding and racial profiling. There is a fear around how the data will be used and if it will re-stigmatize their communities. Agencies that serve undocumented workers and newcomers expressed similar concerns.

Looking back, agencies would have liked to have resources to help them build relationships with their communities in order to implement the project. While it is important that organizations are ready to collect data, the communities they serve also need to be ready. For the next iteration of the project, it is advised that training and resources on how to build relationships with Black and Indigenous communities are provided to agencies. As well, project consultants should have a strong understanding of First Nations Principles of OCAP (ownership, control, access, and possession) – these are principles that stipulate how First Nations data and information will be collected, protected, used or shared.

Key Learning - Staff Training

The training from We All Count on the social identity tool was very helpful to agencies (more is provided in the “Success and Impacts” section of the report). The evaluation findings show there are a few key areas where the training could be tailored and/or enhanced based on agency feedback.

- **Customized in-house training on the tool**

Some agencies found that staff were not familiar with the terminology used in the tool and as a result were hesitant to ask clients to provide their social identity data. This brought up a broader question on how to best socialize staff on the tool. One of the funders noted that they held staff training sessions to better understand staff concerns/hesitations with social identity data collection and produced tailored resources to address specific concerns. As part of the BYSY project, We All Count offered coaching sessions to agencies to address and solve challenges, including how to introduce the questions to clients. An introductory section was added to the tool and role play exercises were conducted with agencies. However, the findings seem to suggest that an additional step may be needed where agencies provide customized in-house training to staff to address specific concerns.

- **A Trauma-Informed Approach**

Agencies noted that looking back, they would have liked their staff trained on how to use a trauma-informed approach to this work, especially on how to appropriately listen to stories from vulnerable and marginalized communities, translate those stories to funders, and to be able to respond to clients if they experience trauma in telling those stories. Using a trauma-informed approach to this work will also help agencies to build relationships with marginalized communities, especially Black and Indigenous communities. For the next iteration of the project, it is recommended that a trauma-informed approach be built into the capacity building and coaching sessions.

- **Privacy Laws and Cyber Security**

Agencies also identified wanting more training on privacy laws and cyber security and how it applies to the collection, storage and use of social identity data. We All Count and D&D Inclusion Consulting provided agencies with information on privacy laws; however, cyber security was not included. The next iteration of the project should focus on more extensive training in this area and at the beginning of the project. Perhaps the training could be provided in consultation with experienced agencies such as the Office of the Privacy Commissioner. The in-depth training may want to cover how privacy laws apply to social identity data collection for non-profits and charities, data security provisions that need to be taken to comply with privacy laws, and how to appropriately store, use and share data so that agencies are in compliance.

- **Provision of Honorariums**

A topic of much discussion among agencies was around honorariums for clients completing the social identity survey. Agencies struggled with the appropriateness of honorariums, if it should be given, how much to provide, and what is a fair exchange for time and labour. Some helpful feedback was shared by funders and agencies in that honorarium costs may want to be identified in funding proposals and to also advocate for it. Another suggestion was to think of opportunities to eliminate barriers to survey uptake, including covering transportation costs, child minding, and providing meals. We All Count did address honorarium in their coaching sessions; however, perhaps the subject could be covered as a resource or in a capacity building session.

Key Learnings – Advisory Committee

The BYSY project had an Advisory Committee to provide guidance on the project. The Committee consisted of the three funders – City of Toronto, United Way, Ontario Trillium Foundation – as well as Findhelp (the project coordinators), agencies and the consultants (We All Count and D&D Inclusion Consulting).

- **Strengths**

Members appreciated the time to connect at the meetings, share perspectives, and to learn from each other. Having agencies and funders come together through the committee was helpful to understanding each other's perspectives on the project. A funder noted that having the agencies' perspective was important as they are at the front lines of social identity collection. One of the agencies noted that they appreciated hearing all three funders' perspectives, as well as learning about promising practices in collecting social identity data. Findhelp found the collective expertise of all members helpful in implementing the project.

- **Stakeholder Engagement**

It was noted that agency engagement was strong at the start of the project but started to taper off towards the end. It was noted that agencies were being asked to implement a difficult project during a time when they were facing a staffing crisis. A few promising practices were suggested to incentivize agency engagement throughout the duration of the project, including providing honorariums as well as related learning opportunities.

When asked “who is missing at the table”, members noted that for the next iteration of the project, the committee may want to have a wider variety of technical experience, including an equity, diversity, and inclusion (EDI) expert, a member with experience in data analytics, and perhaps institutions experienced in social identity data such as colleges and universities.

SOCIAL IDENTITY SURVEY TOOL

Agencies provided feedback on the social identity survey tool through the evaluation, which is summarized below.

- **Inability to select multiple answers.**

Questions regarding language, gender identity, and sexual identity only allow respondents to select one answer. Individuals may hold multiple identities with respect to gender, sexual orientation and speak more than one language. The survey tool is not inclusive of the multiple identities and should allow respondents to select more than one answer.

- **Terminology needs to be updated.**

Terminology is constantly changing in the sector and the survey tool needs to reflect the most up to date language, definitions and terminology. One of the agencies noted that options under gender identity are not up to date. For example, cis-gender man and cis-gender woman is not included.

- **Definitions are required**

Agencies also noted that some of their clients, in particular newcomer clients, may not understand some of the terminology under gender identity and sexual orientation (i.e. Two-Spirit). Agencies also found that within the communities they serve there were various levels of understanding of terminology; for example, for the younger demographic there is more familiarity with terms used for gender identity and sexual orientation, but this may not be the case for an older demographic. Agencies noted it would be helpful to have definitions to the terminology that front-line staff can reference.

- **More comprehensive racial categories**

A few agencies noted that the racial categories need to be more comprehensive and more defined. For example, Spanish speakers from Spain were not sure how to identify themselves using the racial categories in the tool.

The We All Count report provides a more detailed account of specific changes to the tool (agency feedback was provided through the capacity building and coaching sessions). Suggested changes to the tool were brought forward to the City of Toronto early in the project through the Advisory Committee. However, at the time the tool was not amended as it was also being used as part of a larger data equity initiative across City departments. The City noted that they would take the recommendations from the pilot forward to an advisory committee they were setting up with EDI experts and, through wider consultations, make the necessary revisions. For the project, agencies were instructed to amend the survey tool as they saw fit, which they did.

As part of the BYSY Data Collection Survey, agencies were asked to submit their data. In return for their submission, the D&D Inclusion Consulting agreed to analyze the data and provide a snapshot. In that analysis, the D&D Inclusion Consulting team noticed a discrepancy in the data reported for the question “Do you identify as Indigenous to what is now called Canada” and “What race category best describes you”. Individuals who identified as Indigenous to Canada did not equal to individuals who identified as First Nations under the race category question. Typically, the question on Indigenous identity is asked as a separate question, and not included as part of a race category question. It is advised that when revisiting the questions in the survey tool, the approach to asking about Indigenous identity is amended to ensure accuracy of data.

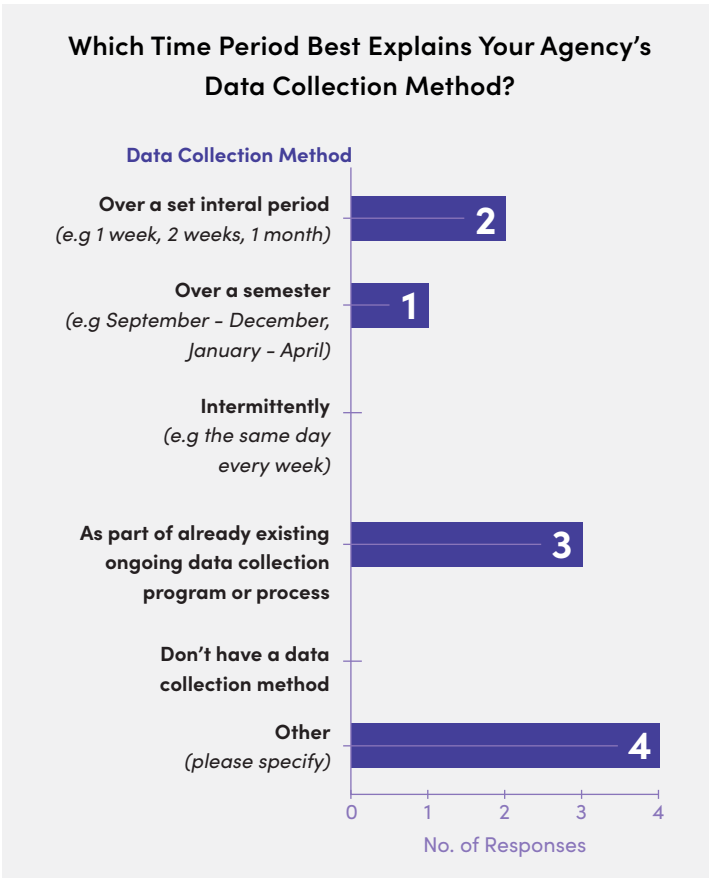
DATA COLLECTION

Agencies were asked to share their key learnings when it came to the data collection using the social identity tool. A few key learnings were identified.

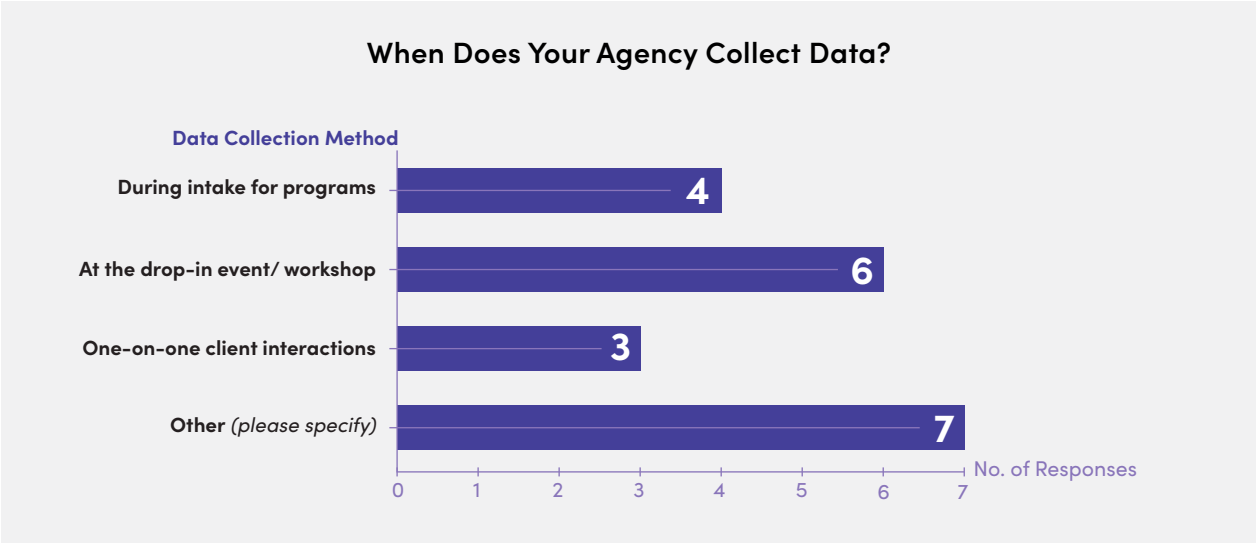
Agencies used a variety of approaches to administer the survey including events, workshops, drop-in programs, during intake, and going door to door. These approaches varied by agency and the needs of their community - an approach that worked for one agency may not have worked for another. For some agencies, in-person data collection worked better than online, whereas, for other agencies online was a better method.

The BYSY data collection survey asked agencies that uploaded their data about their data collection methods. While the information is based on a small sample size of 10, it helps to provide some insight on how agencies collected their data.

When agencies were asked about the time period in which they collected the data, the answers varied: data was collected as part of ongoing data collection processes, interval period (e.g., drop-in sessions and/or events) and over a semester.

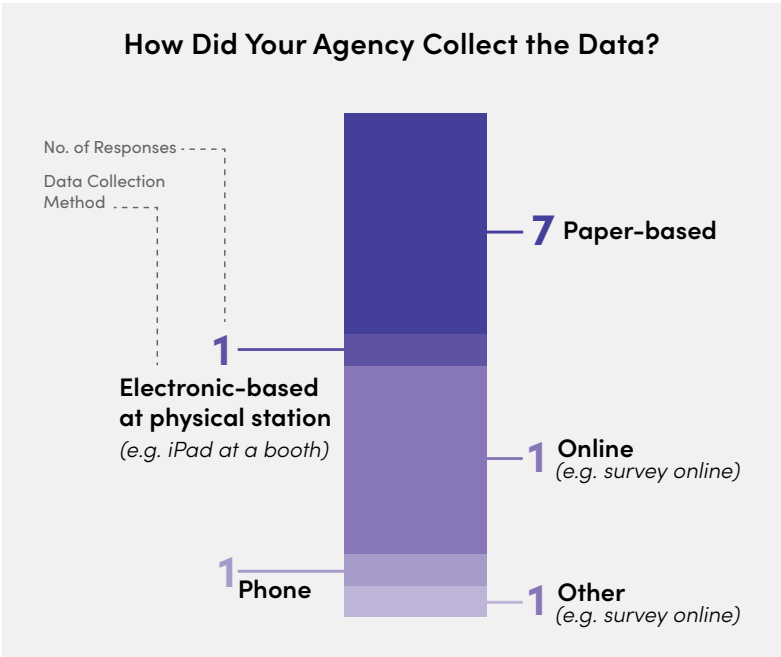


The data below shows agencies collected data from drop-in events/workshops, during intake, one-on-one client interactions. The "other" responses included data is collected at the time the client is engaged (e.g., during a session, or when the client comes into the building), through monthly/quarterly engagement with clients, email, and exit surveys.

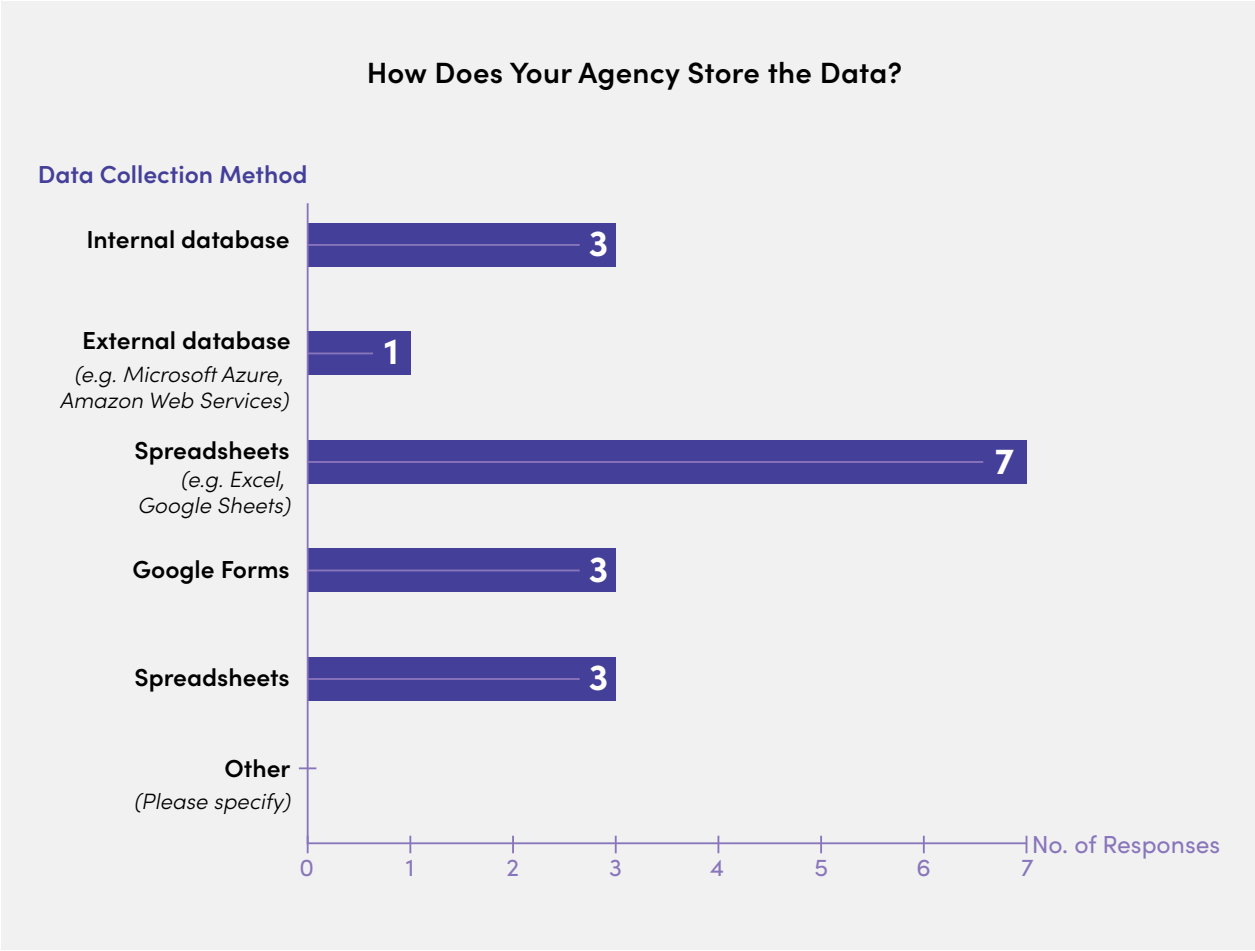


As part of the data collection process, a few agencies noted they weren't sure how to deal with double counting; for example, if an individual's data was collected at one point of contact (e.g. drop in event), how could they ensure that the same person's data was not collected again during an intake for another program? This would seem to suggest that agencies need to find a way to ensure that their data collection process is robust to ensure that there isn't double counting, meaning there aren't multiple entries for one individual.

Agencies were asked through which method they administered the survey. The data shows that agencies used paper-based and online methods to collect data. The "other" response includes door to door (however, this response was probably best suited under "when does your agency collect the data?").



Agencies were also asked about how they stored the data. The responses seem to indicate that agencies were using spreadsheets; however, it is unclear if this is because they did not have robust data infrastructure. Grassroots agencies, in particular, seemed to struggle with data storage - one had to contract out data collection and storage to a third-party vendor, only to realize their clients were not able to upload their social identity data to the system. As a result, the agency brought the data collection system in-house and used google forms. This feedback would seem to suggest that more work needs to be done with agencies to ensure they have the data infrastructure in place to be able to collect and store their data in-house.



DATA ANALYSIS AND SHARING

Agencies noted that a lot of planning went into how the data was going to be collected rather than the data analysis, which ended up becoming an afterthought. This meant that when it came to doing the data analysis, agencies ran into challenges.

Agencies found they struggled with how to categorize and analyze the data due to two key reasons: 1) agencies did not have the staff resources to compile and aggregate the data, and 2) agencies did not have staff with the required skill set to analyze the data. Agencies didn't realize how much time goes into data compilation and aggregation and had difficulty finding staff who had the time and skills to do this work. Agencies that were collecting data from multiple programs found it very hard to aggregate all of the data in a meaningful way. One agency assumed their staff was skilled in data analysis, only to realize this was not the case at the time of analyzing the data. One grassroots agency hired someone to compile the data; however, that person left shortly after.

Agencies found the capacity building and coaching sessions offered by We All Count to be very helpful as it gave them a better understanding of how to approach the data sets. Tools were provided to help with data aggregation and were explained clearly by the consultants. As well, agencies noted that data analysis was discussed as part of the overall capacity building on social identity survey design and data collection. When asked what supports agencies needed, the feedback seems to suggest more technical expertise was required. Agencies noted they needed more advanced technical support in data coding, categorization and analysis. This type of expertise was out of the scope of the BYSY project; however, this is important feedback to consider in the next iteration of the project. It is highly recommended that in the next iteration of the project agencies are asked to identify if they have staff time and expertise to compile, aggregate and analyze data, and if that is not available, to provide the resources for agencies to conduct the data analysis.

For agencies that did analyze their data but did not upload it to the Survey, they noted they were dealing with multiple priorities and deadlines which led to the data upload "falling through the cracks". They just needed more time. The BYSY Data Collection Survey launched on November 2, 2022, and while it was supposed to close by December 9, 2022, it was extended a week to December 16, 2022. However, this time frame was too short for agencies to have time to compile and upload their data. For the next iteration for the project, it is recommended that the data upload platform is offered at the launch of the project and agencies are given additional time (a few extra months) at the end of the project to upload their data. Another option is to offer the data upload platform on a continuous basis rather than specifying a time frame.

A few agencies noted that after analyzing their data, they weren't sure how to move forward with program design, and at what point they should do that. They also mentioned that social identity data collection cannot exist in isolation of program evaluation and would like more guidance on how they can tie both together. In fact, the evaluation found that very few agencies had linked social identity data collection back to their mission/vision statements, strategic plans or equity statements. This feedback seems to suggest that agencies need to have a data strategy in place to understand why the data is being collected and how the data is going to inform program and service design, and that the data plan is linked back to the organization's strategic plan and/or equity plan to give it priority within the organization. As part of reiteration for the next project, consideration should be given to how to help agencies think through a data plan and to link it to the organization's governance documents.

Agencies noted they would have liked to incorporate qualitative data so there is a narrative to the data. They mentioned that they would like to collect stories from their clients to provide a richer way of contextualizing the social identity data they collect. The incorporation of qualitative data was out of scope for the BYSY project but could be taken into consideration for the next iteration of the project.

SUCCESS AND IMPACTS

The evaluation found that the BYSY project led to several key successes and impacts.

- **Partnerships and iterative learning.**

One of the key successes of the BYSY project was the way in which it was set up and the approach that was taken. It brought together three key funders – City of Toronto, United Way, and Ontario Trillium Foundation – who took an approach of iterative learning and evaluation. The Advisory Committee which had the participation of all three funders and agencies provided a forum for learning, knowledge exchange, and opportunity for iteration. Having Findhelp as the project administrator and hiring consultants to implement the project gave agencies the space they needed to experiment, learn and provide feedback.

- **Having data equity conversations.**

The project resulted in agencies looking at their data processes and systems – their survey questions, how they collect data, how it's being stored and used. Some agencies realized where there are gaps in their data infrastructure and processes. One agency realized that their data collection system was not sufficient and were successful in receiving funding to launch a new data system. Agencies also updated their intake forms and surveys with social identity questions and/or adding categories to response options.

- **Agencies are collecting social identity data.**

One of the biggest successes of the project is that participating agencies have learnt how to collect social identity data. Agencies noted that the project gave them the opportunity to start collecting this data and inform their program and service designs. This project was able to train 53 agencies (8 of which audited the project) on how to collect social identity data. Agencies that participated in this project amended intake forms and surveys with social identity questions to learn more about their clients. Some also reviewed their program logic models to identify how they can incorporate social identity data collection to inform program redesign. Out of the 45 agencies, 10 (almost a quarter) collected social identity through the project. This number could be slightly higher as not all agencies that collected data uploaded it to the BYSY Data Collection Survey due to reasons previously noted. Agencies also noted that going forward they plan to continue to collect social identity data.

- **Dispelling myths.**

For agencies that collected data, the data helped to dispel assumptions they had about their client base. One agency found that the racial composition of one of the buildings they service is in fact different from what they assumed, and as a result, have decided to revise

their services to be more inclusive of additional racialized populations. Another agency had made assumptions about who in their catchment areas are attending their programs; after analyzing the social identity data from the program, they realized they have a more diverse population attending their programs than what was assumed.

- **Capacity building and coaching.**

Agencies noted that the capacity building and coaching sessions from We All Count was very helpful. One agency said the capacity building sessions were a great starting place and gave them the push they needed to start the data collection process. Agencies found the resources were accessible and very easy to follow. One agency noted the workbook sparked really great discussions on social identity data collection in their agency. Agencies also appreciated the introductory paragraphs that were added to the survey tool and also the roleplaying exercises. The coaching sessions were especially helpful to agencies as it provided a collaborative space for learning and sharing with each other; agencies appreciated knowing they were not alone in their challenges. One of the agencies noted it was great to see what peers are doing in different sectors and to leverage practices from others. A grassroots agency noted that as a small agency strapped for resources these sessions were invaluable to them. In the coaching sessions, We All Count helped agencies with framing their demographic questions, administering the social identity tool, dealing with honorariums, and how to approach and conduct data analysis. Agencies appreciated that the coaching sessions were held weekly, and that the online forum made it feel easy to drop in and ask questions. They also found the We All Count staff very approachable and appreciated having their questions answered or items reviewed.

- **Leveraging learnings for the future.**

Agencies noted that they plan to keep continuing with social identity data collection and to keep with the iterative learning. Some agencies mentioned they plan to insert social identity data collection into their evaluations, including program logic models, and to also start building it into program planning and design.

SYSTEMS LEVEL CONSIDERATIONS

A few systems level considerations came out of the evaluation, which requires deeper reflection and conversation with funders.

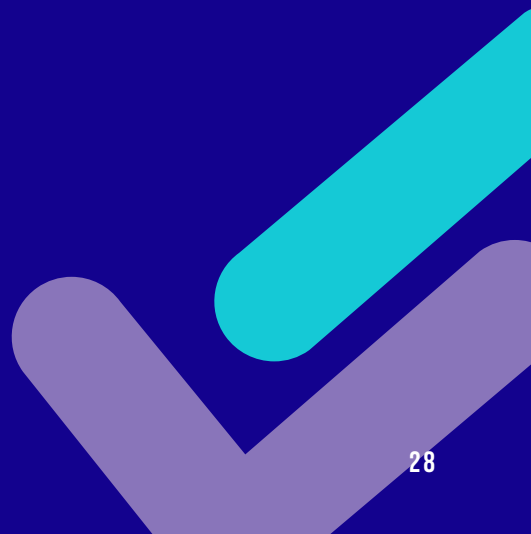
- **Shared Resource Hub.**

A suggestion was made to create a shared resource hub for agencies participating in the data equity pilots to share approaches, resources and methodologies. Agencies found collaborating with each other to be incredibly helpful. However, further investigation is required on how this would function. The BYSY project set up the online discussion forum as an opportunity for agencies to interact and share learnings, however there was very little uptake, and ended up becoming a resource repository managed by the consultants. A more accessible format may help, such as a Google Drive, that is managed by participating agencies.

- **Universal Data Collection.**

Agencies noted that they are collecting data for multiple funders, which can be taxing on resources. They suggested that funders take a more universal approach to agency data requirements and come up with a set of common social identity metrics.

RECOMMENDATIONS



RECOMMENDATIONS

The evaluation shows that agencies need continued support in social identity data collection, and therefore it is highly recommended that another phase of the data equity pilot is considered. Each phase has produced key learnings that are important to reflect on and implement. This phase – the BYSY project – revealed key learnings that can be used to improve the next phase of the data equity pilot. The following are key recommendations for the next iteration of the pilot.

- **Agencies need staff capacity to collect and analyze social identity data.**

One of the most significant challenges agencies encountered was the lack of staff capacity to implement the project. Most often it was front-line staff tasked to conduct the project and were doing so “off the side of their desk.” As a result, many agencies had to delay the project to handle competing priorities. Also, agencies found they did not have staff with the right skill sets to compile and analyze the data. Some were collecting data from multiple programs and ran into challenges in data collation and analysis. The evaluation shows that if agencies are to be successful in collecting social identity data, they need the dedicated staff resource(s) with the right skill set to do this work.

- **Agencies need to create a data plan and embed it in their strategic plan.**

The evaluation shows that while agencies clearly understood why they are collecting social identity data, they did not seem to have a strong data plan to guide them in how they were going to use the data. Agencies noted that once they collected and analyzed the data, they were not exactly sure how to move forward. Agencies need a strong data plan to provide a clear path as to how they can use the data to inform program and service design, as well as other organizational areas. It is important to link the data plan to the strategic plan, or a governance document, so that it has the attention and commitment of senior leadership, and perhaps the necessary allocation of resources. For the next iteration of the project, it is suggested that the project consultants work with agencies at the beginning of the project to help them design a strong data plan; this could also be in the form of providing agencies with resources, and/or as a part of a capacity building/coaching session.

- **Agencies need the appropriate data infrastructure and guidance on privacy requirements.**

The project forced agencies to review their current data infrastructure and identify any shortcomings. Some agencies realized they have inadequate systems and need help with digitization of data, as well as more effective data storage mechanisms that meet privacy requirements. This was especially true for grassroots organizations. Agencies noted that

they were unsure of how the privacy laws applied to collection, storage and sharing of data. For the next iteration of the project, it is recommended that the project consultants work with agencies at the beginning of the project to provide guidance on their data storage infrastructure and privacy requirements.

- **Building relationships with marginalized communities**

Agencies that serve Black communities noted individuals were hesitant to provide their social identity data. This is not surprising considering the historic and continued systemic racism and discrimination Black communities endure. Indigenous communities are also hesitant to provide their data due to similar reasons. Given that Black and Indigenous communities are the most marginalized and this is a data equity project, it is advised that the next iteration of the project prioritize relationship building with Black and Indigenous communities. As well, the BYSY project did not have any agencies that were Indigenous-led or focused. Onboarding the participation of more Indigenous-led organizations may be considered a priority for the next round. The importance of sharing the data back with the communities came up in the evaluation and in engaging with them to co-create solutions to respond to community needs. As well, agencies asked for a trauma-informed approach to this work and should also be taken into consideration. It is advised that for the next iteration, the project consulting team have a strong understanding of the history, and experiences of marginalized communities, in particular Black and Indigenous communities, and be able to incorporate a trauma informed lens within the BYSY project. Perhaps the consulting team may want to have team members with lived experience to provide guidance.

- **Bring the capacity building training in-house to agencies**

Agencies found the capacity building and coaching sessions to be very helpful from We All Count. However, some agencies found that none or only a handful of their staff could go to these sessions. The evaluation shows that due to staff capacity constraints some agencies may need in-house training or coaching sessions. One option would be to develop a train-the-trainer module. Another option would be to ensure participating agencies have a dedicated staff person that can attend the capacity building and coaching sessions and then conduct specialized training in-house with agency staff.

- **Extend the timeline of the project and data upload**

Agencies that did compile their data but did not upload it to the BYSY Data Collection Survey noted they had other competing priorities and deadlines during the time the survey was open. For the next iteration for the project, it is recommended that the data upload platform is offered at the launch of the project and there is additional time (a few extra months) given at the end of the project. Another option is to offer the data upload platform on a continuous

basis rather than placing a time frame. This may also provide for more robust data collection to provide deeper insights on data collection methods.

- **Have a co-creative design session before setting up the next pilot.**

In the Advisory Committee feedback session, it was noted that the challenges reported in phase 2 mirrored that of phase 1 of the project. It is important to note that phase 2 of the data equity project was conducted with a much larger pool of agencies which helped to confirm learnings from phase 1. It was noted that the next iteration of the project should address the challenges identified in phase 1 and 2 before moving on to implementation of phase 3. A suggestion was made to conduct a facilitated co-creative design session to address the challenges in the design of phase 3. This suggestion may want to be investigated further as part of planning for the next phase.

- **The need for a community of practice.**

In the evaluation interviews and Final Evaluation Event, agencies strongly advocated for a community of practice. They appreciated that the We All Count coaching sessions were an opportunity for agencies to share and learn from each other; however, these sessions were time limited. Many of the agencies expressed having an ongoing community of practice to continue to share knowledge, resources and learnings. It is clear from the lack of uptake of the online discussion forum that this community of practice should not be static, but rather facilitated through a virtual platform or to be in person (or a combination of both). For the next iteration of the project, it is recommended that alongside capacity building and coaching sessions that there is a community of practice, perhaps one that is designed and run by agencies.



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Prepared by



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