NATIONAL RESOURCE GUIDE

Enhancing National Sector Gender-Based Analysis (GBA) Plus Capacity Project

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Purpose

This GBA Plus Resource Guide is a national effort across all seven umbrella organizations that represent the immigrant and refugee sector in their respective provinces and regions. The project was led by the Alberta Association of Immigrant Serving Agencies (AAISA) in partnership with Affiliation of Multicultural Societies and Service Agencies of BC (AMSSA), Saskatchewan Association of Immigrant Settlement and Integration Agencies (SAISIA), Manitoba Association of Newcomer Serving Organizations (MANSO), Ontario Council of Agencies Serving Immigrants (OCASI), Atlantic Region Association of Immigrant Serving Agencies (ARAISA), and Fédération des communautés francophones et acadienne (FCFA).

The purpose of this National Project is to support the settlement and integration sector in addressing the diverse needs and intersecting identities of newcomers by enhancing the capacity of settlement agencies to apply Gender-Based Analysis (GBA) Plus approaches to their policies and programs. By embedding these principles into their organizational structures, policies, and service delivery, this guide provides essential tools and resources for organizations to begin or refine their GBA Plus implementation in their daily operations.

Content Warning

This guide was created to support your organization in deepening its understanding and application of GBA Plus, intersectionality, and equity-based practices. Engaging with these topics, especially when applied to real-world experiences, can be challenging. The tools provided may require reflection on complex and personal topics. It's important to acknowledge that who we are and what we bring to this work shapes how we contribute to building inclusive, accessible programs and services for the people we serve.

Some of the tools and materials in this guide explore sensitive topics such as personal and professional experiences of racism, homophobia, transphobia, gender-based violence, and other forms of discrimination. These discussions can evoke strong emotional responses or trigger past trauma. We encourage you to take care of yourself and others throughout this process and to approach these topics with caution and care.

Here are some suggestions for navigating this material:

- Seek Support: Reach out to a trusted person or professional who can help you process the material.
- Take Breaks: Pause and step away from the tool or activity if it becomes overwhelming.
- Use Available Resources: Should you need immediate assistance, we have provided links to online resources and tools (see below).

Additionally, if you're facilitating this work, it's recommended to have a trauma-informed counselor or mental health professional available during activities that touch on sensitive or triggering topics, particularly those related to gender-based violence.

Support Resources

- Employee Assistance Programs (EAP): If your organization provides an EAP, consider using it for additional support.
- Free National Mental Health Support.
- Indigenous Resources
    - First Nations Child and Family Caring Society: Knowledge Portal for Agencies across Canada
    - National Centre for Truth and Reconciliation
- Trauma-Informed Engagement Resources:
    - CMA Patient Voice Guide: Trauma-Informed Engagement & Resources
    - Canada.ca: Trauma- and Violence-Informed Approaches to Policy and Practice

National Resource Guide

1. Foundational GBA Plus Knowledge

Overview of Tools

The courses and resources in this section are designed to help introduce and strengthen your understanding of Gender-Based Analysis Plus (GBA Plus) and intersectionality, and how to apply these concepts within the newcomer serving sector. GBA Plus helps you consider how various factors like gender, race, age, and disability intersect to shape people's experiences. Internally, management can use these insights to guide the direction and priorities of their organization, ensuring that policies and workplace culture support equity for all staff. Externally, organizations can apply an equity lens to their policies, programs, and services to ensure that newcomers, with their diverse and intersecting identities, are treated fairly and equitably.

- Analytical Frameworks for Building Equity: An Educational Resource for the Immigrant and Refugee Serving Sector
- Ask a Knowledge Keeper Video
- GBA Plus 101: Resource for Immigrant and Refugee Service Providers
- GBA Plus Equity Frameworks Workshop
- GBA Plus Mastery: Advancing Equity in Francophone Immigration Services
- GBA Plus: Self Learning and Group Activities for Inclusive Programming
- SEASONOVA GBA Plus Courses
  - Course #1: An Introduction to Gender-Based Analysis (GBA) Plus
  - Course #2: Organizational Capacity Building Through a GBA Plus Lens
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  - Tip sheet for drafting Indigenous engagement strategies and working with survivors
  - Tip sheet for working with newcomers who are blind or partially sighted
  - Tip sheet for working with newcomers who are D/deaf or hard of hearing
  - Tip sheet for working with newcomers who have Alzheimer's disease
- "We don't need feminism anymore, do we?" – GBA Plus Interactive Activity

2. Organizational Strategies for Implementing GBA Plus

Overview of Tools

This section provides upper management with templates and resources to help them strategically assess their organization's internal structures, policies, and staff diversity. These tools are designed to support leaders in identifying gaps and opportunities, equipping them with the knowledge and strategies needed to foster a more equitable and inclusive workplace. The section is divided into two key areas: one focused on evaluating internal readiness to implement equity initiatives within the workplace, and the other on developing practices for equitable data collection, ensuring that decision-making is informed by accurate, representative information. Together, these resources will guide an organization along its GBA Plus journey, ensuring more equitable access to opportunities, programs, and services.

i. Internal GBA Plus Readiness

- Case Studies in Action: Strengthening Programs and Policies with GBA Plus and Intersectionality
- GBA Plus Policy Assessment Tool
- GBA Plus Program Assessment Tool
- OCASI Anti-Racism Anti-Oppression Organizational Assessment
- Settlement Sector Focused Board Diversity Survey and Matrix Templates
- Staff Diversity and Inclusion Identity Survey
- Staff GBA Plus Readiness and Capacity Survey Template

ii. Equitable Data Collection and Management

- Data Narratives Workshop
- Guide to Equity-Driven Data Management

1. Foundational GBA Plus Knowledge

Analytical Frameworks for Building Equity: An Educational Resource for the Immigrant and Refugee Serving Sector

Audience: Executive Director, Upper- and Middle Management, Frontline Workers
Duration: 4 hours including time for the reflection questions.

This educational resource provides key information and considerations for comparing different analytical frameworks and theories to build and promote accessibility, equity, diversity, inclusion, and anti-racism. It supports organizations in assessing and strengthening their capacity to build equitable policies, programs, procedures, and practices within the immigrant and refugee serving sector.

The analytical frameworks and theories explored in this resource are not exhaustive.

Ask a Knowledge Keeper Video

Audience: Executive Director, Upper- and Middle- Management, Frontline Workers and Volunteers. In applicable situations, SPO staff may choose to show the video to clients.
Duration: 11 minutes (13 minutes for version in American Sign Language)

In recent years, IRCC has prioritized Truth and Reconciliation work, especially pertaining to Call to Action #93. Truth and Reconciliation is foundational to equity work in Canada. To reflect the centrality of Indigenous perspectives to anti-oppression work, three Knowledge Keepers were interviewed and asked how newcomers and Indigenous peoples can build relationships with one another. The Knowledge Keepers shared how newcomers can best learn about Indigenous peoples, what should be in an anti-racism policy, and how newcomers and Indigenous peoples can work together to fight discrimination. The Knowledge Keepers in the video have ancestral ties to Saskatchewan and Ontario, but the concepts explored are applicable across Canada.

Accessibility features for this video include English captions, French subtitles and a version in American Sign Language.

GBA Plus 101: Resource for Immigrant and Refugee Service Providers

Audience: Executive Director, Upper Management, Board Members.
Duration: Approx. 20 - 30 minutes.

This tool introduces the concept of Gender-Based Analysis Plus by outlining its core elements. It highlights the application of GBA plus in developing programming, such as the use of targeted or flexible approaches to service delivery. Lastly, it provides some high level "Do's and Dont's" with examples for integrating GBA plus at an organizational level.

GBA Plus Equity Frameworks Workshop

Audience: The content of this workshop is intended for staff at all levels.
Duration: 1-1.5 hours, depending on existing familiarity with the topics covered and the time set aside for discussion.

This workshop is designed to increase understanding of the relationship between GBA Plus and equity frameworks, using IDEA (Inclusion, Diversity, Equity, and Accessibility) as the core example. It provides a conceptual grounding in GBA Plus and IDEA and lays out a model demonstrating their complementary nature. An example case study shows how these frameworks work together to further equitable program and policy solutions and then invites participants to apply the complementary frameworks model to their own work.

This workshop uses IDEA as the example equity framework. GBA Plus interacts in similar ways with other frameworks, such as ARAO, Liberatory Design, and decolonial approaches.

GBA Plus Mastery: Advancing Equity in Francophone Immigration Services

Audience: Executive directors, managers, frontline workers, volunteers, and policymakers in Francophone immigration services
Duration: Approx. 15 hours

*This course will only be offered in French.

This comprehensive, multi-level online training program equips professionals with the knowledge and skills to implement Gender-Based Analysis Plus (GBA Plus) effectively in Francophone immigration and settlement services. Hosted on the FCFA's LMS Platform Le Labo, it consists of three interconnected courses:

1. "Demystifying GBA Plus: Foundations for Inclusive Settlement Services" (Beginner)
2. "ACS Plus: From Theory to Practice" (Intermediate)
3. "Operationalizing GBA Plus in Francophone Immigration Services" (Intermediate)

The program covers fundamental concepts, implementation challenges, and practical applications through interactive exercises, real-world scenarios, and case studies. Upon completion, participants will understand GBA Plus principles, recognize personal biases, apply GBA Plus in daily work, and develop strategies for organizational change.

Content Warning: Content warnings for sensitive topics related to gender, sexuality, and systemic discrimination are included.

GBA Plus: Self Learning and Group Activities for Inclusive Programming

Audience: Executive Director, Upper- and Middle- Management, Board Members and Frontline Workers
Duration: Approx. 3 hours

This tool is designed to improve understanding of intersectionality and how it can be applied to support groups with unique vulnerabilities. It helps organizational staff apply GBA Plus principles more effectively through individual or small group activities that foster practical learning. This document invites readers to watch a series of video clips, followed by thought-provoking reflection questions to help critically engage with the material and deepen their understanding.

These activities support a deeper understanding of intersectionality and its practical application in fostering inclusivity.

SEASONOVA GBA Plus Courses

Course #1: An Introduction to Gender-Based Analysis (GBA) Plus
Course #2: Organizational Capacity Building Through a GBA Plus Lens

Audience: Frontline workers, middle- and upper- management, and board directors of newcomer-serving agencies.
Duration: Approximately 2 hours each including worksheets and quizzes.

Course #1 is an introductory level course that provides a general overview of what GBA Plus is in the context of providing services and supports to newcomers, immigrants, and refugees in Canada.

Course #2 explores the benefits of implementing GBA Plus in organizational policies, procedures, and practices for both the workplace and its clients.

These courses were developed in partnership with SEASONOVA, a BIPOC-, female-, and immigrant-led social enterprise offering consulting services in facilitation, adult education, strategic planning, and intersectionality analysis.

*Please note this course will be offered by AAISA at minimum once a year and may be available at other times with enough interest. Questions about registration through AAISA can be sent to pd@aaisa.ca

Four Tip Sheets

Many SPOs struggle to find the resources to adequately support newcomers with intersecting identities. These challenges are compounded by the fact that newcomers may have understandings of disability or Indigeneity that differ from those in Canada. Newcomers may not know that government-funded programs and services are available in Canada.

Tip sheet for drafting Indigenous engagement strategies and working with survivors

Audience: The target audience for this tool is frontline workers and volunteers.
Duration: 5-10 minutes to read the tip sheet.

This tip sheet features basic information on how to respect cultural protocols, support Elders, Knowledge Keepers and Survivors and foster mental wellness while drafting an Indigenous engagement and/or outreach strategy.

Tip sheet for working with newcomers who are blind or partially sighted

Audience: Frontline workers and volunteers.
Duration: 5-10 minutes to read the tip sheet.
Created in partnership with CNIB and Vision Loss Rehabilitation Canada

This tip sheet features a list of best practices as well as resources and links to support settlement workers in assisting clients who are blind or partially sighted.

Tip sheet for working with newcomers who are D/deaf or hard of hearing

Audience: Frontline workers and volunteers.
Duration: 10-15 minutes to read the tip sheet.
Created in partnership with Saskatchewan Deaf and Hard of Hearing Services

This tip sheet features a list of best practices as well as resources and links to support settlement workers in assisting clients who are D/deaf or have hearing loss as well as their families.

Tip sheet for working with newcomers who have Alzheimer's disease

Audience: Frontline workers and volunteers.
Duration: 10-15 minutes to read the tip sheet.
Created in partnership with the Alzheimer Society of Saskatchewan

This tip sheet features basic information on Alzheimer's disease as well as other forms of dementia and describes how they may impact newcomer clients. The sheet also includes a list of best practices and recommendations to use when working with clients who have dementia.

"**We don't need feminism anymore, do we?**" – GBA Plus Interactive Activity

Audience: Executive Directors, management, frontline workers and volunteers. Where applicable, SPOs may choose to lead the activity with clients.
Duration: Assembling the materials takes 30-40 minutes. The activity itself takes between 60-75 minutes to complete.

This tool requires a facilitator.

This tool is an interactive role-playing activity that can accommodate up to 20 participants.

The tool is designed for social service workers wishing to expand their understanding of GBA Plus, intersectionality, and feminism. Participants will explore the difference between "equality" and "equity" through the experiences of women in the 21st century workforce, including newcomers to Canada. Participants will discover how intersecting identity points shape a person's understanding of the world. The activity is followed by discussion questions and a debrief session.

Content Warning: This activity shares statistics and true-to-life scenarios on gender-based sexual assault and violence that may be triggering for some. It is recommended that a counselor or other mental health resource(s) is/are available to participants during and following the activity.

The Government of Canada offers 24-hour, toll-free crisis support for those impacted by the issue of Missing and Murdered Indigenous Women, Girls and Two Spirit People. This service can be accessed by calling 1-844-413-6649.

2. Organizational Strategies for Implementing GBA Plus

The courses and resources in this section are designed to help introduce and strengthen your understanding of Gender-Based Analysis Plus (GBA Plus) and intersectionality, and how to apply these concepts within the newcomer serving sector. GBA Plus helps you consider how various factors like gender, race, age, and disability intersect to shape people's experiences. Internally, management can use these insights to guide the direction and priorities of their organization, ensuring that policies and workplace culture support equity for all staff. Externally, organizations can apply an equity lens to their policies, programs, and services to ensure that newcomers, with their diverse and intersecting identities, are treated fairly and equitably.

i. Internal GBA Plus Readiness

Case Studies in Action: Strengthening Programs and Policies with GBA Plus and Intersectionality

Audience: Executive Director, Upper- and Middle- Management, Board Members
Duration: Approx. 1 hour

This resource presents real-life case studies of settlement workers who used a GBA Plus lens to address challenges or gaps in their programs and policies. By applying GBA Plus, they found solutions that made their services more inclusive and equitable, addressing the diverse needs of clients.

After reviewing these case scenarios, readers are provided a template to reflect on challenges encountered in program design, delivery, evaluation, and organizational policies. The focus is on enhancing the use of GBA Plus within their organizations.

The resource is designed for small group discussions, sparking dialogue about organizational structures and how GBA Plus can enhance program effectiveness and inclusivity.

GBA Plus Policy Assessment Tool

Audience: Executive Director, Upper- and Middle- Management, Board Members
Duration: Approx. 1-2 hours

This tool helps organizations integrate a GBA Plus perspective into their policies and initiatives by evaluating whether gender and intersecting identity factors are adequately addressed. It provides a structured process for identifying strengths and areas for improvement.

Adapted from guidelines by the Canadian Department of Women and Gender Equality for the Immigrant and Refugee Serving Sector, this tool supports a comprehensive review of new and existing policies. It guides users through key areas such as Relevance and Design, Delivery and Implementation, and Effectiveness. Organizations can use this tool to complete sections on policy details, review summaries, and suggest mitigation strategies, ultimately enhancing inclusivity and equity in their policies.

GBA Plus Program Assessment Tool

Audience: Executive Director, Upper- and Middle- Management, Programming and Front-Line Staff
Duration: Approx. 1-2 hours

This tool helps organizations evaluate their programs, workshops, or services using a GBA Plus approach. It identifies gaps in how intersecting identity factors are considered within organizational initiatives. The tool features specific assessment questions adapted from the Canadian Department of Women and Gender Equality's GBA Plus training and tailored for the Immigrant and Refugee-Serving Sector.

This tool will help organizations improve how GBA Plus principles are applied during program design and implementation, ensuring inclusivity and identifying areas for improvement. To use the tool, organizations complete sections covering key areas such as program details, relevance, design, delivery, effectiveness, and an overall review summary.

OCASI Anti-Racism Anti-Oppression Organizational Assessment

Audience: Any level of involvement at the organization: Staff, management, board members and volunteers.
Duration: Approx. 2 hours with room for discussion.

This tool is designed to evaluate the current application of anti-racism anti-oppression principles and practices at immigrant and refugee serving organizations across three areas: (1) Organizational Accountability; (2) Implementation and Application; and (3) Principles and Culture. It provides a starting point for the identification of strengths, weaknesses, and gaps across the three key areas. After completing the assessment, users should consider how the information collected will inform further strategic action to create and sustain anti-racist and anti-oppressive organizational change and development.

Settlement Sector Focused Board Diversity Survey and Matrix Templates

Audience: Executive Director, Board Members
Duration: Approx. 30 - 60 minutes to complete survey; 60 - 90 minutes to complete the matrix; 60 - 90 minutes to reflect on the findings

This tool offers a brief overview of the importance of board diversity and leadership commitment to equity work. It provides a settlement-sector-focused board diversity survey and matrix template that organizations can adapt to their context to assess board representation. Data is first collected anonymously from all board members through the diversity survey then aggregated and entered into the board diversity matrix. Once the matrix has been completed the Board Chair and other board members can reflect on the representativeness of their board–across categories–and use this as a starting point for addressing any demographic, skillset, or experience gaps that may have been identified moving forward.

Staff Diversity and Inclusion Identity Survey

Audience: Executive Director, Upper- and Middle- Management, Board Members
Duration: Survey design and planning up to 4 weeks, filling out the survey approximately 30 min max.

The **Staff Diversity and Inclusion Identity Survey** is a three-part tool designed to help organizations assess and improve diversity, equity, inclusion, and belonging within their workforce. The tool consists of three separate documents:

1. **Survey Guidelines:** This provides a framework for organizations to evaluate their diversity practices. It outlines assessing intersectional identities, reviewing staff and leadership representation, and aligning policies with staff diversity. It also includes tips on launching the survey, promoting staff participation, and offering mental health support, if needed.
2. **Sample Survey:** This customizable survey is designed to collect a comprehensive snapshot of the workforce's diversity. It helps organizations identify gaps in representation, inclusivity, and potential barriers while also serving as a tool for tracking progress over time.
3. **Working with Staff Data Document:** This document offers instructions for handling confidential survey data, ensuring it is used responsibly to guide policy and recruitment efforts and improve organizational practices.

These three components are interconnected and designed to support an organization's efforts to foster a more inclusive work environment.

Staff GBA Plus Readiness and Capacity Survey Template

Audience: Executive Director & Upper-Management (to administer), Frontline workers (to complete)
Duration: Approx. 15-20 minutes to complete

This tool provides a brief overview of the importance of establishing a baseline understanding of staff readiness and capacity to implement GBA Plus in their work. It includes a staff GBA Plus readiness and capacity survey template that organizations can use to obtain an understanding of where they are starting in terms of knowledge, skills, and resources, which in turn, can assist them in planning how to integrate, or strengthen, their GBA plus capacity moving forward. This survey can also be readministered over time to track progress.

ii. Equitable Data Collection and Management

Data Narratives Workshop

Audience: Executive Director, Upper- and Middle- Management, Frontline Workers
Duration: 1-1.5 hours

Data narratives are a framing device useful for conceptualizing the ways an agency uses data. This workshop is designed to increase understanding of the role data plays in GBA Plus and equity work through data narratives. It is intended to build both knowledge and confidence around employing data in the pursuit of equity while incorporating key equity principles into data. It begins with an overview of the importance of data, the concepts of GBA Plus and data equity, and their role in driving equity-focused work. Following a case study example for constructing a data narrative, it opens space for participants to explore data narratives in their work.

Guide to Equity-Driven Data Management

Audience: Executive Director, Upper- and Middle- Management.
Duration: Completion of the data practices evaluation and drafting of a data management strategy through the guide's workbook sections may be expected to take two to six months.
This timeframe will vary greatly depending on internal structures and resources.

This guide provides agencies a grounding in the foundations of data management and equity through key terms, GBA Plus, and key data equity principles. It then explores five phases of developing a comprehensive data management strategy: identifying data needs, evaluating current practices, designing a strategy, implementing the strategy, and ongoing monitoring and evaluation.

Each section includes explanatory text, supporting worksheets and illustrative case studies for both larger and smaller organizations. The guide culminates in a sample template to produce a complete draft of a data management strategy. Appendices provide expanded explanations of six core data practices: standards, collection, quality, curation, analysis and use, and monitoring and evaluation, as well as worksheets for assessing each practice.

Foundational GBA Plus Knowledge

Analytical Frameworks for Building Equity: An Educational Resource for the Im/migrant and Refugee Serving Sector

Introduction

The im/migrant and refugee serving sector has a key role to play in confronting and combating systemic racism and oppression. This educational tool provides key information and considerations for comparing different analytical frameworks and theories to build and promote accessibility, equity, diversity, inclusion, and anti-racism. Its goal is to support organizations in assessing and strengthening their capacity to build equitable policies, programs, procedures, and practices.

The various different analytical frameworks and theories explored in this resource are not exhaustive, but are some of the most common approaches towards building accessibility, equity, diversity, inclusion, and anti-racism within the im/migrant and refugee serving sector. This resource only includes a brief 'snapshot' of each of the frameworks or theories. A reference list is provided at the end of the resource so that readers may further explore each of the various topics in depth.

Selecting and Using an Analytical Framework or Theory:

Organizations focused on creating barrier-free and equitable workplaces and services are often challenged by the complex and diverse priorities and needs of their service-users, staff, leadership, and community members. Using a guiding analytical framework or theory is a common strategy to align organizational values, mission, policies and operational practices to ensure it is meeting its commitments and the priorities to the communities it serves.

When selecting which analytical framework or theory to use, organizations/teams should consider a variety of different factors, such as: the target group(s); the social, political, economic, cultural, and environmental contexts, as well as the purpose of the analysis and its desired outcomes.

Depending on context, organizations may apply multiple frameworks to provide a comprehensive assessment of diverse needs for different target populations/communities. The aim is to produce the most inclusive and equitable outcome(s) that adheres to the principles of the organization and its operational, service delivery, and advocacy priorities.

A Process for Analysis

The 5-step analysis process is one example of how organizations can assess current priorities and determine the analytical frameworks. Organizations can use various strategies, methods, and resources to help build capacity and achieve priorities and goals to build equity.

1. **Identify** what is being reviewed or assessed:
    *   This step will vary depending on the current objective and the organization's overall priorities. Consider the scope of the analysis and how it can strengthen aligning the organization's commitments to equity, accessibility, inclusion, diversity, anti-racism anti-oppression, etc.

2. **Determine** the most suitable framework/theory(s) that will be used to analyze the practice, policy, program, procedure, etc.
    *   Consider whether consultations with connected communities or third parties can further support the review or assessment and offer insight into potential recommendations for change.
    *   Consider where the sources of information needed for the analysis can come from (i.e. existing data, qualitative vs. quantitative data, literature, focus groups, informal feedback, etc.)

3. **Revise** or change the current practice, policy, procedure, or process: Revise or update the policy, procedure, process, or practice under review or assessment and determine if it meets people's or the group's needs by advancing equity, diversity, inclusion, and accessibility.

4. **Introduce** or provide updates on the reviewed/revised practice, policy, program, or procedure.
    *   Communicate the process and changes to practices, policies, programs, or procedures that impact organizational perspective, staff work, service delivery, and the intended outcome or goal for the communities and members the organization serves.

5. **Assess** the impact of the change:
    *   Assess and reflect on how recent changes impact leadership, employees, and clients/customers. The organization can take this opportunity to identify and name any gaps, seek areas of improvement, or continue to enhance or advance organizational changes.

Analytical Frameworks and Theories:

Organizations may use various theories, approaches, and analytical frameworks to challenge and remove systemic barriers, racism, and oppression. Each approach has unique objectives, applications, and limitations that impact how it is applied and the outcomes for individuals, groups, and organizations. Below is a chart of relevant frameworks, theories, and approaches that can support reviews and assessments. It is important to note that these frameworks, theories, and approaches are not exhaustive.

Framework / Theory: Gender-Based Analysis Plus

An analytical tool used to support the development of responsive and inclusive policies, programs and other initiatives developed by the government of Canada.

Key Features	Examples	Limitations
- Great for undertaking a gender and diversity-sensitive analysis that is evidence-based, and informed by data and experience of various stakeholders. - Goes beyond gender to recognize the impact of other identity factors that impact individual or group experiences (e.g. race, faith, age, ability, etc.) - Designed to be a flexible and adaptable approach that addresses gaps to inequitably and barriers to participation. - Commitment to gender equality as per the Charter of Rights and Freedoms, and has a legislative basis enshrined in IRPA (Immigration and Refugee Protection Act). All Federal departments and agencies are required to integrate GBA Plus into all: - Memoranda to Cabinet; - Treasury Board submissions; - Regulations; - Budget proposals.	- Analyzing the gender pay gap within im/migrant communities and developing strategies to promote equal pay for equal work amongst diverse communities. - Examining the intersectionality of gender, ethnicity, and immigration status in accessing social services and support networks for employment and education. - Considering how gender impacts health and safety outcomes in private and public realms or settings.	- The lack of disaggregated data poses a significant challenge to applying GBA Plus, as it affects the ability to understand how different policies and initiatives impact diverse stakeholders. More specifically, there may be challenges in effectively integrating intersectional perspectives into policies and programs that are based on evidence. - The "plus" is an "addition" rather than an integrated part of the analysis. People still interpret GBA plus as a tool to first and foremost explore the differential impact of gender. - GBA plus is not well known or understood outside of the federal government. It does not connect the need for gender-equity to other systems of power or domination (i.e. patriarchy, capitalism, etc.) and does not explicitly emphasize systemic change to address the root causes of inequity.

Reflection Questions:

- What are the sources of "data" for your GBA plus analysis? Are they informed by a variety of different types of data and information?
- Does your analysis consider environmental, cultural, social, political, religious, and economic contexts that impact diverse groups of women, men, and gender-diverse people?
- Does your analysis over-simplify/generalize the experiences, potential outcomes, and access to resources, services, and information of groups of women, men, and gender-diverse people?
- Does your analysis include considerations of the systemic barriers created by the related organizations/institutions/systems/?

Framework / Theory: Anti-Racism

An anti-racist framework supports identifying, challenging, and changing structures and systems that perpetuate systemic, institutional, and individual racism in our society.

Key Features	Examples	Limitations
• Race and racism are the starting point for understanding the various types of inequity and discrimination facing racialized individuals and groups. • Recognizes the impacts (historical and present) of racism on the lived experiences of Indigenous, Black, and racialized people and seeks to prevent and mitigate inequitable outcomes and power imbalances in our society. • Anti-racism as a practice emerges from Black and other racialized equity-seeking groups in their fight for equality, justice, and humanization. The focus is on changing the existing systems that uphold racist and discriminatory beliefs, attitudes, policies, laws, and institutions. • Race, nationality and ethnic origin are protected grounds under the Canadian charter of Rights and Freedoms.	• Taking action to remediate covert and overt forms of racism or microaggressions, including considering how later racism may be perpetuated and experienced by staff and clients. • Examining how internal or external systems and structures lead to unequal access to opportunities or resources. • Analyzing how certain practices, ideologues, behaviours, or attitudes limit or undermine understandings of racism and its manifestations and the impact on various groups and individuals.	• Can often be used as a one-size-fits-all approach that does not account for the different experiences of different racial groups or individuals. For example, Anti-Black racism is experienced differently than Anti-Asian racism. • May highlight injustice, inequity, and discrimination between racial groups but needs to intentionally incorporate an intersectional approach to racism and anti-racism in practice. • Is often only applied on the inter-personal level, i.e. interactions between individuals, rather on the systemic level or institutional level. • Anti-Racism is sometimes criticized for its focus on analysis and understanding the systemic and underlying causes of inequity and discrimination, rather than providing concrete and actionable steps towards change.

Reflection Questions:

- What is the specific change you are trying to achieve by using an anti-racist practice or approach?
- How are the relevant internal and external systems influencing and impacting the existing and desired outcomes?
- What are some potential solutions at various levels (systemic, institutional, and individual)?
- What other practices, policies, programs, or procedures are in place to ensure the full integration of anti-racism within the organization?
- Has the organization considered internal dialogue and staff capacity to engage and participate in anti-racism practices? How has it been communicated or championed? Have we identified any gaps? What systems exist for reporting, feedback, investigation, and review processes?

Framework / Theory: Anti-Oppression

Anti-oppressive practices promote actions and practices that create environments free of oppression for all.

Key Features	Examples	Limitations
• Oppression is broadly interpreted as any imbalance of power that creates barriers for specific "social groups." An anti-oppressive framework examines systemic basis for inequity within society that impact groups differently. • Acknowledges individual characteristics and intersections to promote equity across and between various identities, people, and groups (ex. Age, gender, sex, race, ability, faith, etc.) • An approach that seeks to create environments of belonging free of systemic, intuitional, and individual oppressions and forms of discrimination named by individuals and groups and those named and protected under legislation. • Is often positioned with anti-racism to strengthen the analysis of racial inequity.	• Consider how workplace dynamics and hierarchies impact individual experience and access to resources and opportunities, including power dynamics, role responsibilities and expectations, and leadership. • Poor communication can lead to mistrust, frustration, and further experiences of oppression within the organization where there is a lack of direction, understanding, capacity accountability and leadership. • Providing regular and relevant training and updates and creating forums for discussion or feedback to engage, encourage, challenge, and understand various forms and manifestations of oppression.	• Can lead to simplistic views and minimize or misrepresentation of experience, directly impacting diverse groups of people. • Does not always challenge systemic inequities or racism experienced differently by groups and may not account for histories or historical components that impact present-day experiences, including personal ideologies, beliefs, behaviours, attitudes, and system inequities. • Can often be used as a one-size-fits-all approach that does not lead to anti-oppressive practices, attitudes, or behaviours.

Reflection Questions:

- What groups or considerations have we yet to include in the research/analysis/outcome? Are other policies, practices, procedures, and processes in place to cover other oppressions or marginalization? Is this information accessible to all staff and other relevant parties?
- Is the physical, psychological, and cultural environment conducive or supportive of anti-oppression? What gaps can we identify to create an anti-oppressive environment?
- Is our understanding (leadership, staff, etc.) of anti-oppression at all levels so strong that we can effectively practice it? Have we assessed the organizational capacity? If not, what can we do to engage in and practice anti-oppression?
- Do we provide ongoing, relevant training or discussions to support anti-oppression at all organizational levels?

Framework / Theory: Equity, Diversity, and Inclusion (EDI)

Aims to create fair and just practices and environments by including diverse representation where everyone is respected and can fully participate.

Key Features	Examples	Limitations
- Prioritizes creating welcoming spaces that recognize, promote, and advocate for diverse spaces. This prioritizes, encourages, and engages difference—differences in abilities, thoughts, experiences, skills, and talents, etc. - EDI considers qualities, experiences and identities that shape individual and group experiences in contrast to equality, where everyone is treated equally without concern for characteristics or dimensions of identity. - Often used to provide concrete actions or pathways for "diverse groups" to participate or integrate into a larger group, while recognizing their difference.	- Examining policies, procedures, processes, and practices that can support a range of needs from diverse groups and recognize a spectrum of personalities, styles, capacities, and thoughts/perspectives. - Assessing environments to create welcoming spaces that recognize and actively seek to engage and include a range of identities, thoughts, perspectives, skills, and talents.	- Does not critically engage components of race, culture, dis/ability, histories, geographies, ideologies, class/caste, gender and gender expression, and other characteristics, identities, and other identities, including environmental, economic, political, religious, and social that shape, impact and influence individual or group experiences. - Can equate difference with sameness across groups, further oppressing or erasing the unique experiences or needs of different people or groups. - Assumes a basis of trust between institutions/systems and equity-seeking groups. There focuses on "micro-level" (i.e. individual) assimilation into a broader organizational, institutional or societal culture, rather than on changing the systemic basis for exclusion.

Reflection Questions:

- Does the organization currently have diverse representation at all levels of the organization? Is the organization representative of the community it serves? And if not, what measures are in place to ensure representation and the full participation, respect, and inclusion of different people?
- How does the organization ensure or measure how people feel about the organization internally or externally?
- What can we learn from past incidents to inform our current equity, diversity, and inclusion practices?
- What resources are in place to help support the full integration or practice of equity, diversity, and inclusion in the organization? If none exist internally, does the organization collaborate with third-party providers to support these in the workplace?

Framework / Theory: Human Rights Framework

Promotes and protects individual rights by recognizing, promoting, and upholding laws and policies that are local, national, and international.

Key Features	Examples	Limitations
• Emphasizes upholding international human rights law, and a humanistic approach to protecting individuals' inherent rights as human beings. • Focuses on empowering vulnerable or underserved groups on grounds protected under the human rights legislation (i.e. Canadian Charter of Human Rights, Ontario Human Rights Code, etc.) • Develops capacity of state actors and non-state actors as rights-holders and duty-bearers, and recognizes the role of the state in protecting its citizens and residents. • Human Rights framework that emphasizes concepts like "dignity, respect, justice, and fairness" that are not necessarily explicit in other frameworks.	• Ensuring that labour migration policies and practices uphold the human rights of migrant workers, including fair wages, safe working conditions, and protection from exploitation. • Promoting accountability mechanisms to address instances of discrimination or human rights violations in the workplace, housing, healthcare, and justice system, particularly for vulnerable im/migrant populations	• Relies on governments' and organizations' political will and commitment to prioritize human rights, and reinforces the power and authority of the state. • Implementation and monitoring processes may face challenges where human rights are not universally respected or enforced, or subject to interpretation. • The distinction between absolute and non-absolute rights can create complexities in balancing rights with restrictions for individuals and groups. For example, human rights may be subject to formalities, conditions, restrictions, and penalties in the interests of national security, public safety, or the protection of others' rights and freedoms. • Is a "blunt instrument" in practice (i.e. slow judicial process, subject to formalities, may be inaccessible to some).

Reflection Questions:

• How do laws and rights protections inform our organizational practices? Is there a difference across levels? How does the organization manage or mitigate that? What sources or resources are in place (internal and external) to support organizational commitment and will to advocate for human rights broadly and as they impact specific groups?
• How does the organization view, engage in, and ensure accountability and advocate for protections to address discrimination or human rights violations? What are our organizational limitations?
• How does the organization collaborate with communities to educate and empower vulnerable and underserved groups? How does the organization ensure their safety and reduce perpetuating or causing harm?
• Are there any past experiences we can learn from to help inform how the organization operates in the future?

Framework / Theory: Critical Race Theory

Interrogates assumptions that equate liberal order with equality by centring counter narratives and by analyzing race and racial power between individuals and groups.

Key Features	Examples	Limitations
- Interrogates race and racial power. - Examines the relationship between social structures and ideals. - Acknowledges situational circumstances and complexities of equity-seeking communities. - Prioritizes and centers voices and experiences of equity-seeking groups.	- Examining how the unconscious impacts individual or group experiences, such as internalized racism, gender or group dynamics and the impact of systems on private, personal, and professional life. - Exploring concepts such as the "pipeline to prison" and how it interacts with law and racial power. For example, the impact of law and racial power on racialized communities, particularly concerning immigration detention and deportation policies. - Analyzing the intersection of race and immigration status in shaping experiences of discrimination and marginalization within the labour market	- Implementation may encounter resistance from individuals or institutions invested in maintaining existing power structures. - Conflation with other frameworks of our theories can minimize the breadth and impact of analysis and outcome. - Challenge in balancing perceptions of equity within political, social, and legal realms, systems, and structures.

Reflection Questions:

- Have we analyzed race, religious power, division of labour, etc., within our governance, policies, procedures, and processes?
- Do we generalize or oversimplify situational experiences that can be harmful or negatively impact individual or group experiences?
- Have we generalized our equity, diversity, and inclusion practices, policies, procedures, and processes?
- Have we considered diverse groups' unique historical and present-day experiences and the impact of race and racial power on individual and group experiences?
- Have we considered the legal implications and consequences of race and racial power on individual and group experience and how they can impact the organization internally and externally?

Framework / Theory: Critical Disability Theory

Utilizes an action-orientated transformative approach and expands worldviews and understanding of disability to include intersectionality and interconnectedness.

Key Features	Examples	Limitations
- Challenges conventional disability studies by positing disability as a continuum. - Recognizes that disabilities and abilities are not fixed characteristics but are shaped by social, cultural, historical, and political factors. - Engages with intersectionality, recognizing the interconnectedness of disability with other forms of oppression. - Seeks to denaturalize dis/ability and challenge ableism. - Considers alternative perspectives and sites of knowledge production and that people living with disabilities are leading.	- Investigating the impact of disability on employment opportunities and workplace accommodations for im/migrants with disabilities, including challenges in accessing suitable jobs and support services. - Advocating for inclusive immigration policies recognizing the rights and contributions of people with disabilities. - Advancing inclusive and equitable access to resources, opportunities, services, programs and service delivery, transportation, education, housing, and healthcare. - Challenging stereotypes and biases related to dis/ability in the labour market, promoting a more inclusive and diverse workforce that values skills and abilities.	- Developing discipline with blurry boundaries of dis/ability and determining who qualifies as disabled. - Implementation may be hindered by policy makers and decision makers due to the resources necessary to change infrastructure and materials. - Requires addressing internal biases and to continuously promote inclusivity within organizations, which changes over time.

Reflection Questions:

- How has the organization understood dis/ability? Is the view limited, specific, or exclusionary? What changes can we make to the organization's understanding of disability/ability?
- Do we go beyond traditional understandings of dis/ability? Have we considered physical, historical, racial, psychological, and other forms of dis/ability that impact organizational structures, culture, knowledge, and practices?
- How do we ensure that our practices related to critical disability are reflective, inclusive, or representative of all groups?
- What measures are in place to help further understand dis/ability and how they impact organizational affairs and relationships?

Framework / Theory: Intersectionality

Intersectionality is a theory and analytic framework coined by African-American scholar Kimberlé Crenshaw. It analyzes the complex and interconnected way social categorizations (e.g., race, class, gender, age, etc.) and the corresponding interdependent systems of discrimination or disadvantage overlap in the experience of oppressed and marginalized individuals.

Key Features	Examples	Limitations
- Intersectionality challenges dominant thinking about systems and structures, and emphasizes reframing or generating new ways of producing and using knowledge. 'Matrix of Domination' helps ground understanding, use, and application by examining interrelated domains that organize power (structural, disciplinary, hegemonic, and interpersonal domains). - Integrative analysis and practice that see significant systems of oppression as overlapping and interlocking. - Helps expand assessment or examination from singular or exclusionary perspectives that further produce racist and oppressive outcomes to one that seeks more inclusive, responsive, and equitable outcomes.	- Examine how courts and the justice system frame and interpret experiences of Black, Indigenous, Brown, Queer, and equity-seeking groups, including im/migrants and refugees. - Consider and examine how policy impacts individual experience and choice differently through their participation in the workplace for women of colour, im/migrants and refugees. - Promoting and integrating non-white knowledge to support reviewing practices, policies, procedures, and programs that impact equity-seeking groups, including m/migrant and refugees.	- Dismissal or lack of understanding of the impacts of race, class, and gender on diverse groups. Distinct factors can significantly impact this and how solutions are produced or remedied. - Challenges to reorienting or including framing or understandings that center non-traditional or non-white perspectives of knowledge production, introduction, and use. - Is criticized for staying too theoretical rather than providing tools for building solutions and actions. - Can result in a fragmented understanding of broader systems of power and how they continue to operate by oppressing groups (i.e. focus on individual lived experience).

Reflection Questions:

- Do we make any generalizations about intersectionality, and how can this harm diverse groups?
- Do we have the knowledge or capacity to understand the complexity of intersectionality? How can we manage the harmful impacts or outcomes of intersectionality through capacity and knowledge building?
- How do we shift, integrate, and center non-traditional or non-white perspectives and forms of knowledge production to reorient new ways of thinking, relationships, and ways of being and doing?
- Have we considered systems of power and how power is organized in the organization? How is the organization informed by external systems of power (structural, disciplinary, hegemonic, and interpersonal)? How does the organization challenge or recreate power struggles within the organization?

Framework / Theory: Decolonization

Engages transdisciplinary discourse, empowerment, and agency through critical reflection and prioritizing Indigenous perspectives and knowledge.

Key Features	Examples	Limitations
- Complex, ongoing process involving relinquishing colonial power and unlearning the practices which uphold it, and replacing knowledge and practices with Indigenous knowledge and worldviews. - Emphasis on authenticity and the analysis of colonial mechanisms both in the history and present day treatment of Indigenous peoples in Canada and beyond. - It encompasses addressing historical injustices, restoring Indigenous sovereignty and self-determination, and fostering truth, reconciliation, and healing between Indigenous and non-Indigenous peoples.	- Respecting Indigenous cultures, traditions, and worldviews in program design to ensure that interactions with Indigenous clients or communities are respectful and culturally appropriate. - Reviewing current organizational structures, systems, practices, and culture by consulting, working with, and including Indigenous perspectives and knowledge. - Advocating for policy changes that address systemic barriers faced by Indigenous peoples, and that advocate for Indigenous sovereignty.	- Implementation may face resistance from those benefiting from colonial systems. - Challenges in balancing Indigenous and Western knowledge systems and perspectives. - Restorative justice practices may be controlled by Western institutions and ideologies, hindering full decolonization and, in turn, exacerbating limitations within traditional conflict resolution processes, such as patriarchal structures and lack of representation.

Reflection Questions:

- What are the definitions and meanings of decolonization within the organization? How do we adhere to or uphold decolonization practices?
- Do we reflect on, include, and prioritize Indigenous perspectives or knowledge? What would that look like in the organization?
- Have we considered how we might perpetuate harm even with the best intentions? What parameters are in place to advance decolonization efforts and protect Indigenous perspectives and knowledge?
- How does decolonization work within other antiracist and anti-oppressive frameworks?
- What relationships have we established within the community, and do we engage in ongoing discussions with our community partners? How does the organization include Indigenous perspectives or knowledge in its organizational activities?

Consultant

Asha Edwin of ASHARE Group Inc., with the support of Junior Advisor Hannah Loffelmann, created this supplemental tool for the OCASI-AAISA collaboration to support the organizational introduction and implementation of the sector-wide Anti-Racism and Anti-Oppression Policy.

Resource
Examining and reflecting upon decolonization and Indigenous solidarity work:
https://equitableeducation.ca/2013/reflecting-decolonization

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Ask a Knowledge Keeper Video

In recent years, IRCC has prioritized Truth and Reconciliation work, especially pertaining to Call to Action #93. Truth and Reconciliation is foundational to equity work in Canada.

To reflect the centrality of Indigenous perspectives to anti-oppression work, three Knowledge Keepers were interviewed and asked how newcomers and Indigenous peoples can build relationships with one another. The Knowledge Keepers shared how newcomers can best learn about Indigenous peoples, what should be in an anti-racism policy, and how newcomers and Indigenous peoples can work together to fight discrimination. The Knowledge Keepers in the video have ancestral ties to Saskatchewan and Ontario, but the concepts explored are applicable across Canada.

The video can be accessed online via the links below:

English captions
French subtitles
American Sign Language

GBA Plus 101: Resource for Immigrant and Refugee Service Providers

This resource provides a brief overview of GBA Plus and its use for developing programs and services at community organizations in the im/migrant and refugee serving sector.

What is GBA Plus?

Gender-Based Analysis (GBA) Plus is "**an analytical tool used to support the development of responsive and inclusive policies, programs, and other initiatives**" developed by the Government of Canada in 1995.[1]

GBA Plus was initially designed to assess for the differential impact of policy and programs on women and girls, however, in 2011, the "**plus**" was added in recognition of other diverse identity factors, such **as age, ethnicity, sexual orientation, disability, education, economic status, religion, race, language, indigeneity, and geography** that also intersect with sex and gender to reinforce inequities.

Many organizations within the im/migrant and refugee serving sector already use a diverse number of equity-building practices and frameworks that have emerged from Black, Indigenous, intersectional feminist, Queer, (dis)abled and other equity-seeking (equity-deserving) perspectives and communities. **As an analytical tool, GBA Plus shares similarities to other frameworks and practices designed to challenge and remove systemic barriers, however, each framework has their own unique histories, objectives, and foci**.

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1 https://women-gender-equality.canada.ca/en/gender-based-analysis-plus/what-gender-based-analysis-plus.html

For example, OCASI has a stated commitment to Anti-Racism Anti-Oppression (ARAO) and uses an intersectional ARAO framework where race or racialization are the starting point for analysis. In comparison, GBA Plus begins with an analysis of sex and gender. Both approaches can be used to assess for gaps and barriers for specific groups of equity-seeking groups, and to create equitable programs, policies, and outcomes for clients or individuals.

How can I integrate GBA Plus into Program and Service Design?

It is important to remember that GBA Plus is an analytical tool that can be applied to a wide variety of scenarios, and that there is no single step-by-step 'formula' that will fit every application. Rather, according to Women and Gender Equality Canada, GBA Plus is an adaptable process consisting of the following core elements:

- Identifying Issue(s)
- Challenging Assumptions
- Gathering the Facts: Research & Consult
- Developing Options & Making Recommendations
- Monitoring and Evaluation

The above **core elements can be applied in tandem with other approaches to better fit the context and goals of the analysis**. For example, some Indigenous organizations will incorporate Indigenous values, teachings, and knowledge into their application and use of GBA Plus to ensure that it is relevant for needs and priorities of Indigenous communities.[2]

No matter the context, a GBA Plus approach to developing programming requires showing: **(1) who is impacted by an initiative across multiple intersecting characteristics and factors; (2) why the initiative meets diverse needs of the people most impacted; (3) how to mitigate any barriers to accessing or benefitting from the initiative**.[3] This analysis may illustrate the need to develop either targeted or flexible programming:[4]

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2 Government of British Columbia, Indigenous GBA+ toolkit: https://www2.gov.bc.ca/gov/content/governments/indigenous-people/minister-s-advisory-council-on-indigenous-women-maciw/gender-bases-analysis

3 https://women-gender-equality.canada.ca/en/gender-based-analysis-plus/what-gender-based-analysis-plus.html

4 https://women-gender-equality.canada.ca/gbaplus-course-cours-acsplus/eng/mod03/mod03_06_01.html

Targeted: GBA Plus analysis may reveal the need to prioritize services for specific groups of people facing systemic marginalization and oppression. Examples: Mental health programming for racialized transgender migrants; Reproductive health campaign targeting francophone youth.

Flexible: GBA Plus analysis may reveal the need to create flexible or universal programming that can respond simultaneously to the diverse needs of many different individuals or groups. Example: Drop-in support services for immigrant parents; Public awareness campaign on anti-racism.

What are some best practices for implementing GBA Plus?

Successfully integrating a GBA Plus approach requires ongoing effort! The following 'Do's and Don'ts' are recommendations based on Women and Gender Equality Canada's GBA Plus online course to support successful implementation.[5]

5 https://women-gender-equality.canada.ca/gbaplus-course-cours-acsplus/eng/modA3/modA3_01_01.html

Do create a committee or unit with decision-making power to lead, support, and monitor the implementation of a GBA Plus framework.	**Don't task Human Resources to be responsible for leading GBA Plus!** Put in the work to establish a group, such as a strategic policy unit with a broad reach at the organization.
Do undertake an organizational needs assessment to identify GBA Plus and equity related strengths, weaknesses, gaps and opportunities. Gathering information on past or existing initiatives, including gender-equity, anti-racism, anti-oppression, accessibility, truth and reconciliation, etc. and examining best practices and disaggregated data is a part of the overall assessment.	**Don't ignore organizational strengths, weaknesses, gaps and opportunities.** Implementing a GBA Plus framework requires honest and open discussions with organizational leadership, management, staff, and clients/service-users about equity, accessibility, anti-racism, anti- oppression, truth and reconciliation, etc. within the organization.
Do use training and tools to develop GBA Plus organizational capacity and mainstream processes designed to promote equity. Simple tools like guides, manuals, and checklists can strengthen GBA Plus application across the organization.	**Don't assume all staff and management to have the same knowledge, experience, and perspectives on GBA Plus and other strategies to build equity.** Training and tools can establish baseline practices and knowledge for the organization.
Do test a GBA Plus "pilot" initiative! Identifying an existing or upcoming initiative to use as a "pilot" can make the GBA Plus implementation process concrete and gather important data for future reference.	**Don't expect GBA Plus to happen without adequate resources and support!** This includes adequate time, financial resources, training and support, collaboration, as well as allowing people to learn from mistakes.
Do develop a policy statement, or statement of intent which clearly articulates a commitment to GBA Plus or EDI, ARAO, etc. This policy should also provide a mandate to proceed with building structures, policies, and activities to support equity across the organization.	**Don't underestimate the significance of a clearly articulated policy which affirms and communicates commitments to equity, GBA Plus, or ARAO, etc.** This should be communicated and accessible to staff and leadership, as well as community partners, funders, and other groups.
Do ongoing monitoring of GBA Plus progress - both successes and failures! Capture data and information or generate disaggregated data using a GBA Plus lens.	**Don't miss out on documenting your efforts!** This is important institutional knowledge and will help to establish a record of valuable information which can be used in funding applications, employee onboarding, shifting organizational culture, etc..

Key Takeaways:

- GBA Plus is an analytical tool that can be adapted to fit different contexts; it is not a single "formula' or 'recipe."

- Programs and services designed with a GBA Plus analysis should:
  - **Apply an intersectional** approach to all aspects of the development, delivery and evaluation;
  - Seek to **remove barriers**, and **challenge assumptions** and biases;
  - **Use data**, including disaggregated data, and/or **collect evidence and feedback**;
  - Demonstrate **diversity**, **equity**, **inclusion**, **accessibility** and **authentic connections** to the communities and clients it aims to serve;
  - Engage in **respectful and meaningful consultation and/or outreach** with specific equity-seeking communities or individuals, particularly for Indigenous communities or people living with disabilities;
  - Use **gender-inclusive language**.

Questions or comments?

Visit the Enhancing National Sector Gender-Based Analysis Plus Capacity program page on OCASI's website.

GBA Plus and IDEA:
Complementary frameworks in action

Land Acknowledgement

We acknowledge that this presentation takes place across Turtle Island, which are the traditional lands of Indigenous Peoples. The land that we now call Canada, from coast-to-coast-to-coast, has been stewarded by Indigenous Peoples since time immemorial and as we gather today, we pay respect and gratitude to the traditional caretakers and guardians of the land. These lands are either subject to First Nations self-government under modern treaty, unceded and un-surrendered territories, or traditional territories from which First Nations, Métis, and Inuit Peoples have been displaced.

This presentation was developed as part of the Enhancing National Sector Gender-Based Analysis Plus (GBA Plus) Capacity Project

The objective of the Enhancing National Sector Gender-Based Analysis Plus (GBA Plus) Capacity Project is to test an approach to enhance the capacity of the funded recipients to mainstream gender equality and Gender-based Analysis Plus (GBA Plus) within their own organizations, using a collective impact model, and to develop settlement sector guidance drawing on that experience.

AMSSA's role in the project is developing and piloting resources for newcomer-serving agencies to strengthen their internal GBA Plus capacity, with an emphasis on equity in data management.

Grounded Engagement

Objectives
- Increase understanding of GBA Plus and its relationship to equity
- Enhance confidence in applying GBA Plus and IDEA to active work
- Generate takeaways to carry over into practice

Agenda

1. Overview of GBA Plus and IDEA
2. Introduction to complementary frameworks model
3. Case study
4. Workshop: Applying GBA Plus and IDEA

Principles
- There are no experts here
- We desire understanding and growth
- We are open
- We speak for ourselves
- We respect experience

What is GBA Plus?

An analytical framework that was…

- …originally focused on gender only. The Plus stands in for all the other identity factors that need to be considered.

Avoid an additive model where gender is always first and foremost by using…

- **…intersectional analysis** to see how identity factors like age, gender, race, education, and other factors interact to affect the ways policies, programs, and practices affect diverse groups of people. This helps you to…

- …design new policies and/or adapt existing ones to strategically meet the needs of a diverse client base.

Remember that analysis only happens when there is data to analyze.

- To engage in intersectional analysis, you need intersectional data.

- That means data you can **disaggregate** by separating it out and reorganizing it according to identity factors.
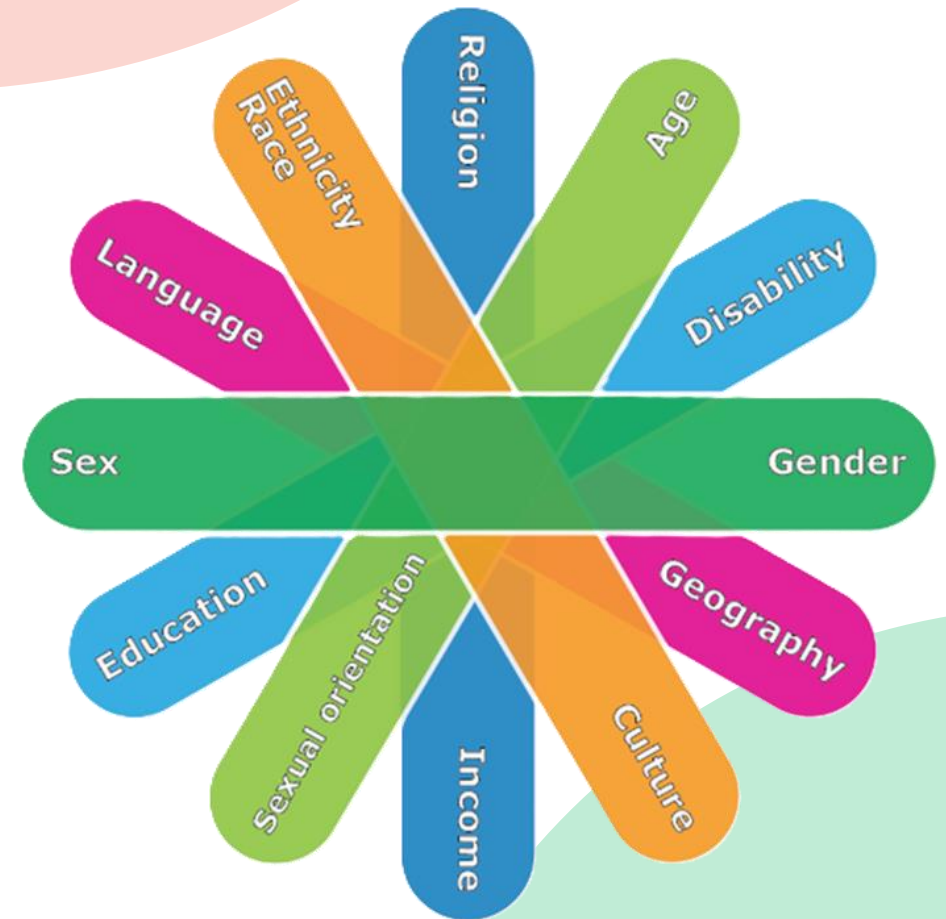
Example equity framework: IDEA

IDEA (Inclusion, Diversity, Equity, and Accessibility) is a set of principles that guide the development and implementation of programs, policies, and practices to ensure they are inclusive, welcoming, equitable, and accessible to everyone.

- **Inclusion** ensures everybody is valued and respected for their uniqueness and that they feel welcome and included.

- **Diversity** values the unique dimensions of identity, background, and experience that individuals bring with them.

- **Equity** requires breaking down systemic barriers to create opportunities for all individuals.

- **Accessibility** is the practice of identifying, preventing, and eliminating barriers, especially those exacerbated by disabilities.

Other equity frameworks include Anti-Racism Anti-Oppression (ARAO) and Liberatory Design, as well as de-colonial and anti-colonial approaches.

What equity framework(s) are in place at your organization?

GBA Plus and IDEA are complementary, not competing

GBA PLUS IS ABOUT *IDENTIFYING* AND *UNDERSTANDING.*

It is used to:

- Identify access and equity issues and barriers;

- Examine their causes;

- Inform the creation of interventions; and

- Evaluate interventions.

GBA Plus is a form of analysis, so it only works when there is data to examine. It uses that data to find and demonstrate inequities in services and programs.

IDEA IS ABOUT *ACTION* AND *RESPONSIBILITY.*

It is used to:

- Guide the development of programs and policies that promote inclusion, diversity, equity and accessibility;

- Enact programs and policies in a fair and just way; and

- Design accountability.

IDEA is a practical approach to furthering principled programs, policies, and services. It benefits from a solid grounding in evidence to guide interventions.

GBA Plus informs the interventions that IDEA designs and implements.

GBA Plus in Practice: LINC withdrawals

Identify the issue: Withdrawal rates from LINC classes

Challenge assumptions: Look at your data to see _who_ is withdrawing

Research and consult: Is there research on the specific client groups identified above?

Develop options & make recommendations: What would be the most effective interventions for those client groups, based on the results of your analysis and inquiry?

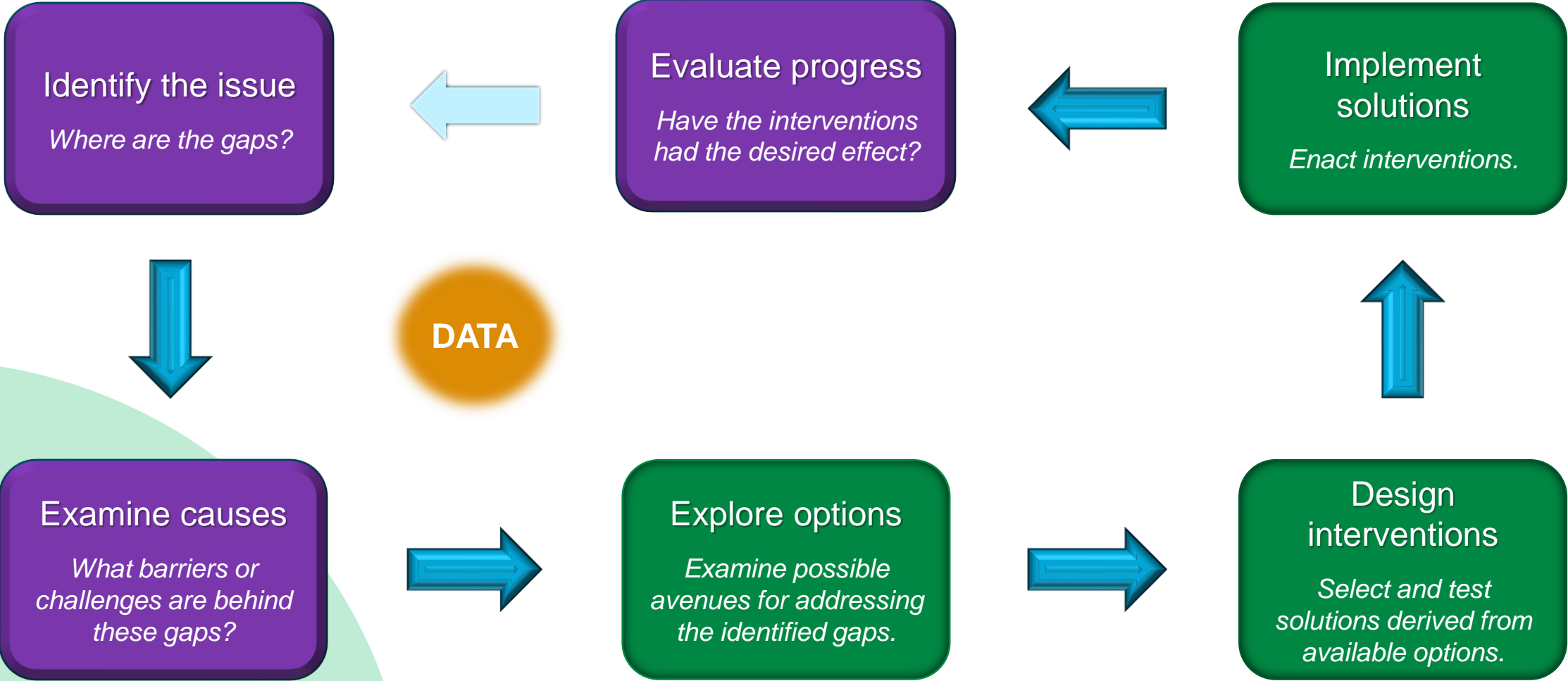**This is the stage where equity frameworks play the biggest role.**

Monitor & evaluate: Check the numbers for changes to determine success

COMMUNICATE

IDENTIFY ISSUE

CHALLENGE ASSUMPTIONS

GATHER THE FACTS—RESEARCH AND CONSULT

DEVELOP OPTIONS & MAKE RECOMMENDATIONS

MONITOR & EVALUATE

DOCUMENT

EXCELLENT RESULTS FOR DIVERSE CANADIANS

Graphic drawn from _Women and Gender Equality Canada's Introduction to GBA Plus online course_

https://women-gender-equality.canada.ca/gbaplus-course-cours-acsplus/eng/mod03/mod03_03_02.html

Complementary frameworks model: **GBA Plus** and **IDEA**

Identify the issue

Where are the gaps?

Evaluate progress

Have the interventions had the desired effect?

Implement solutions

Enact interventions.

DATA

Examine causes

What barriers or challenges are behind these gaps?

Explore options

Examine possible avenues for addressing the identified gaps.

Design interventions

Select and test solutions derived from available options.

Complementary frameworks: Case study

An organization decides to find out if all clients who want to develop their language skills are able to access and benefit from LINC classes.

They need to know:

- When, where, and how classes are offered;

- How many clients are accessing LINC;

- How many clients take a language assessment but do not take LINC classes;

- How many clients begin LINC classes but stop attending; and

- What these clients have in common.

This process requires both **usage statistics**, to understand enrollment, continuance, and withdrawal numbers, and **disaggregated client demographic data** to understand *who* is enrolling, continuing, or withdrawing, in order to identify identity factors that may be affecting access to and success in LINC classes.

Complementary frameworks in practice:
*Using **GBA Plus** to understand the issues*

Identify the issue
Where are the gaps?

- Investigating LINC enrollment, uptake, and completion requires examining student data.

- That data needs to be *comparable* and *complete.*

- This examination finds that some client groups are more likely to withdraw from classes instead of finishing them:

  - Many trans clients begin classes but do not finish them.

  - Parents with school-age children tend to withdraw from classes during the summer.
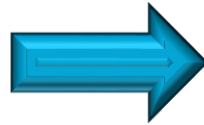
Examine causes
What barriers or challenges are behind these gaps?

- Identifying the gap shows *where* the problem is, but not *what* is causing these challenges.

- Engaging directly with clients provides needed context.

- Engagement shows that:

  - Trans clients describe experiencing discrimination from both instructors and fellow students.

  - Parents struggle to secure childcare that would allow them to attend classes when their children are not in school.

Complementary frameworks in practice:
*Using **IDEA** to create interventions*

Explore options
Examine possible avenues for addressing the identified gaps.

- These two client groups have different barriers, so interventions intended to reduce barriers will need to take into account their respective needs.

- Engage with clients for their insights on what best addresses their needs.

- Examine what successful intervention looks like.

- Establish spaces where diverse viewpoints (staff and client) are valued.

- Consider how interventions may impact other population groups, positively or negatively.
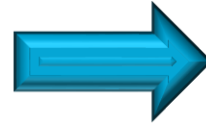
Design interventions
Select and test solutions derived from available options.

- Consider available resources and how they can be used equitably.

- Involve diverse staff and client perspectives as much as possible.

- Account for barriers that may impact clients with varying physical, sensory, or other needs.

- Address ways that program changes may affect other client groups.

- Incorporate client perspectives in creating accountability measures.

Complementary frameworks in practice:
Using IDEA and GBA Plus to enact and evaluate interventions

Implement solutions

Enact interventions.

Evaluate progress

Have the interventions had the desired effect?
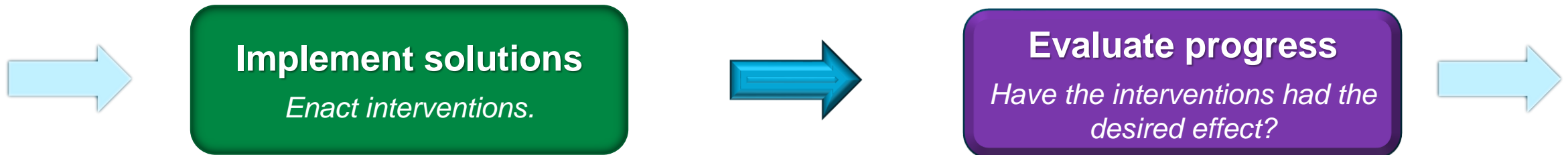
- Ensure processes align with IDEA principles.

- Establish mechanisms for anonymous feedback on process and progress.

- Maintain transparency and open communication with clients throughout process.

- Build in flexibility so interventions can be adjusted to address changing context.

Return to GBA Plus analysis to examine the effectiveness of interventions.

- Use disaggregated data to quantify progress.

- Engage with client groups to understand how the interventions have affected their experience with the program.

- Revisit intervention design as needed, based on evolving understanding.

Break!

Take 5 minutes

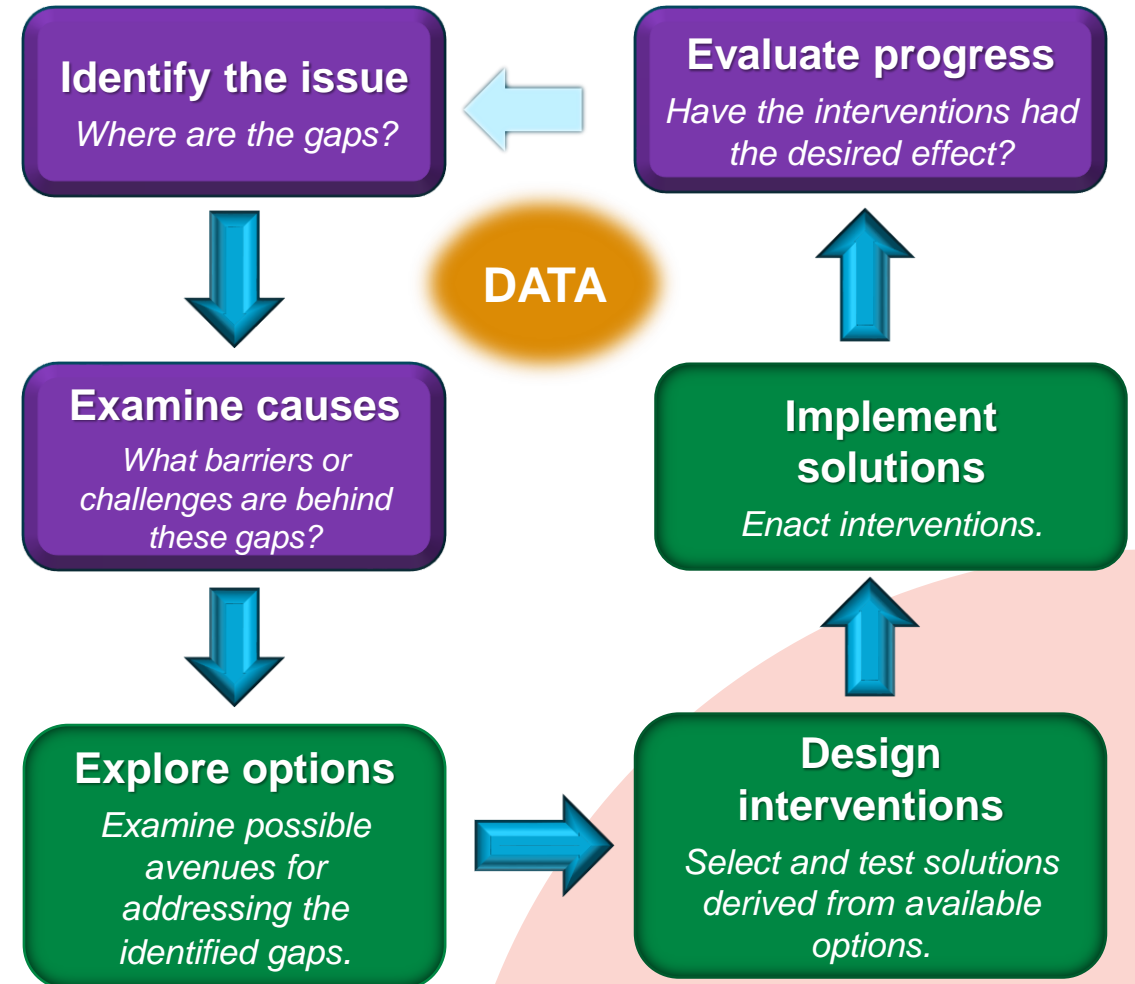Return ready to discuss and explore complementary frameworks

Complementary frameworks in practice:
*Explore **GBA Plus** and **IDEA** within the context of your work*

GBA Plus is the analysis that identifies where gaps are, who is being affected, who might be going unheard, and what barriers or challenges are at work. It is a directive to critically examine the work.

IDEA is a commitment to principled action – does this program or intervention further equity? Protect or increase diversity? Foster inclusion? Improve accessibility? How could it better enact those principles?

In your groups, explore these questions:

- What are gaps you have identified in your department or program?
- What questions do you have about these gaps?
- What data do you need to answer those questions?
- How might those answers inform and shape program design and/or intervention?

Identify the issue
Where are the gaps?

Evaluate progress
Have the interventions had the desired effect?

DATA

Examine causes
What barriers or challenges are behind these gaps?

Implement solutions
Enact interventions.

Explore options
Examine possible avenues for addressing the identified gaps.

Design interventions
Select and test solutions derived from available options.

Reflection

Did you find the complementary frameworks model helpful?

How did using the model affect how you think about or approach equity in your work?

Where do you want to incorporate more intentional use of GBA Plus and IDEA?

How confident do you feel about bringing GBA Plus to your equity work?

What support and resources would be most helpful to expand GBA Plus and equity capacity in your work?

Thank you for attending and sharing your thoughts!

Workshop: GBA Plus and Equity Frameworks

Purpose

This workshop is designed to increase understanding of the relationship between GBA Plus and equity frameworks, using IDEA (Inclusion, Diversity, Equity, and Accessibility) as the core example. It is intended to increase both knowledge and confidence in applying both GBA Plus and IDEA to the work in which participants are engaged. To that end, it provides a conceptual grounding in GBA Plus and intersectionality as well as IDEA, and lays out a model demonstrating their complementary nature. It employs a case study to show how these frameworks work together to further equitable program and policy solutions and then invites participants to apply the complementary frameworks model to their own work.

While this workshop uses IDEA as the example equity framework, GBA Plus interacts in similar ways with other frameworks, such as ARAO (Anti-Racism Anti-Oppression), Liberatory Design, and decolonial/anti-colonial approaches. Facilitators may substitute the equity framework in active use at their organization by replacing Slide 6 and editing subsequent slides, or may use the workshop time to encourage participants to apply the IDEA-based lesson to a framework that better represents the organization's work or values.

Outline

Speaking notes for each slide are provided alongside the relevant slide, in the "Notes" section of the deck.

This workshop is expected to take 1-1.5 hours. The listed times are estimates; based on where your organization is currently at in the GBA Plus and equity process and your assessment of the knowledge base held by participants, explanatory slides may require additional depth. Alternately, some of the concepts may already be familiar, and more time can be allocated to the workshop portion.

Topic & Objectives	Slides	Estimated Time
Welcome and Housekeeping	1	1 min
Territorial & Funder Acknowledgments	2-3	1 min
Grounded Engagement: Objectives, Agenda, Grounding Principles *Use this slide to discuss workshop logistics and methods for engagement. Encourage the use of notepads or sticky notes for in person facilitation and the chat or Q&A functions for virtual facilitation. Ensure there is active recording of thoughts destined for the parking lot – it can be very helpful to follow up after the workshop with acknowledgment of the ideas that arose from it.*	4	2 min
Overview: GBA Plus & IDEA as complementary frameworks *Introduce and define GBA Plus and IDEA. Focus on building understanding of intersectionality and its importance to equity, as it is a key throughline connecting GBA Plus and equity frameworks.* *Pause on slide 6 for participants to describe equity framework(s) in use at their organization and how it manifests.*	5-6	5 min

Model: Complementary Frameworks *Use the concept of intersectionality to guide an overview of how GBA Plus works with equity frameworks to produce more equitable programs and policies through the flowchart in this slide.* *Pause on Slide 8 to allow participants to ask questions about GBA Plus.*	7-9	6 min
Example/case study: *Pause to solicit suggestions before revealing slide contents (click-to continue animation is included in the slides).* *On slide 13, you may pause for questions about the case study.*	10-13	10 min
Break: *Take a 5-10 minute break before diving in to the workshop portion.*	13	5-10 min
Workshop: Applying complementary frameworks (GBA Plus & IDEA) to current work *Encourage groups to record their thoughts and to place ideas that diverge or go beyond the scope of this workshop into the parking lot. Consider preparing a list of potential or identified gaps currently facing the organization to share with groups. You can offer an option from the list to groups who are struggling to come up with their own, assign a gap to each group, or just offer the list to all and allow each group to select a gap. It's okay for more than one group to explore the same gap – they may come up with very different answers.*	14	2 min to introduce 10-15 min for small groups 10-15 min to share back
Reflection *Consider using the nonverbal participation suggestions below to support engagement. Record feedback and thoughts; consider sharing insights in a follow-up email.*	15	10 min
Conclusion, thanks, farewell *You may add or substitute a slide with a link or QR code for participants to evaluate the workshop and provide feedback.*	16	1 min

Tips for facilitation

Part of employing IDEA or other equity frameworks is considering accessibility. Is the (physical or virtual) venue for the workshop accessible to folks with a variety of physical, mental, or sensory needs? Is it in a space that is welcoming to people of all identities? Are there mechanisms encouraging accommodations for those with needs not being met? Does it have loud or especially bright lights that could contribute to sensory overload?

Sensory and psychological needs

While the content of this workshop is intended to support psychological and cultural safety, even in the most carefully cultivated environment individuals may need to retreat to care for their own well-being. A variety of causes may lead to this need, so ensure participants have access to a quiet space to care for themselves. Include directions for accessing this space, and the value of self-care, when discussing the Grounded Engagement slide (4).

Anonymous participation

Not all participants will always be comfortable speaking up. Encourage the use of sticky notes to record thoughts for in-person workshops and the chat/Q&A functions for virtual ones.
For in-person workshops, consider periodically collecting sticky notes with questions on them, or encouraging participants to put their written questions on a dedicated surface, such as a poster sheet or section of the wall. Check those notes for questions and insights that can be shared with the group.
For virtual workshops, consider having a designated assistant who can receive and read direct messages from participants, and/or make sure the Q&A function allows for anonymous submissions.

Nonverbal participation

As an alternative to expecting participants to speak up, consider using nonverbal check-ins. A show of hands – up for agreement, down for disagreement, flat for neutrality – or using fingers to rate a statement from one to five can help to engage and include participants who are uncomfortable speaking up.
Example: Ask participants to raise their hands if they feel they understand a concept; those who are unsure can hold their hands out horizontally instead of raising them vertically.
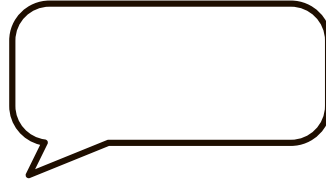
Agree:

Unsure:

Example: Ask participants to rate their confidence employing a new concept or skill from one (not at all confident) to five (very confident) by holding up that many fingers.

GBA Plus and Equity Frameworks Workshop: Slide Notes

Slide 1: n/a

Slide 2: [Replace with the territorial acknowledgment used by your organization.]

Slide 3: n/a

Slide 4:
[Speaker may include 1-2 goals you have for participants][Principles may be modified to reflect those used at your organization]

Practices
- Periodic pauses for questions
- Parking lot for tangential questions

Logistics
- Encourage use of sticky notes (in-person) or chat/Q&A function (virtual) for folks to record their thoughts.

Slide 5:
- Gender-based analysis plus (GBA Plus) is an analytical framework for examining how diverse groups access, experience, and benefit from policies, programs, and practices.
- Initially, as gender-based analysis, it only examined the role gender played in equity. While it now acknowledges other identity factors through the "Plus" in "GBA Plus", it is important to be intentional about examining diverse factors and to move away from an additive model where gender is the first and foremost unit of analysis.
- To do so, engage in intersectional analysis to see how identity factors like age, gender, race, education, and other factors interact to affect the ways policies, programs, and practices affect diverse groups of people.

- This analysis is then used to design new policies and/or adjust existing ones in order to ensure equity in access and outcomes.
- Remember: analysis requires data to analyze. To perform intersectional analysis, you need intersectional data – in this case, disaggregated data.

Slide 6:
[Speaker may choose to replace this slide with an equivalent slide providing an overview of the equity framework in use at their organization. If so, simply mention IDEA in the list of other frameworks here.]

Note that accessibility includes universal design as well as accommodations. It should be proactive, not just reactive, because reactivity places a heavier burden on those needing accommodations.

[Pause on this slide to check in with participants about the equity frameworks at their agencies. Consider follow-up questions about how that framework manifests in the context of their organization.]

Slide 7:
[If replacing IDEA with the framework at your organization, update this slide to match.]

Intersectionality plays a key role in both GBA Plus and IDEA. Identity factors (including, but not limited to, age, race, and gender) intersect and interact to create unique dimensions that can't be clearly seen when looking at factors in isolation.

Use GBA Plus to gain a deeper understanding of how those intersections apply to your clients, and IDEA to guide how you use that knowledge to design services that are better able to meet their needs. Remember that equity is not about everyone receiving the same service; it's about everyone receiving the services they need to thrive.

[Pause on this slide – ask about the role data/analysis plays in their program design and/or evaluation.]

Slide 8:
For instance, you might notice higher rates of withdrawal from LINC classes during the summer months. Identify this as the issue.

Look at the data you have to challenge the assumptions you might carry – who do you assume is withdrawing and why? Use that disaggregated data to find out who is leaving classes.

Then gather the facts – consult with those clients to find out why they're withdrawing. Use that information to develop possible interventions, using an equity framework such as IDEA to ensure that these interventions are designed and implemented in an equitable way.

Finally, check to see how effective these interventions are. Do your withdrawal numbers change?

Slide 9:
This chart is a more focused illustration of the relationship between GBA Plus and IDEA. It shows how the knowledge that comes from GBA Plus analysis provides a foundation for equity-driven interventions (such as program design or changes) and then helps to evaluate those interventions.

The role played by GBA Plus is particularly important for demonstrating to stakeholders, including funders, both the reasons for interventions and their successes. GBA Plus analysis enables you to build a story using your data as proof, allowing you to pinpoint gaps and address them strategically. All of these steps depend on strong data practices to construct an accurate picture for your foundation.

Transition: Next, we'll go through each of these steps in more detail using an example to help us see these linkages more clearly.

Slide 10:
[Pause to ask participants for their ideas about what the organization needs to know before clicking to trigger the animation. You may choose to substitute an intervention created or in process at your organization.]

Remember that disaggregated data can be broken down by demographic factors, like age and gender (among many others). Disaggregation is the most essential tool for a quantitative understanding of how different groups access and experience services. Lack of access to disaggregated data is a common bottleneck for GBA Plus integration.

Slide 11:

[Use click-through animations to move through the content, allowing participants to volunteer insights. If using an example from your organization as the case study, update this slide to match.]

Transition: Start by identifying the issue and finding gaps.

For data to be comparable, it needs to use the same labels and categories. For example, data on age should use the same breakdown, such as by decade (15-24, 25-35, etc). Completeness simply means that data is easier to use when there are no missing pieces. Finding patterns based on gender, immigration status, or other factors is harder (and more prone to errors), if not all client records have that information.

This step helps you identify specific areas for engagement, avoiding asking all clients to complete a survey just to find which groups to then follow up with.

Transition: Next, examine causes behind those gaps. Client engagement can be done formally in focus groups, open-ended surveys, and informally via conversations between settlement workers or teachers and their clients. Engagement benefits from relationship-building to ensure clients feel safe being honest about the challenges they're facing, which is especially true for multiply –marginalized folks. The trans clients described here may not all be out, and may be less comfortable disclosing their experiences with discrimination (especially discrimination coming from staff/instructors) than parents who are facing a logistical barrier.

Slide 12:

[Use click-through animations to create opportunities for participants to volunteer insights. If you are using an example tailored to your organization, update this slide to match.]

Transition: After you've built an understanding of where the gaps are and what causes them, explore options for interventions that address the gaps identified in the previous steps.
Transition: Once you've collected some ideas for interventions, think through what those interventions should look like to best support equity.
- Potential interventions to support trans students may entail actions like training for instructors and/or offering classes in affirming spaces.

- Possible interventions to support parents may encompass additional support with finding appropriate childcare, subsidies to help with childcare costs, offering on-site childcare, and/or in-home tutoring.

Slide 13:
 [Use click-through animations to create opportunities for participants to volunteer insights.]

Transition: Now is when you take the interventions you've designed and put them into practice.

Implementation is the stage where ideas meet reality. This is the point where commitment to IDEA may get challenged. Build in ways for staff and clients to give feedback on how well things are working, and make sure you've built in some flexibility to adjust changes over time.

Transition: Finally, shift your focus back to GBA Plus analysis.

This is where you evaluate the interventions. Update disaggregated data to compare pre- and post-intervention data. Keep lines of communication and engagement open – conducting the previous stages of the process with care helps build relationships that continue to grow and inform the work over time.

This phase highlights the cyclical nature of the process – from your evaluation, you may find different gaps, which allows you to revisit the other phases of the joined frameworks. Or you may find that the interventions were not as successful as was hoped and need to be adjusted. But now you have a baseline and a way to track the progress, making the process smoother and more effective each time.

Slide 14: Take 5-10 minutes for everyone to reflect, stretch, and take care of needs.

Slide 15:
[Keep this slide up for participants to refer to during their group discussions.]

Give participants 10 minutes to discuss the questions in pairs or small groups.

Bring everyone back together and take 10 minutes for groups to share their thoughts. Record insights and consider sharing them to participants in follow-up communication after the workshop.

Engagement:
In-person: Encourage groups to jot down their ideas and answers. Circulate to provide support and redirect diverging thoughts to the parking lot.

Virtual: Provide breakout rooms for discussion. Invite participants to note ideas in the chat and to direct message facilitator(s) if they get stuck.

Slide 16:
Engagement: On this slide, insert a link and/or QR code for participants to evaluate the workshop and provide their own feedback.

Give participants a chance to reflect on their own or in pairs/groups. You can offer all the questions at once, or separate them and consider each question separately. For the first and fourth questions, consider starting them with a nonverbal chance to give feedback. In-person: a show of hands for yes (up)/no (down)/somewhat (flat), or raised fingers to rate from 1 to 5.

Virtual options: Using the raise hand function for agreement, encourage posting in the chat, consider using Zoom polls, Slido, or Mentimeter.

- Consider posting the workshop objectives in the chat and encouraging participants to reflect on how well the workshop experience met those objectives.
- Consider using follow-up questions, like "What aspect of (GBA Plus or IDEA) do you feel most (or least) confident about? Why?"
- Consider following up on comprehension through questions like: "What are your take-aways about the relationship between GBA Plus and IDEA?"

Slide 17:
[Offer closing thoughts and thank organizers here. Consider including ways for participants to follow up with questions and thoughts that arise after the workshop.]

Workshop follow-up suggestion: Assemble ideas and insights from participants into a document that can be shared alongside a copy of this presentation. Include a section for the ideas and questions that were placed in the parking lot during the workshop.

GBA Plus Mastery: Advancing Equity in Francophone Immigration Services

*This course will only be offered in French.
Course available on Le Labo **here. Please make an account for access.

This comprehensive, multi-level online training program equips professionals with the knowledge and skills to implement Gender-Based Analysis Plus (GBA Plus) effectively in Francophone immigration and settlement services. Hosted on the FCFA's LMS Platform Le Labo, it consists of three interconnected courses:

1. "Demystifying GBA Plus: Foundations for Inclusive Settlement Services" (Beginner)
2. "ACS Plus: From Theory to Practice" (Intermediate)
3. "Operationalizing GBA Plus in Francophone Immigration Services" (Intermediate)

The program covers fundamental concepts, implementation challenges, and practical applications through interactive exercises, real-world scenarios, and case studies. Upon completion, participants will understand GBA Plus principles, recognize personal biases, apply GBA Plus in daily work, and develop strategies for organizational change.

Content Warning: Content warnings for sensitive topics related to gender, sexuality, and systemic discrimination are included.

GBA PLUS: SELF-LEARNING AND GROUP ACTIVITIES FOR INCLUSIVE PROGRAMMING

TABLE OF CONTENTS

— PURPOSE

This tool aims to enhance the understanding of intersectionality and how we can apply intersectionality to support groups with unique vulnerabilities. These activities facilitate better application of GBA Plus principles within organizational staff, fostering a deeper and more practical comprehension through individual or small team engagement.

TWO OF THE ACTIVITIES THAT SUPPORT YOUR LEARNING ARE:

1 The **Intersectionality Reflection** activity involves watching Kimberlé Crenshaw's "The Urgency of Intersectionality" video. This prompts readers to consider systemic barriers affecting newcomer and immigrant populations, followed by reflection questions.

2 Applying a **GBA Plus Lens** activity requires watching a video about a client's story and reflecting on strategies to provide quality and inclusive services.

INTERSECTIONALITY REFLECTION ACTIVITY

Total estimated time: 45 minutes

—
INTERSECTIONALITY REFLECTION ACTIVITY

Intersectionality Reflection Exercise

WATCH THE "THE URGENCY OF INTERSECTIONALITY" **VIDEO**.

Please note: the video is about 19 minutes long and has an option to watch with French subtitles.

Kimberlé Crenshaw,
American Civil Rights Advocate

AFTER WATCHING THE VIDEO, PLEASE TAKE A MOMENT TO THINK ABOUT THE FOLLOWING QUESTIONS:

What are the similarities between the Canadian context and the American context that Crenshaw discussed?

What other groups of people in Canada experience the marginalization that Crenshaw discussed?

What ideas or experiences from the video can you apply to the newcomer/immigrant and migrant population you serve?

Within your role at your organization, how do you consider the effects of systemic barriers when planning and delivering your programs and services?

A systemic barrier refers to a structure, policy, practice, or situation that, whether on purpose or by accident, puts certain groups of people at a disadvantage because of certain factors of their identity. For example, newcomers may not find affordable housing because of systemic barriers such as discrimination, language difficulties, or a lack of Canadian credit history or references.

Can you identify any systemic barriers that might be affecting who can access the programs you offer? (for example, are there certain groups of people that seem less likely to use your services?

APPLYING A GBA PLUS LENS ACTIVITY
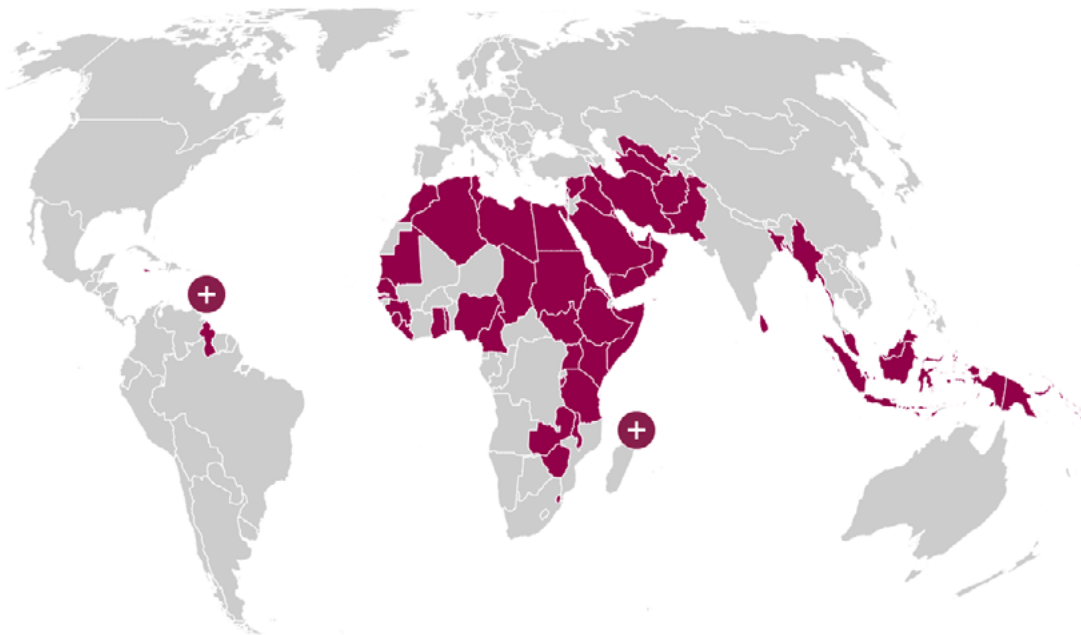
Total estimated time: 30 minutes

APPLYING A GBA PLUS LENS ACTIVITY

PLEASE WATCH THIS **ONE MINUTE VIDEO** CREATED THROUGH THE **POSITIVE SPACES** INITIATIVE.

PLEASE LOOK THROUGH THIS INTERACTIVE MAP FROM **HUMAN DIGNITY TRUST**.

APPLYING YOUR EXISTING KNOWLEDGE OF GBA PLUS, PLEASE REFLECT ON THE FOLLOWING AFTER WATCHING THE VIDEO AND EXPLORING THE INTERACTIVE MAP:

Reflection Exercise Questions

What strategies can you use to ensure that you are providing high-quality, safe, and accessible services without letting personal bias interfere with the service that you are providing?

> Think about clients you may have had from some parts of the world where they cannot express their sexual identity or sexuality.

How can clients feel safe and celebrated in a new country?

What other intersecting factors could be considered in designing a program or intervention for Chris?

> Think of the resources Chris (from the video) does and doesn't have access to.

What training would be beneficial for service delivery providers to ensure they are aware and responsive to the needs of diverse people?

SEASONOVA GBA Plus Courses

Course #1: An Introduction to Gender-Based Analysis (GBA) Plus
Course #2: Organizational Capacity Building Through a GBA Plus Lens

Audience Frontline workers, middle- and upper- management, and board directors of newcomer-serving agencies.
Duration: Approximately 2 hours each including worksheets and quizzes.

Course #1 is an introductory level course that provides a general overview of what GBA Plus is in the context of providing services and supports to newcomers, immigrants, and refugees in Canada.
Course #2 explores the benefits of implementing GBA Plus in organizational policies, procedures, and practices for both the workplace and its clients.

These courses were developed in partnership with SEASONOVA, a BIPOC-, female-, and immigrant-led social enterprise offering consulting services in facilitation, adult education, strategic planning, and intersectionality analysis.

*Please note this course will be offered by AAISA at minimum once a year and may be available at other times with enough interest. Questions about registration through AAISA can be sent to pd@aaisa.ca

TIPS FOR Drafting Indigenous Engagement Strategies and Working With Survivors

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Drafting an Indigenous Outreach and Engagement Strategy

Many newcomer serving organizations work with Indigenous peoples to advance Truth and Reconciliation and educate staff and clients on Indigenous cultures as well as the legacy of colonization in Canada.

An Indigenous Outreach and Engagement Strategy that is co-created with Indigenous peoples can help to guide your work and ensure a shared vision and goals. An important first step is to research the Indigenous peoples whose traditional lands are part of or near your local area. You can do this by exploring your region on the map at www.native-land.ca.

A Strategy can help you to clearly plan how your goals and objectives for Indigenous engagement connect to other internal documents, like your strategic plan and terms of reference for working groups. It is a best practice for your Indigenous Engagement and/or Outreach Strategy (as well as its component parts, like a land acknowledgment) to be created in extensive consultation with Indigenous peoples, leaders, and/or their representative bodies. In Canada, this might look like working with:

- Local First Nation(s), Inuit and Métis communities
- National Center for Truth and Reconciliation
- Elders and Knowledge Keepers
- Provincial Treaty Commission offices
- Groups dedicated to advancing Reconciliation at the municipal level
- Indigenous researchers and instructors at a university or other post-secondary institution, including the First Nations University of Canada and Gabriel Dumont Institute

- Staff and volunteers at a cultural and/or historic site that educates the public on Indigenous peoples. Some examples include (but are not limited to):
    - Nisga'a Museum in British Columbia
    - Head-Smashed-In Buffalo Jump UNESCO World Heritage Site in Alberta
    - Batoche National Historic Site in Saskatchewan
    - Winnipeg Art Gallery-Quamajuq in Manitoba
    - Woodland Cultural Center in Ontario
    - Kouchibouguac National Park in New Brunswick
    - Millbrook Cultural and Heritage Centre in Nova Scotia
    - Lennox Island Mi'kmaq Culture Centre in Prince Edward Island
    - Illusuak Cultural Center in Newfoundland and Labrador
    - Kwanlin Dün Cultural Centre in Yukon
    - Legends of the Aurora interpretive tour in the Northwest Territories
    - Nunatta Sunakkutaangit Museum in Nunavut

When working with Indigenous groups, it is important to co-create objectives, content and deadlines and be mindful of capacity. Many Indigenous communities and groups are approached constantly with requests to share their time, teachings and cultures. Taking the time to check in frequently with project partners will ensure that everyone remains on the same page and that expectations for deliverables remain reasonable. Additionally, it is helpful when drafting an Indigenous Engagement Strategy to think of the Strategy as a living document. Your Strategy will never be completed or finished, but rather continually added to and changed to reflect new information as it becomes available, the needs of the communities you're working with and emergent best practices.

Taking Care of Mental Health

When working with Survivors (for example, Survivors of Residential Schools and the Sixties Scoop), it is important to be mindful when asking people to educate others by sharing personal stories. Re-living these experiences and discussing them in public may (re)-trigger trauma. Before reaching out to ask a Survivor to speak at an event or share their story as part of a project, conduct research and put supports in place to ensure your organization is operating from a **trauma-informed perspective.** The Canadian Medical Association and Public Health Agency of Canada offer the resources and supports linked below:

Trauma-Informed Engagement and Resources: CMA Patient Voice Guide: Trauma Informed Engagement & Resources

Trauma- and violence-informed approaches to policy and practice: <u>Trauma and violence-informed approaches to policy and practice - Canada.ca</u>

Many Indigenous groups and cultural organizations have **Speakers' Bureaus** where you can connect with Indigenous people who are experienced in public speaking and more accustomed to discussing sensitive and painful life stories in educational settings.

It is a best practice when working with Residential School Survivors to have culturally sensitive mental health supports available during both the planning and delivery of an event or project. The Resolution Health Support Program was established as part of the 2006 Indian Residential School Settlement Agreement. The Program provides cultural and emotional support, as well as mental health counselling services to Survivors of Residential Schools and their families. These services are delivered by trained Resolution Health Support Workers, many of whom are Residential School Survivors themselves or impacted by the inter-generational effects of the abuse and violence perpetrated.

For more information on the Program and how to access it in your area, visit the Government of Canada website here: <u>Indian Residential Schools Resolution Health Support Program (sac-isc.gc.ca)</u>

Some provinces, including British Columbia[1], Alberta[2] and Manitoba[3], also maintain their own 24-hour Residential School Crisis Hotlines.

Other Tips for working with Survivors, Elders and Knowledge Keepers

- It is a best practice to present an offering to the person(s) you are asking to join your initiative. What constitutes a culturally appropriate offering differs across Indigenous cultures. You will need to do research to determine how to proceed in the context of your geographic area and the initiative you have planned.
- It is a best practice to offer a monetary honorarium. Different amounts are offered depending on the amount of time and energy you are asking the person to commit to your initiative. For information on current standard rates in your area, you can reach out to an Indigenous-run organization.
- It is a best practice when working with Survivors to offer funds to cover transportation costs, whether this is mileage or a reimbursement for taxi costs.
- If a meal is being served at an event, your Indigenous partner(s) should be invited to join, even if their role in your event has already concluded.

1 Government of British Columbia: <u>Supports for Residential School Survivors | HelpStartsHere (gov.bc.ca)</u>
2 Native Counseling Services of Alberta: <u>Residential School Health Support Program | NCSA</u>
3 Government of Manitoba: <u>Province of Manitoba | inr - Manitoba Indian Residential Schools (gov.mb.ca)</u>

TIPS TO USE WHEN Working With Newcomers Who are Blind or Partially Sighted

This tip sheet was created using resources and information from CNIB (Canadian National Institute for the Blind) and Vision Loss Rehabilitation Canada.

- **Introduce yourself each time you meet with someone who is blind or partially sighted.** Don't make the person guess the sound of your voice. This remains true even if you have met with them previously. Many spaces are full of competing sounds; people talking, music, traffic, etc. Introducing yourself ensures that the person you're meeting with knows who you are. It is equally important to verbally state when you are leaving a room, so that someone is not left speaking to you when you're no longer present.

- **Ask the person who is blind or partially sighted if they want your assistance before physically guiding them through a space.** You should never assume that a person who is blind or partially sighted needs a guide or touch them without being asked. You can offer to act as a sighted guide, but should respect the person's wishes if they decline your offer. For more information on acting as a sighted guide, visit the CNIB site here: Step-by-Step (cnib.ca)

- **Don't leave furniture or potted plants near doorways or in hallways, and do not put picture frames on walls at hand height.** Many Blind people will follow along the length of a doorway or wall to navigate through a space. Removing obstacles, like furniture and picture frames, makes this process easier for them and reduces the potential for injury.

Image Credit: CNIB

- **How to identify a guide dog.** There are several breeds around the world that are trained as guide dogs, but most in Canada are labrador retrievers, golden retrievers, goldendoodles, standard poodles, or German shepherds[1]. Guide or seeing-eye dogs typically wear a chest harness with a handle bearing the logo of the school where they were trained. Please see the photo below for an example.

- **When you see a guide dog in public, ignore the dog**. If a guide dog is out in public, that means the dog is working and needs to have its full attention focused on assisting its owner. It is not appropriate to pet or call out to a guide dog without the owner's permission.

- **Before meeting with a person who is blind or partially sighted, clarify their preferred format for receiving information.** People who are blind or partially sighted use different tools to help them access written information, including Braille, screen-reader technology, and large print text. While it is mainly older generations that use Braille, it is still taught in schools today so students can access information in multiple ways. Please see below for further tips on increasing the accessibility of your materials.
    - **Ensure documents and other meeting materials are accessible to those who are partially sighted.** To view a copy of CNIB's Clear Print Accessibility Guidelines, visit their site here: Clear Print Accessibility Guidelines (cnib.ca)
    - **Educate your staff and volunteers on screen-reader technology.** Many blind or partially sighted people rely on screen-reader software to access written materials. To learn about some examples of this software, visit the CNIB site here: Screen Readers | CNIB

1 Canadian Guide Dogs for the Blind: FAQ – Canadian Guide Dogs for the Blind

- **It is important to ensure that your materials are screen-reader compatible.** If documents are formatted with text inside complex graphics in a way that doesn't work well with that technology, this creates a challenge for the user. See Appendix 1 for some basic tips.

- **When sharing a meal with someone who is blind or partially sighted, describe how the food is arranged on the plate.** For instance, you can use the face of a clock as a reference – "Your salad is at four o'clock and your steak is at ten o'clock"[2].

- **Inform newcomers of the services available to people who are blind or partially sighted in Canada.** Newcomers may arrive in Canada from countries that have different perceptions of blindness, vision loss and disability. Newcomers may not know that Canada offers a range of supports and services for those who are blind or partially sighted, including many paid for by the government, non-profits and charities. These services include connecting the newcomer with devices, software and other assistive technology to support them in their daily lives.

- **Some organizations, like Vision Loss Rehabilitation Canada, will accept client referrals directly from service provider organizations (SPOs) for services and programs.** From there, the organization can work with the client to contact their family doctor and/or optometrist to get the medical information required to best support them.

- **Some organizations that provide services and supports for people with vision loss have partnerships with local SPOs that give them access to language interpreters.** If you are worried about how a community organization will communicate with an ESL- or EAL-learner client, ask if they already have access to interpretation services.

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2 Canadian National Institute for the Blind (CNIB), 4 Common Courtesies to Offer People Who Are Blind: Be Natural! 4 Common Courtesies to Offer People Who Are Blind | CNIB

- **Only one third of Canadian working age adults with sight loss are employed, with half struggling to make ends meet at $20,000 a year or less**[3]. Many organizations that offer services for those with vision loss have career and employment support programs. Programs assist clients with tasks like resume-building, navigating the disclosure of one's sight loss to an employer or potential employer, and finding the technology and resources that provide the best accommodations for them as individuals. Examples of such programs are Come to Work at CNIB[4] and Career and Employment Services[5] at Vision Loss Rehabilitation Canada. When connecting with a community organization that supports those who are blind or partially sighted, make sure to ask about employment initiatives. Some organizations even offer tools and assessments that help workplaces to determine whether they are ready to onboard an employee who is blind or partially sighted.

- **For more information on recruiting and interviewing someone who is blind or partially sighted for a job, visit the CNIB site here: Hiring Someone with Sight Loss | CNIB**

- **If you don't know what to do, Vision Loss Rehabilitation Canada recommends introducing yourself and then asking a person with vision loss "Is there anything I can do to help you?"** Framing an offer of help in this way centers the needs of the person with vision loss while also giving them the option to preserve their independence by declining your offer.

- **The Immigrant Services Association of Nova Scotia (ISANS) offers a Sight Loss Integration Teacher Toolkit for working with English language learners who are blind or partially sighted. To access the toolkit, please visit the ISANS website here:** Integrated Sight Loss Teacher Toolkit - Immigrant Services Association of Nova Scotia (isans.ca)

APPENDIX 1
Tips for increasing the screen-reader compatibility of your materials
1. Avoid hand-written text and thin typefaces[6].
2. To keep your text legible, use sans serif fonts for body text[7].
3. Refer to the official Web Content Accessibility Guidelines when creating digital content: Web Content Accessibility Guidelines (WCAG) 2.2 (w3.org)

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3 CNIB, Career Support and Employment Program: CNIB's Career Support and Employment Program
4 For more information, visit the CNIB site here: Come to Work | CNIB - Come to Work
5 For more information, visit the Vision Loss Rehabilitation Canada site here: Specialized Services | Vision Loss Rehabilitation Canada
6 Access Smithsonian, Inclusive Digital Interactives: Best Practices and Research: Inclusive Digital Interactives Best Practices + Research
7 Ibid.

TIPS TO USE WHEN WORKING WITH
Newcomers Who Are D/deaf or Hard of Hearing

This tip sheet was created using resources and information from the Canadian Association of the Deaf, Ontario Council of Universities Accessible Campus resource, and Ontario Association of Sign Language Interpreters

- **Usage of "Deaf" vs. "deaf".** The term "Deaf" with an uppercase "D" refers to members of a distinct cultural group whose first language is Sign[1]. Some people who have complete or partial hearing loss may not identify as part of this group and may instead use the term "deaf" with a lowercase "d"[2].

- **Usage of "hard of hearing".** This term refers to "individuals who have a hearing loss ranging from mild to severe and who use their voice and residual hearing – and occasionally sign language – for communication"[3].

- **There are many different sign languages around the world.** As is true with verbal languages, sign languages vary along with the history of their country of origin and the people who sign them. In Canada, American Sign Language (ASL) and Langue des signes québécoise (LSQ) are the most common sign languages. Even in other countries where English and French are official languages, there are different and often distinct sign languages, including British Sign Language and French Sign Language.

- **At events, programs and meals, let the D/deaf person(s) decide where they want to sit.** They are the best person to address their own accessibility needs. For example, if your event employs a sign language interpreter, the D/deaf person(s) needs to sit close enough to the interpreter to see them signing. Encouraging D/deaf guests and clients to choose their own seat gives them the freedom to best meet their own communication needs.

1 Canadian Association of the Deaf, Terminology - Canadian Association of the Deaf - Association des Sourds du Canada (cad-asc.ca).
2 Ibid.
3 The Council of Ontario Universities, Accessible Campus resource. Interacting with Persons who are Deaf, Deafened or Hard of Hearing - Accessible Campus

- **Make sure the person you're communicating with knows you're there before speaking.** A D/deaf person won't hear you coming up behind them and may not know if you're in a different room. To ensure that you don't startle them, tap them on the shoulder or calmly wave in their direction before beginning a conversation[4].

- **Do not ask a friend or family member to interpret for a D/deaf person in formal service delivery settings.** It is unlikely that the friend or family member will know how to express concepts and terminology specific to the settlement sector in sign language. Additionally, the D/deaf client may feel that their right to privacy is not respected if a friend or family is interpreting for them. In professional environments, it is always best to book a trained sign language interpreter to support clients.

- **Use technology to your benefit.** Email, texting, instant messaging apps, online appointment systems, and online relay services are all tools you can use with people who are D/deaf or hard of hearing. Apps like Automatic Speech Recognition are also useful in supporting communication[5].

- **In meetings and other group settings, make sure people take turns speaking.** It is difficult for a D/deaf person to lip read and following along with the conversation if more than one person is talking. Similarly, a sign language interpreter cannot translate more than one person's speech at a time[6]. A person who is hard of hearing may have difficulty following a conversation if there are several overlapping voices.

- **When communicating with a D/deaf person, make sure you are in a well-lit area where they can clearly see your face**[6]**.** Do not put your hands over or otherwise obscure your face. In Deaf culture, facial expressions are a big part of communication. Additionally, the person may be relying on lip-reading to communicate with you.

Terminology to avoid when working with people who are D/deaf and hard of hearing
- Hearing-impaired
- Deaf-mute
- Deaf-dumb
- Many people who are part of the Deaf community do not consider themselves disabled[7]. This may vary from person to person, but it is good to be aware of when meeting someone who is D/deaf for the first time.

4 Ibid.
5 National Technical Institute for the Deaf, Center on Employment: P2128_NTID_Tips_for_Comm_with_Employees.pdf (rit.edu)
6 Ibid.
7 Journal of Deaf Studies and Deaf Education, Ethnicity, Ethics and the Deaf World: Ethnicity, Ethics, and the Deaf-World | The Journal of Deaf Studies and Deaf Education | Oxford Academic (oup.com)

TIPS TO USE WHEN WORKING WITH SIGN LANGUAGE INTERPRETERS

- **Sign language interpretation is a highly-skilled profession.** If you know that (a) D/deaf person(s) will attend a meeting or event, you need to build the cost of paying an interpreter into your budget. Travel expenses and time spent preparing for an event are also compensated.

- **The D/deaf person(s) attending your event may have an interpreter they prefer to work with,** especially if the event is taking place in their home community. Clarify with the individual(s) involved before booking an interpreter.

- **Sign language interpreters can be booked through both agencies and independent businesses.** Due to increasing demand for interpreters, their schedules often fill up quickly. It is recommended that interpreters are booked a minimum of 3 weeks in advance of your meeting or event[8].

- **Hire interpreters who are active members of the Canadian Association of Sign Language Interpreters[9] (CASLI),** who follow a Code of Ethics and Guidelines for Professional Conduct. Members of CASLI will have graduated from a recognized ASL-English Interpreter Education Program.

- **Where feasible, provide interpreters with information and documents ahead of time so they can prepare.** Agendas, opening and closing remarks, speeches, research papers, tour scripts, slide decks – these are all useful tools for an interpreter to have before they arrive at your event or meeting. Providing documentation to an interpreter a minimum of two weeks before your event ensures they have time to read the materials.

- **If a meeting or event is longer than two hours, you will need to book more than one interpreter.** Interpreting is hard work, and it is important to build capacity into your event for interpreters to take breaks.

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8 Ontario Council of Sign Language Interpreters.
9 For more information, visit the CASLI website: CASLI - Why Hire a CASLI Member

- **If a meeting or event relies on highly technical or niche language, ensure that is noted at the time of booking.** Some interpreters will be a better fit than others when interpreting, for example, at a software conference or Shakespearean play. Providing this information ahead of time ensures that the best person is matched with your event.

- **When working with a sign language interpreter, make sure that you look at and address the person you are communicating with and not the interpreter.** If you are having a conversation with a D/deaf person, then that is the person you need to face and make eye contact with. The interpreter is there as a resource to facilitate your conversation.

- **An intervenor is different from a sign language interpreter.** An intervenor is a trained professional who "facilitates the interaction of [a] person who is deafblind with other people and the environment"[10]. They act as the "eyes and ears" of a deafblind person[11].

- **The D/deaf person(s) attending your event may have an interpreter they prefer to work with,** especially if the event is taking place in their home community. Clarify with the individual(s) involved before booking an interpreter.
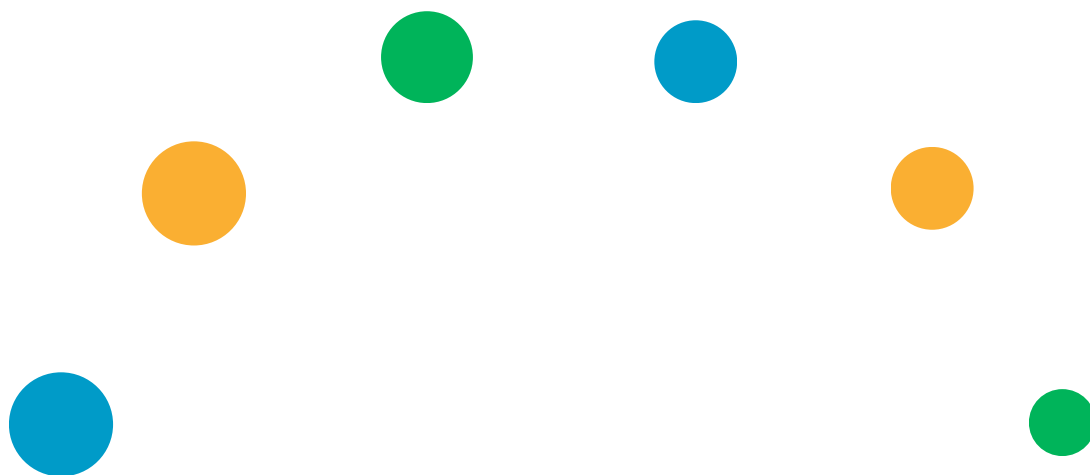
10 Deafblind Network of Ontario, What is an Intervenor (deafblindnetworkontario.com)
11 Ibid.

TIPS TO USE WHEN WORKING WITH
Newcomers Who Have Alzheimer's Disease

This tip sheet was developed using resources from the Alzheimer's Society of Canada, the Alzheimer's Society of the United Kingdom, the Alzheimer's Association of the United States, Dementia Support Toronto, Johns Hopkins Medicine, and the Mayo Clinic.

The Alzheimer's Society of Canada defines Alzheimer's disease as "a chronic neurogenerative disease that destroys brain cells, causing thinking ability and memory to decline over time" . Although Alzheimer's disease is irreversible and incurable, it is *not* an inevitable part of the aging process.[1] Settlement workers may work with senior clients who are forgetful or become disoriented but do not have Alzheimer's.

Alzheimer's disease is not the only form of dementia that newcomer clients may experience. While Alzheimer's accounts for approximately 60-80% of dementia diagnoses,[2] other forms of dementia include Lewy body, vascular, frontotemporal, Huntington's disease, and Wernicke-Korsakoff syndrome[3]. People with Parkinson's disease may also develop dementia[4]. Although most people diagnosed with Alzheimer's are aged 65+[5], dementia does not only impact seniors. For example, young-onset Alzheimer's can affect people in their 30s-50s and the first symptoms of Huntington's disease usually appear in this same age range. Because we know that Alzheimer's is the most common form of dementia, this tip sheet focuses on assisting clients with that diagnosis. Researching the medical, behavioural and psychological impacts of other dementias will better enable service providers to support a cross section of senior clients.

1 Alzheimer's Society of Canada, <u>What is Alzheimer's disease? | Alzheimer Society of Canada</u>
2 Ibid.
3 Alzheimer's Association of the United States, <u>What is Dementia? Symptoms, Causes & Treatment | alz.org</u>
4 Johns Hopkins Medicine, <u>Parkinson's Disease and Dementia | Johns Hopkins Medicine</u>
5 Mayo Clinic, <u>Young-onset Alzheimer's: When symptoms begin before age 65 - Mayo Clinic</u>
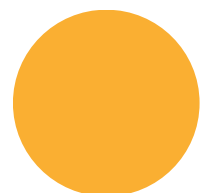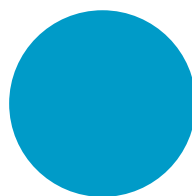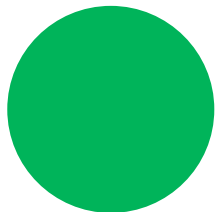
Please refer to the list below for some essential tips on working with clients who have Alzheimer's disease.

- **When working with a client who has Alzheimer's, try to stick to a routine**. If your building has multiple entrances, direct them to or greet them at the same one each time you meet. If you began your first meetings at a certain time of day or by talking about their family and hobbies, start subsequent meetings the same way.

- **If you have filled out paperwork or answered questions in a specific order in the past, try to replicate that order at your next meeting.** Routine helps people with Alzheimer's to feel more confident and in control of their environment.

- **When working with a client who has Alzheimer's, remove distractions**. Calm and well-lit environments with no or minimal distractions are the best settings when meeting with clients. Try to eliminate background noise, like the TV or radio.

- **Research shows that people with Alzheimer's may revert to their first language over time** [6]. This can be true of clients who have lived in Canada and spoken English or French as an additional language for decades. It may be necessary to have a family member accompany the client to meetings or to integrate the use of translation apps or an interpreter in your meetings.

- **Do what you can to fight the depression and isolation that clients may experience.** Settlement workers know that the experience of coming to Canada and being away from one's family or culture can have significant mental health impacts. For clients with Alzheimer's, they may feel doubly isolated due to changes in their brain that make communication and socializing difficult. Additionally, it is estimated that up to 40% of people with Alzheimer's suffer from "significant depression" [7]. Setting up a conversation circle or multicultural support group for clients with dementia can provide a much-needed lifeline – one that clients may not have access to elsewhere in their city or area.

6 Alzheimer's Society of the United Kingdom, Losing your English: 'Reverting' to your mother tongue as dementia progresses | Alzheimer's Society (alzheimers.org.uk)
7 Alzheimer's Association of the United States, Depression | Alzheimer's Association

- **In the later stages of the disease, Alzheimer's can impact the use of both fine and gross motor skills**[8]**.** Over time, dementia may impact a client's ability to do things like walk, eat, type, use a computer mouse or hold a pen[9]. For this reason, it is recommended that you reflect carefully on the format of services offered to a client with Alzheimer's. For example, an in-person conversation circle in a well-lit room where they are better able to read body language and facial expressions will likely be a better fit than a virtual conversation circle.

- **Finish one topic before moving on to the next and avoid asking too many questions in rapid succession.** For example, if you know a client wants to discuss both language classes and childcare options for their grandchildren at your next meeting, answer all of their questions about language classes before introducing the topic of your agency's on-site daycare.

- **Avoid judgment.** Using phrases like "Don't you remember?" or "How could you have forgotten?" does not encourage someone with Alzheimer's to better recall something next time. Instead, these phrases are more likely to trigger shame and frustration and should be avoided.

- **Do as much as possible before you meet with the client.** For example, if there is a form the client needs to fill out, let the client know ahead of time that you will be discussing the form at your meeting. Print off a copy and go through the form with them instead of referring them to a site or asking them to fill it out before arriving. This will help the client to better understand the information and provides them and their caregivers an opportunity to ask questions in real time.

8 Dementia Support Toronto, Signs and Symptoms of Alzheimer's Disease and Dementia | Dementia Support
9 Johns Hopkins Medicine, Alzheimer's Disease | Johns Hopkins Medicine

- **Keep as many ties as you can to the client's life before Alzheimer's.** It is best for the client and their caregivers if the client remains as connected as possible to who they were before the diagnosis. For instance, if a client loves games, you can recommend adaptations of popular card games and board games. These include snakes and ladders and Scrabble, which can be ordered with large print playing pieces. Games like bingo, dominoes and word searches also work well for people with dementia as they do not involve recalling complex information. **Research tells us that mahjong[10] and shiritori[11], in addition to similar games like gomoku and flying chess, have been found to help people maintain cognitive abilities and even delay cognitive decline. These games offer the added benefit of keeping people connected to their culture.**
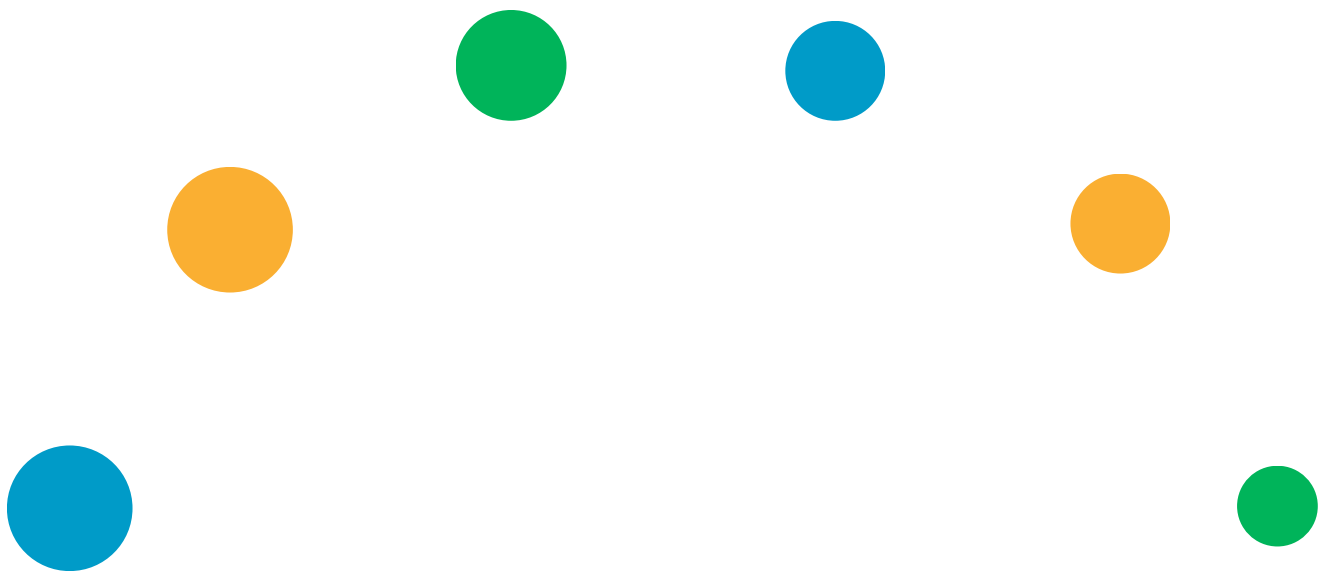
10 An exploratory study of the effect of mahjong on the cognitive functioning of people with dementia, International Journal of Geriatric Psychiatry (2006), An exploratory study of the effect of mahjong on the cognitive functioning of persons with dementia | Cochrane Library
11 Temporary improvement of cognitive and behavioral scales for Dementia elderly by Shiritori word game with a dialogue robot, Frontiers in Robotics and AI (2022), Temporary improvement of cognitive and behavioral scales for Dementia elderly by Shiritori word game with a dialogue robot: A pilot study - PMC (nih.gov)

Multilingual and Multicultural Resources on Alzheimer's and Dementia

The Alzheimer Society of Canada maintains a virtual national library that has multilingual resources to support agencies in working with clients who have Alzheimer's. By visiting the link below, you can access a resource titled *What is dementia?*, which describes dementia and its impacts. The resource is available in the following languages:

- Cantonese
- French
- Hindi
- Portuguese
- Punjabi
- Mandarin
- Spanish

The link also features information on how Alzheimer's is viewed in Indigenous communities across Canada.

Link: National resource library | Alzheimer Society of Canada

In addition to the above resource, the Alzheimer Society of Canada maintains comprehensive Chinese- and Punjabi-language resource hubs, which can be accessed at the links below.

Chinese-language resource hub: 腦退化資源 | Dementia information in Chinese | Alzheimer Society of Canada

Punjabi-language resource hub: ਡਿਮੈਂਸ਼ੀਆ ਦੀ ਜਾਣਕਾਰੀ ਪੰਜਾਬੀ ਡ ਿੱਚ | Dementia information in Punjabi | Alzheimer Society of Canada

The Alzheimer's Association of the United States has resources available in Vietnamese, Korean and Japanese. Please use the links below to access the resources.

**Japanese-language resources:** ホーム | Alzheimer's Association | Japanese

Korean-language resources: 홈 | Alzheimer's Association | Korean

Vietnamese-language resources: Trang chủ | Alzheimer's Association | Vietnamese

The Dementia Education Program at McGill University offers a resource guide titled *Dementia, Your Companion* that is available in the following languages.

- Arabic
- English
- French
- Greek

To access the guide, please visit the McGill website here: Dementia, Your Companion Guide | Dementia Education Program - McGill University
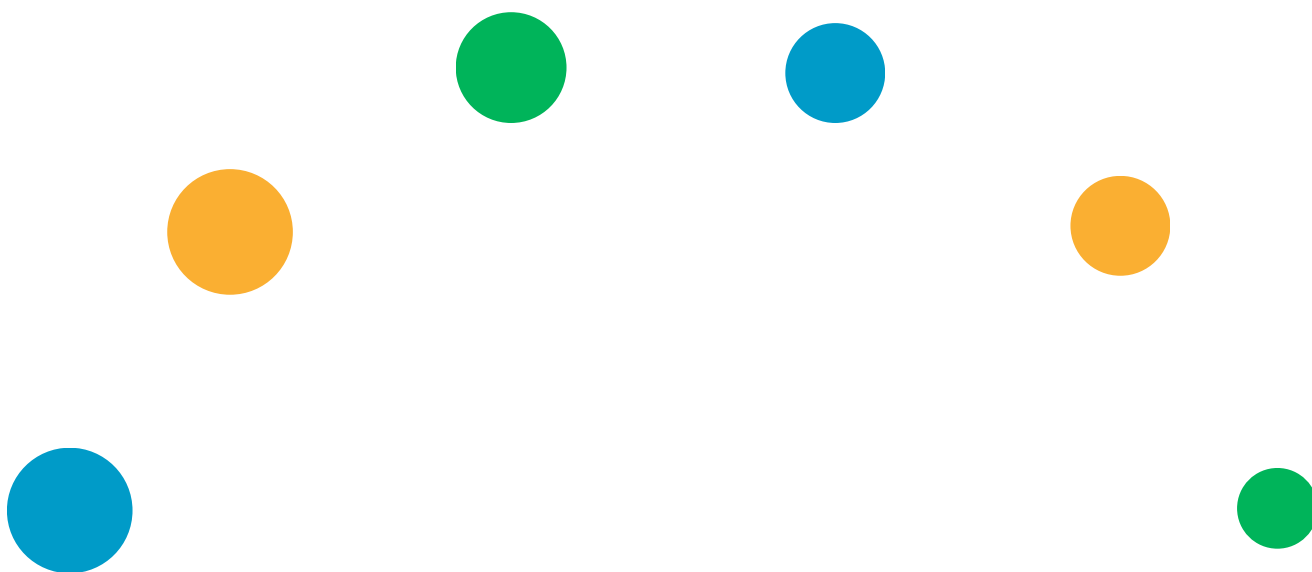
"We don't need feminism anymore, do we?" GBA Plus Interactive Activity

Click here to access the components of this tool on the SAISIA website

This tool requires a facilitator.

This tool is an interactive role-playing activity that can accommodate up to 20 participants.

The tool is designed for social service workers wishing to expand their understanding of GBA Plus, intersectionality, and feminism. Participants will explore the difference between "equality" and "equity" through the experiences of women in the 21st century workforce, including newcomers to Canada. Participants will discover how intersecting identity points shape a person's understanding of the world. The activity is followed by discussion questions and a debrief session.

Content Warning: This activity shares statistics and true-to-life scenarios on gender-based sexual assault and violence that may be triggering for some. It is recommended that a counselor or other mental health resource(s) is/are available to participants during and following the activity.

The Government of Canada offers 24-hour, toll-free crisis support for those impacted by the issue of Missing and Murdered Indigenous Women, Girls and Two Spirit People. This service can be accessed by calling 1-844-413-6649.
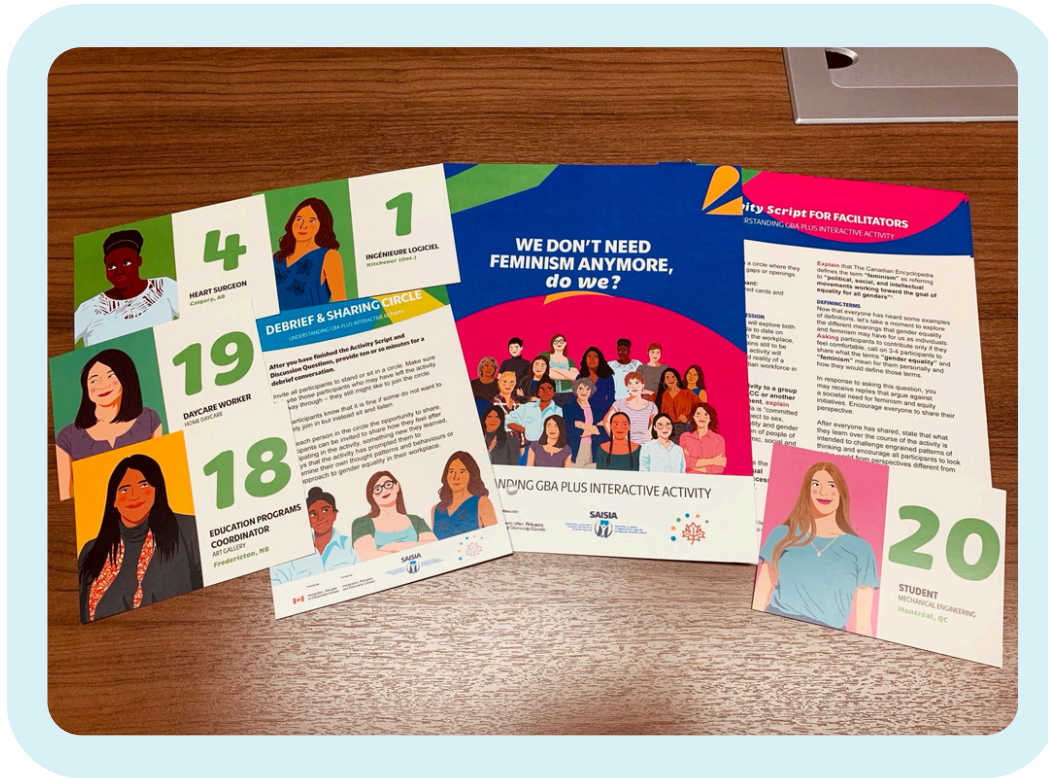
Photo of Interactive Activity materials

Organizational Strategies for Implementing GBA Plus

i. INTERNAL GBA PLUS READINESS

CASE STUDIES IN ACTION: STRENGTHENING PROGRAMS AND POLICIES WITH GBA PLUS AND INTERSECTIONALITY

Building a GBA Plus Case Study Template

TABLE OF CONTENTS

— PURPOSE

This resource presents real-life scenarios where settlement workers faced challenges or gaps in their programs and policies. By applying a Gender-Based Analysis Plus (GBA Plus) lens, these workers identified solutions to address those challenges. GBA Plus is crucial in ensuring programs are inclusive and equitable, considering the diverse needs of clients. After reviewing the case scenarios, readers are invited to use a provided template to reflect on challenges they have encountered in program design, delivery, evaluation, and organizational policies and practices, with a focus on enhancing GBA Plus reflex within their organizations.

PROGRAMS AND SERVICES

CASE STUDY 1

Empowering Women in Digital Literacy Programs

Context and Background

PROGRAM

Digital Literacy Program

TARGET POPULATION

Foundations level english-learners, primarily women from low-income, refugee backgrounds with little to no work experience in the tech sector.

IDENTIFIED GAP

A significant gap in services for low-level CLB (Canadian Language Benchmarks) learners, especially women who face barriers in accessing tech-related programs.

The Challenge

BARRIERS

The tech industry is male-dominated, and these women face additional challenges due to low language skills and lack of work experience. Additionally, cultural power dynamics often prevent women from engaging fully in the workforce, particularly those from refugee backgrounds.

GBA Plus Analysis

Gender, language ability, socioeconomic status, and refugee background were key factors influencing the access of women in the program.

Solution Development

PROGRAM DESIGN

A new program called Women Empowered Through Digital Literacy (WEDL) was created to help women build confidence in using technology. The program is specifically for women with lower English skills (CLB 3) and aims to reduce language barriers and close the gender gap in the tech industry. This program is designed to increase access to tech-related job opportunities and a reduction in gender disparities within the workforce.

Lessons Learned

FOCUS

The importance of designing programs that not only provide employment skills, but also empower marginalized groups to overcome societal and cultural barriers.

Reflections

What additional support might be necessary to ensure the success of participants in this program?

How can similar approaches be applied in other sectors where women or other marginalized groups are underrepresented?

CASE STUDY 2

Bridging the Gap for Older Adults in Digital Literacy and Health Services in a Rural Context

Context and Background

PROGRAM

Supporting newcomer older adults in accessing health services, in a rural context.

IDENTIFIED GAP

A rural municipality identified that older adults, particularly women, were uncomfortable accessing digital services, especially those related to women's health. Health knowledge mobilization takes place in a digital space now, limiting access to folks who are not comfortable with digital services (websites, QR codes, online forms, etc.). Cultural barriers further contributed to their reluctance.

The Challenge

BARRIERS

Older adults, women in particular, face challenges in accessing (women's health) services due to digital literacy hesitancy. Cultural taboos around discussing women's health make it more difficult for these individuals to seek help.

RURAL CONTEXT

Funding to create collaborative programs with physicians, to ease access to knowledge, is difficult in rural communities.

GBA Plus Analysis

INTERSECTIONAL FACTORS

Age, gender, cultural background, and geographical location play a significant role in the challenges faced by older adults in accessing health services, and health knowledge that is primarily available through online platforms.

Solution Development

PROGRAM DESIGN

As digital knowledge mobilization was not received well among older adult women, the municipality created a "Seniors Tea" program, where older adults could connect while having tea. The program aimed to build connections within cultural groups and with the broader community, while also sharing important information with them. The Seniors Tea both fosters social connections among other newcomer older adults, while providing them with information regarding services available to them, including health and digital literacy support.

Reflections

What strategies could you implement to make digital services more accessible and less intimidating for older adults?

What partnerships or collaborations could you develop with local physicians or community organizations to better support older adults in accessing health services?

CASE STUDY 3

Outreach and Program Registration for Vulnerable Senior Newcomers

Context and Background

PROGRAM

Newcomer Senior Community Connections and English Classes Programs

TARGET POPULATION

Senior newcomers living in isolation, single or in multigenerational families, with foundational-level English or no knowledge of the language.

IDENTIFIED GAP

There is a significant gap in access to services and programs for newcomer seniors who are isolated due to coming as single immigrants or due to the responsibilities and pressures of living in multigenerational households and having literacy and language barriers.

The Challenge

BARRIERS

Language and Literacy barriers and unfamiliarity with the transit system. Some programs are offered virtually, but some seniors may have digital literacy barriers.

Solution Development

PROGRAM DESIGN

Program Outreach and Engagement Strategy across all services aimed at Newcomer Seniors. Utilizing an intersectional lens and working to create an outreach program that uses non-traditional outreach strategies.

GBA Plus Analysis

INTERSECTIONAL FACTORS

Gender, language ability, socioeconomic status, and intergenerational and cultural differences.

Lessons Learned

FOCUS

The importance of designing programs that not only provide employment skills, but also empower marginalized groups to overcome societal and cultural barriers.

- Review the outreach strategies, including creating a plan and map of where the programs and services are being offered and promoted. Also, identify what additional supports can be in place for participants to access programs and services, such as interpretation services and support with transportation costs to access services, which will bring opportunities for independence and agency to newcomer participants.

- Create a potential plan of action for promotion to connect with non-traditional partners that could advertise or refer senior participants. Some stakeholders to consider are: Ethnic Food Stores, Places of Worship and Faith Communities, Walk-in Clinics, and Ethnocultural Groups with recreation or community-building activities.

- Ensure that the intake processes can be adapted to include an option of a non-written, conversational process that focuses on building relationships of trust and gathers intake information orally.

- Continue to offer registration options in multiple access and with access to interpretation services.

- Engage past participants in in-person feedback sessions on outreach strategies to provide additional information and community resources of which the organization may need to be made aware and connected.

- Another strategy to increase access for newcomer seniors is providing childcare options.

Reflections

What additional support might be necessary to increase the access and reach of participants, especially those with multiple barriers?

How can similar approaches be applied in other sectors where newcomer seniors or other marginalized groups are underrepresented?

Systemic and Resources Challenges in Small Centres for Newcomer Families with Children with Disabilities

Context and Background

PROGRAM

Newcomer Senior Community Connections and English Classes Programs

TARGET POPULATION

Senior newcomers living in isolation, single or in multigenerational families, with foundational-level English or no knowledge of the language.

IDENTIFIED GAP

There is a significant gap in access to services and programs for newcomer seniors who are isolated due to coming as single immigrants or due to the responsibilities and pressures of living in multigenerational households and having literacy and language barriers.

The Challenge

BARRIERS

• Limited supportive resources for children with disabilities within the local community and small centres

• Lack of culturally appropriate services for families of children with disabilities

• Limited knowledge and strained capacity of SWIS workers to support multiple partners (school staff, families, children, etc.), and navigate additional programs and benefits for families and their children.

GBA Plus Analysis

INTERSECTIONAL FACTORS

Gender, language, socioeconomic status, age, ability, family structures and dynamics, cultural differences.

Solution Development

PROGRAM DESIGN

Creation of a specialized SWIS position dedicated to supporting families and children with disabilities. This staff member will assist families in navigating systems and provide educational information to systems like schools or healthcare providers, regarding the unique intersectional needs of children with disabilities and their families.

Lessons Learned

FOCUS

Having a specialized position to act as a liaison between systems and adjacent supports for newcomer children with disabilities and their families.

- Specialized workers and programs can provide educational information with a cultural competency and humidity lens to the systems responsible in providing care to newcomer children with disabilities.

- Specialized workers can liaise and support the newcomer parents of children with disabilities to provide information and connect with specialized programs and support inside and outside the community.

- Specialized workers can gather information on local and regional resources that can support newcomer children with disabilities and their families, including benefits and additional services they may be able to access.

Reflections

↪ What additional support might be necessary to increase the access, especially to those with multiple, intersecting barriers?

↪ How can similar approaches be applied in other sectors where newcomers with disabilities are underrepresented?

PROGRAM EVALUATION

Youth Programming Feedback and Evaluation

Feedback Processes

INTERACTIVE FEEDBACK PROCESS

• In youth programming, feedback is collected through creative interactive methods, such as asking participants to share images of activities they enjoyed.

• This visual approach encourages engagement and allows participants to express their thoughts in non-traditional ways.

SURVEY FEEDBACK PROCESS

• Youth are also encouraged to share their opinions in a survey, to understand which topics are important to them

USE OF SOCIAL MEDIA

• Social media platforms are leveraged to gather real-time feedback from youth participants.

• This informal feedback collection allows for ongoing program adjustments and encourages active engagement from youth who may be more comfortable sharing their thoughts on these platforms.

Reflections and Opportunities for Improvement

While the youth programming feedback processes are interactive and effective, there may be opportunities for improvement to continue to expand feedback methods on digital platforms

The agency could also explore new ways to involve youth in the feedback process to ensure it is always responsive to their changing needs and preferences.

EQUITY IN ORGANIZATIONAL POLICIES AND PRACTICES

Diversifying Leadership and Board Representation

The Challenge

Lack of diversity in leadership and board composition

Overview

A few years ago, the board of a settlement agency lacked diversity, with few board members representing different cultures and backgrounds. This lack of representation posed challenges in decision-making and policy development, as important voices and perspectives were missing.

Response

The settlement agency took steps to diversify the board. Jobs were advertised widely online and through networks to ensure a broad range of applicants.

Impact

This process has helped maintain transparency and accountability within the organization's leadership, encouraging continuous improvement in management practices.

Reflections

How does a lack of diversity in leadership affect the quality and inclusivity of policies and decisions made within your organization?

What strategies could you adopt to ensure that your leadership represents the diversity of the community you serve?

In what ways can your leadership and board foster more inclusive practices and policies for the future?

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CASE STUDY 7

Enhancing an Organizational Policy for Inclusivity

The Challenge

Workplace inclusion regarding cultural holidays.

Response

This holiday policy was changed to provide staff with **two paid personal days**, allowing them to take time off for cultural or religious holidays, in addition to or instead of statutory holidays. This approach ensures that staff can observe holidays that are important to them.

Overview

This settlement agency's policy manual previously followed traditional Canadian statutory holidays. However, the new Executive Director recognized that staff members came from diverse cultural and religious backgrounds, leading them to reassess the holiday policy.

Impact

This policy shift created a more inclusive environment where staff felt their cultural and religious needs were respected, boosting overall staff morale, well-being, and retention.

Reflections

→ What other policies might unintentionally exclude certain groups, and how can they be improved?

→ How does your organization stay responsive to the evolving needs of its diverse workforce?

BUILD YOUR OWN CASE STUDY:

PUT YOUR KNOWLEDGE INTO PRACTICE

PROPOSED BRAINSTORMING QUESTIONS

Program and Program Evaluation

Describe an issue in planning a program for a diverse audience or a past challenge in reaching a particular newcomer, immigrant, and/or refugee group.

EXAMPLES

Challenges in outreach or attendance, demographics of group program attendees, evaluation of program effectiveness.

What are the hardest populations to reach? Are there barriers preventing clients from accessing your programs that can be addressed?

CONSIDERATIONS

Gender, country of origin, geographical location, immigration experience, language, social networks, isolation, power dynamics between staff and clients, mental health challenges, power imbalances in participant and staff interactions.

Organizational Policies

Describe a specific practice or policy within your organization that needs improvement.

CONSIDERATIONS

Does the policy reflect the needs of all relevant groups (staff, board members, and community)? Can individuals share concerns or provide input on the policy? Examples: Holiday leave, hiring practices, accessibility.

Is your organization open to revising policies based on feedback and changing needs? Is there a plan to regularly monitor and evaluate the policy's impact that considers diverse identity groups?

ASSESSING YOUR ORGANIZATION'S PROGRAMS AND POLICIES

Context

Define the context (who, what, when, where, why), key players/decision-makers, data, stakeholder analysis, public environment, and other relevant information.

Gap or Issue

Do you want to address a specific need or issue with a particular program or intervention?

How have you consulted with those affected by this program/service?

How diverse are the groups attending your programs? Who is not part of the conversation, and why?

Are the spaces accessible?

Building Relationships

How can we build new relationships with those not at the table?

What strategies can strengthen connections with these groups?

Solution Development

How can this program/policy be redesigned to address the gaps?

Can clients/staff be involved in developing these solutions?

Measuring Change

How will your organization assess the changes you aim to achieve with this program or policy?

How can you ensure that the proposed changes will be feasible and sustainable in the long-term?

ORGANIZATIONAL POLICY ASSESSMENT TOOL

Applying a GBA Plus Lens in the Newcomer-Serving Sector

TABLE OF CONTENTS

PREAMBLE

This document helps organizations improve their work practices, values, and policies to support social justice, anti-oppression, anti-racism, decolonization, and intersectionality, particularly for Immigrants, Newcomers, and Refugees. It was developed as part of the Enhancing National Sector GBA Plus Capacity project, funded by Immigration, Refugees, and Citizenship Canada (IRCC).

Using a GBA Plus lens ensures that your organization's policies, programs, and initiatives are inclusive and fair. Reflect on the key areas below to assess whether GBA Plus principles are integrated before using the GBA Plus Policy Assessment Tool.

Understanding Diverse Factors

Has the organization identified important identity factors like race, gender, immigration status, language diversity, sexual orientation, age, disability, neurodiversity, and religion?

Inclusive Language

Is the policy language inclusive and accessible from gendered or biased terms?

Are terms used consistently and clearly to avoid confusion?

Accessibility

Are the policies accessible to everyone, including people with disabilities?

Does the policy consider the group's diversity that will be affected by it?

Representation

Does the policy reflect the perspectives and needs of all relevant groups, such as staff, board members, and the community?

Are there processes to ensure that diverse voices are included in decision-making?

Fair Implementation

Are there steps to ensure fair access to resources and opportunities?

Is there a plan to monitor and evaluate how the policy impacts diverse identity groups?

Training and Awareness

Have staff and board members received training on GBA Plus and the importance of diversity and inclusion?

Is there an ongoing effort to raise awareness about the role of GBA Plus in policy development and implementation?

Feedback Mechanism

Can individuals share concerns or provide input on the policy?

Is the organization open to revising policies based on feedback and changing needs?

Monitoring and Evaluation

Are there clear indicators to measure how well the policy meets the needs of diverse groups?

Is there a plan to regularly monitor and evaluate the policy's impact that considers diverse identity groups?

By considering these questions and applying GBA Plus principles, your organization can identify potential gaps, enhance inclusivity, and ensure that policies are fair and meet the diverse needs of your target population.

GBA PLUS POLICY ASSESSMENT TOOL DESCRIPTION

This assessment form is designed to help your organization apply a GBA Plus lens. It will evaluate how well gender and other diverse identity factors are included in your policies.

Use this form to check whether GBA Plus principles are considered in the design and implementation of your policies. The questions will help identify areas where your organization excels or needs improvements. Depending on the assessed policy, "group" or "beneficiary" may refer to staff, board members, or the community. Make sure to identify this group before using the tool.

This tool is helpful for organizations that want to review their policies and procedures with a GBA Plus approach. You can evaluate and improve existing policies by analyzing your services and programs or create new ones where necessary. This tool supports regular policy evaluations, encourages adding intersectional analysis to the process, and includes critical guiding questions adapted from GBA Plus training provided by Women and Gender Equality, tailored for the Immigrant and Refugee Serving Sector.

The tool intendes to explore and analyze the following areas:

DESIGN AND RELEVANCE

IMPLEMENTATION

EFFECTIVENESS

How to use the tool?

Fill out the document details section.

Answer the questions of the Design and Relevance, Implementation, and Effectiveness Sections.

Fill out the section of the General Review Summary

Fill out the section on recommended mitigation strategies and potential changes that may be relevant to the program based on the initial review and reflection.

GBA PLUS POLICY ASSESSMENT TOOL

DOCUMENT TITLE

DOCUMENT TYPE

DOCUMENT YEAR

GENERAL POLICY REVIEW SUMMARY

RECOMMENDED SOLUTIONS AND CHANGES

DESIGN & RELEVANCE

1. Is the policy expected to contribute to justice, equity, diversity, and inclusion?

EVIDENCE OF GBA PLUS	ADDITIONAL COMMENTS/NOTES
YES NO	

2. Is the policy dealing with the main reasons for inequity?

EVIDENCE OF GBA PLUS	ADDITIONAL COMMENTS/NOTES
YES NO	

3. Did you consider different identity factors (like gender, race, immigration status, etc.) when developing the policy?

EVIDENCE OF GBA PLUS	ADDITIONAL COMMENTS/NOTES
YES NO	

4. Were the groups who would benefit from the policy identified before or while developing it?

EVIDENCE OF GBA PLUS	ADDITIONAL COMMENTS/NOTES
YES NO	

5. Does the policy clearly aim to address the needs of the target groups?

EVIDENCE OF GBA PLUS	ADDITIONAL COMMENTS/NOTES
YES NO	

6. Were the target groups included in the policy's development?

EVIDENCE OF GBA PLUS	ADDITIONAL COMMENTS/NOTES
YES NO	

7. Does the policy include the views and feedback from the target groups?

EVIDENCE OF GBA PLUS	ADDITIONAL COMMENTS/NOTES
YES NO	

8. Does the policy consider differences within and not just between diverse groups?

EVIDENCE OF GBA PLUS	ADDITIONAL COMMENTS/NOTES
YES NO	

9. Is the policy equally beneficial for all the diverse target groups?

EVIDENCE OF GBA PLUS	ADDITIONAL COMMENTS/NOTES
YES NO	

10. Are there groups that should be targeted but have been omitted?

EVIDENCE OF GBA PLUS	ADDITIONAL COMMENTS/NOTES
YES NO	

IMPLEMENTATION

1. Does the policy ensure fair and proportional access to diverse groups of people? Which groups in particular?

EVIDENCE OF GBA PLUS	ADDITIONAL COMMENTS/NOTES
YES NO	

2. Does the policy create or perpetuate barriers for specific target groups? Which groups in particular?

EVIDENCE OF GBA PLUS	ADDITIONAL COMMENTS/NOTES
YES NO	

3. Does the policy foster inclusion of diverse groups (for example, by enhancing said groups' feedback on or contribution to the development of the policy)?

EVIDENCE OF GBA PLUS	ADDITIONAL COMMENTS/NOTES
YES NO	

4. Were representatives of the target groups involved in implementing the policy?

EVIDENCE OF GBA PLUS	ADDITIONAL COMMENTS/NOTES
YES NO	

5. Is information about the policy equally accessible to diverse groups?

EVIDENCE OF GBA PLUS	ADDITIONAL COMMENTS/NOTES
YES NO	

6. Does the policy equitably address the needs of various target groups?

EVIDENCE OF GBA PLUS	ADDITIONAL COMMENTS/NOTES
YES NO	

7. Are there any groups that this policy isn't reaching?

EVIDENCE OF GBA PLUS	ADDITIONAL COMMENTS/NOTES
YES NO	

8. Is there a way for people to give feedback anonymously?

EVIDENCE OF GBA PLUS	ADDITIONAL COMMENTS/NOTES
YES NO	

EFFECTIVENESS

1. Has the policy met the goals you expected for different groups?

EVIDENCE OF GBA PLUS	ADDITIONAL COMMENTS/NOTES
YES NO	

2. Have results varied between different target groups? If so, what's causing these differences?

EVIDENCE OF GBA PLUS	ADDITIONAL COMMENTS/NOTES
YES NO	

3. Have differences in outcomes for diverse groups been dealt with, if needed?

EVIDENCE OF GBA PLUS	ADDITIONAL COMMENTS/NOTES
YES NO	

4. Have any unplanned positive or negative effects appeared for any target groups?

EVIDENCE OF GBA PLUS	ADDITIONAL COMMENTS/NOTES
YES NO	

5. Does the policy create or maintain obstacles for any target groups? If so, how have these barriers been addressed, if at all?

EVIDENCE OF GBA PLUS	ADDITIONAL COMMENTS/NOTES
YES NO	

6. Has the policy led to changes that support gender equity?

EVIDENCE OF GBA PLUS	ADDITIONAL COMMENTS/NOTES
YES NO	

7. Has the policy led to changes that tackle the underlying causes of injustice or inequities? If so, how significant are these changes?

EVIDENCE OF GBA PLUS	ADDITIONAL COMMENTS/NOTES
YES NO	

8. Will the positive outcomes related to justice, equity, and diversity last over time?

EVIDENCE OF GBA PLUS	ADDITIONAL COMMENTS/NOTES
YES NO	

9. Have you used methods like interviews or surveys to evaluate how effective the policy is? If yes, how did you incorporate the feedback and findings?

EVIDENCE OF GBA PLUS	ADDITIONAL COMMENTS/NOTES
YES NO	

REFERENCES

Integrating Gender-Based Analysis Plus into Evaluation: A Primer (2019)-Canada: https://www.canada.ca/en/treasury-board-secretariat/services/audit-evaluation/evaluation-government-canada/gba-primer.html

Tool for organizational self-assessment related to racial equity, October 2013, Tool for Organizational Self-Assessment Related to Racial Equity

ORGANIZATIONAL PROGRAM ASSESSMENT TOOL

Using a GBA Plus Lens in Program Design and Delivery in the Newcomer Serving Sector

TABLE OF CONTENTS

PREAMBLE

This document is a starting point for organizations to review their programs and services using a Gender-Based Analysis Plus (GBA Plus) approach. It was developed by a member of the Enhancing National Sector GBA Plus Capacity Project at the Manitoba Association of Newcomer Serving Organizations (MANSO), with funding from Immigration, Refugees and Citizenship Canada (IRCC).

The tool is designed for organizations that want to evaluate their programs, services, and procedures through a GBA Plus lens. By incorporating this analytical process, organizations can enhance new and existing programs, ensuring they are inclusive and equitable. The goal is periodically assessing and improving program design and delivery by adding an intersectional analysis using key questions from the GBA Plus framework.

Applying a GBA Plus lens is essential for organizations to ensure their programs and initiatives are inclusive and equitable. Before using the GBA Plus Program Assessment Tool, organizations should consider the following areas:

Diverse Identity Factors

Has the organization identified the relevant intersecting identity factors (e.g., race, gender, immigration status, language diversity, gender/sexual minorities, age, disability, neurodiversity, religion) for its programs?

Inclusive Language

Is the language used in the program inclusive and free from gendered or biased terms?

Has the organization adopted plain language strategies and considered the additional language needs of its target population?

Are terms used consistently and clearly defined?

Accessibility

Is the program accessible to all, including individuals with disabilities?

Does the program account for the diversity within the group intended to reach?

Representation

Does the program reflect the perspectives and needs of all relevant groups (staff, board members, community)?

Are there mechanisms to ensure diverse representation in program decision-making?

Equitable Implementation

Are there measures to ensure equitable access to resources and opportunities?

Is there a plan to monitor and evaluate the program's impact on diverse groups?

Training and Awareness

Have staff and board members received training on GBA Plus principles and the importance of diversity, inclusion, anti-racism, anti-oppression, etc.?

Is there ongoing awareness within the organization about GBA Plus, Anti-Racism, Anti-Oppression, or similar equity-driven frameworks?

Feedback Mechanism

➜ Can participants or clients provide feedback on the program?

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➜ Is the organization open and able to revise the program based on feedback and changing needs?

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Monitoring and Evaluation

➜ Are there clear indicators to assess the program's effectiveness in addressing the needs of diverse groups?

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➜ Is there a plan to regularly monitor and evaluate the program's impact on different intersecting identity factors?

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By considering these questions and integrating GBA Plus principles into program design and implementation, organizations can better identify gaps, enhance inclusivity, and ensure their policies are equitable and responsive to the diverse needs of their target population.

GBA PLUS PROGRAM ASSESSMENT TOOL DESCRIPTION

This tool helps you reflect on and identify gaps when evaluating programs, workshops, or services through a Gender-Based Analysis Plus (GBA Plus) lens. It assesses how well your organization's programs and initiatives consider gender and other intersecting identity factors. Use the following questions to see how GBA Plus is integrated into your work.

These questions ensure that diverse groups with unique intersectional identities are identified accurately and comprehensively in client-centered approaches. Before using this tool, your organization should clearly define its target group for the program, workshop, or service it intends to evaluate and tailor the questions to fit the specific program. These questions are based on guidelines from the GBA Plus training offered by Women and Gender Equality Canada and adapted for the Immigrant and Refugee Serving Sector.

The tool intendes to explore and analyze the following areas:

RELEVANCE

DESIGN & DELIVERY

EFFECTIVENESS

How to use the tool?

Fill in the Program Details Section

Answer the Questions in the Relevance, Design, Delivery, and Effectiveness sections

Complete the General Review Summary

Fill in the Recommended Mitigation Strategies section with potential changes or improvements based on your assessment

GBA PLUS PROGRAM ASSESSMENT TOOL

PROGRAM TITLE

_____

PROGRAM TYPE

_____

PROGRAM YEAR

_____

GENERAL REVIEW SUMMARY

_____

RECOMMENDED MITIGATION STRATEGIES AND CHANGES

_____

RELEVANCE

1. Does the program, workshop, or service aim to promote equity, diversity, and inclusion?

EVIDENCE OF GBA PLUS	ADDITIONAL COMMENTS/NOTES
YES NO	

2. Is the program, workshop, or service taking steps to address the root causes of inequity? Which causes does it seek to address?

EVIDENCE OF GBA PLUS	ADDITIONAL COMMENTS/NOTES
YES NO	

3. Were diverse groups consulted during the design process?

EVIDENCE OF GBA PLUS	ADDITIONAL COMMENTS/NOTES
YES NO	

4. Was accessibility (physical, sensory, linguistic, etc.) considered when designing the program, workshop, or service? How were accessibility concerns addressed?

EVIDENCE OF GBA PLUS	ADDITIONAL COMMENTS/NOTES
YES NO	

5. Does the program, workshop, or service focus on specific groups or communities? How and why were these groups chosen?

EVIDENCE OF GBA PLUS	ADDITIONAL COMMENTS/NOTES
YES NO	

6. Were the target groups involved in the development of the program?

EVIDENCE OF GBA PLUS	ADDITIONAL COMMENTS/NOTES
YES NO	

7. Is the program, workshop, or service designed to meet the needs of its target groups?

EVIDENCE OF GBA PLUS	ADDITIONAL COMMENTS/NOTES
YES NO	

8. Does the program, workshop, or service consider differences within diverse groups, not just between them?

EVIDENCE OF GBA PLUS	ADDITIONAL COMMENTS/NOTES
YES NO	

9. Could the program, workshop, or service create or continue barriers for other groups in the community?

EVIDENCE OF GBA PLUS	ADDITIONAL COMMENTS/NOTES
YES NO	

10. Are there any communities or groups that should be included but have been left out, perhaps due to funding or capacity limits?

EVIDENCE OF GBA PLUS	ADDITIONAL COMMENTS/NOTES
YES NO	

11. Does the program, workshop, or service align with goals for gender equity, anti-racism, and anti-oppression?

EVIDENCE OF GBA PLUS	ADDITIONAL COMMENTS/NOTES
YES NO	

12. Are diverse partners or rightsholders engaged in the program, workshop, or service?

EVIDENCE OF GBA PLUS	ADDITIONAL COMMENTS/NOTES
YES NO	

DESIGN & DELIVERY

1. Is the space where the program, workshop, or service takes place accessible (for physical, sensory, or other needs)? How was accessibility considered when selecting and preparing the space?

EVIDENCE OF GBA PLUS	ADDITIONAL COMMENTS/NOTES
YES NO	

2. Is the language used to deliver the program, workshop, or service inclusive of diverse identities and accessible to various languages and abilities? How was language checked for bias and assumptions?

EVIDENCE OF GBA PLUS	ADDITIONAL COMMENTS/NOTES
YES NO	

3. Were representatives from the target groups involved in implementing the program, workshop, or service? Which groups?

EVIDENCE OF GBA PLUS	ADDITIONAL COMMENTS/NOTES
YES NO	

4. Does the program, workshop, or service foster inclusion of target groups (for example, by enhancing said groups' feedback on or contribution to developing the program or service)?

EVIDENCE OF GBA PLUS	ADDITIONAL COMMENTS/NOTES
YES NO	

5. Is this program, workshop, or service not reaching particular groups? What is preventing this reach?

EVIDENCE OF GBA PLUS	ADDITIONAL COMMENTS/NOTES
YES NO	

6. Is information about the program, workshop, or service equally accessible to the various groups or communities it is trying to reach?

EVIDENCE OF GBA PLUS	ADDITIONAL COMMENTS/NOTES
YES NO	

7. Should other diverse or unique groups be considered? (i.e., particularly vulnerable populations such as Seniors, 2ELGBTQI+ youth or seniors, etc.)

EVIDENCE OF GBA PLUS	ADDITIONAL COMMENTS/NOTES
YES NO	

8. Are there mechanisms in place for anonymous program feedback?

EVIDENCE OF GBA PLUS	ADDITIONAL COMMENTS/NOTES
YES NO	
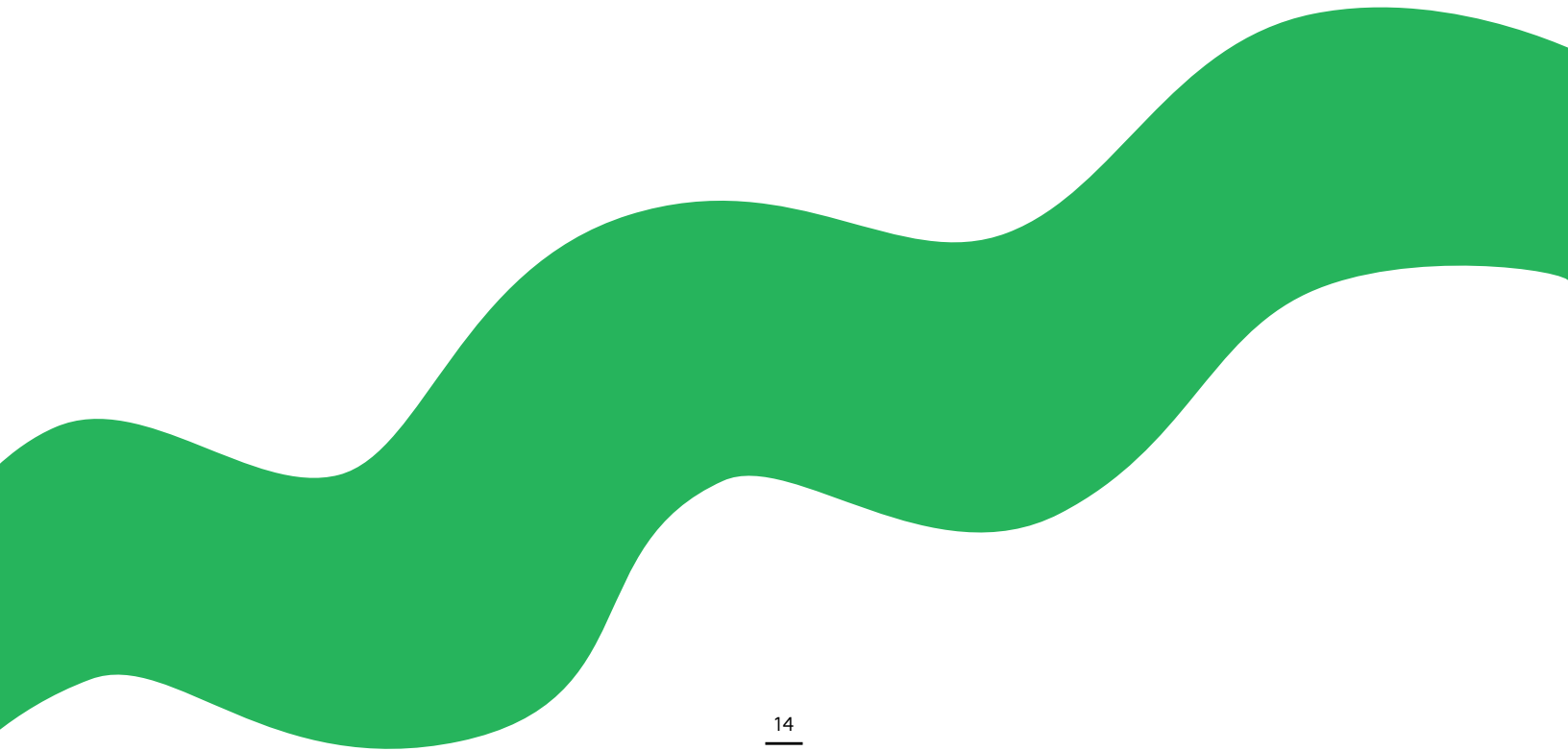
EFFECTIVENESS

1. Did the people who benefit from the program, workshop, or service help decide how to measure its success?

EVIDENCE OF GBA PLUS	ADDITIONAL COMMENTS/NOTES
YES NO	

2. Were any qualitative measures used to assess effectiveness? How were they incorporated?

EVIDENCE OF GBA PLUS	ADDITIONAL COMMENTS/NOTES
YES NO	

3. Has the program, workshop, or service achieved the expected outcomes for diverse groups? How have the outcomes impacted groups differently?

EVIDENCE OF GBA PLUS	ADDITIONAL COMMENTS/NOTES
YES NO	

4. Have underrepresented groups participated in the program, workshop, or service? To what extent?

EVIDENCE OF GBA PLUS	ADDITIONAL COMMENTS/NOTES
YES NO	

5. Have outcomes differed across diverse groups? What accounts for the differences?

EVIDENCE OF GBA PLUS	ADDITIONAL COMMENTS/NOTES
YES NO	

6. Have any disparities in outcomes for different target groups been addressed, if necessary? To what extent?

EVIDENCE OF GBA PLUS	ADDITIONAL COMMENTS/NOTES
YES NO	

7. Does the program or service equitably address the needs of various target groups?

EVIDENCE OF GBA PLUS	ADDITIONAL COMMENTS/NOTES
YES NO	

8. Have any unexpected or unintended impacts (positive or negative) emerged for any target groups? If so, how were they addressed, if at all?

EVIDENCE OF GBA PLUS	ADDITIONAL COMMENTS/NOTES
YES NO	

9. Has the program, workshop, or service created or perpetuated barriers for any target population groups? If so, how were they addressed, if at all?

EVIDENCE OF GBA PLUS	ADDITIONAL COMMENTS/NOTES
YES NO	

10. Have barriers or unexpected/unintended impacts (positive or negative) emerged for non-target groups? If so, how were these addressed or mitigated, if at all?

EVIDENCE OF GBA PLUS	ADDITIONAL COMMENTS/NOTES
YES NO	

11. Has the program, workshop, or service taken steps that could be considered gender-transformative/inclusive?

EVIDENCE OF GBA PLUS	ADDITIONAL COMMENTS/NOTES
YES NO	

12. To what extent has the program, workshop, or service fostered changes that address root causes of injustice and inequities?

EVIDENCE OF GBA PLUS	ADDITIONAL COMMENTS/NOTES
YES NO	

13. Are results related to equity and diversity likely to be sustained?

EVIDENCE OF GBA PLUS	ADDITIONAL COMMENTS/NOTES
YES NO	

REFERENCES

Integrating Gender-Based Analysis Plus into Evaluation: A Primer (2019)-Canada: https://www.canada.ca/en/treasury-board-secretariat/services/audit-evaluation/evaluation-government-canada/gba-primer.html

M. Reed (2023): Should we banish the word "stakeholder"?

Anti-Racism Anti-Oppression Organizational Assessment

Anti-Racism Anti-Oppression (ARAO) practices work to challenge, prevent, eliminate, and change the values, structures, policies, programs, actions, and behaviours that perpetuate racism and oppression, and in particular Anti-Black racism, in our society.

This assessment tool is designed to evaluate the current application of anti-racism anti-oppression principles and practices at im/migrant and refugee serving organizations through a series of standards across three areas:

1. Organizational Accountability: This section identifies basic standards which demonstrate an organization's commitment and accountability to ARAO.

2. Organizational Implementation and Application: This section identifies specific standards which demonstrate the operationalization of ARAO across the organization in various ways.

3. Organizational Principles and Culture: This section identifies standards which illustrate organizational norms, attitudes, and principles that reflect ARAO.

Who should complete the assessment?

This assessment can be used by anyone at the organization, including staff, leadership, board members and volunteers. The results should be compiled and used to inform a greater organizational discussion on anti-racism anti-oppression.

How can the assessment be used?

This assessment tool's purpose is to provide a starting point for the **identification of strengths, weaknesses, and gaps** across the three key areas. It is not a comprehensive evaluation of all areas of the organization, nor do the standards describe all of the different and possible applications and examples of ARAO. Keep in mind that this tool could be adapted to use as a survey or as a series of topics for focus group discussions.

After completing the assessment, users should consider how the information collected will inform further strategic action to create and sustain anti-racist and anti-oppressive organizational change and development.

Section 1: Organizational Accountability

1. **Our organization's values include a commitment to anti-racism anti-oppression, and this commitment is clearly communicated to all interested groups (i.e. staff, leadership, board members, volunteers, clients/service users, funders, partners, contractors, etc.)**

   ☐ Excellent / Area of Strength
   ☐ Fair / Average application
   ☐ Poor / Needs improvement
   ☐ In progress
   ☐ Not Applicable / Unknown

2. **Our organization has an anti-racism and anti-oppression policy and/or action plan.**

   ☐ Excellent / Area of Strength
   ☐ Fair / Average application
   ☐ Poor / Needs improvement
   ☐ In progress
   ☐ Not Applicable / Unknown

3. **Our organization's anti-racism anti-oppression policy and/or action plan identifies and defines its goals, scope, evaluation and monitoring mechanisms, and the roles and responsibilities of all involved groups.**

   ☐ Excellent / Area of Strength
   ☐ Fair / Average application
   ☐ Poor / Needs improvement
   ☐ In progress
   ☐ Not Applicable / Unknown

4. **Our organization's leadership demonstrates a strong, clear, and consistent commitment to supporting anti-racist anti-oppressive organizational change.**

   ☐ Excellent / Area of Strength
   ☐ Fair / Average application
   ☐ Poor / Needs improvement
   ☐ In progress
   ☐ Not Applicable / Unknown

5. **Our organization has mechanisms to identify and remove racism and oppression from our policies, practices, programs, and services.**

- [ ] Excellent / Area of Strength
- [ ] Fair / Average application
- [ ] Poor / Needs improvement
- [ ] In progress
- [ ] Not Applicable / Unknown

6. **Our organization has a defined and clearly communicated process for bringing, managing, and resolving complaints and conflicts within the organization.**

- [ ] Excellent / Area of Strength
- [ ] Fair / Average application
- [ ] Poor / Needs improvement
- [ ] In progress
- [ ] Not Applicable / Unknown

7. **Our organization has a committee, advisory group, team, or unit with a clear mandate and decision making power to support anti-racism anti-oppression initiatives across the entire organization.**

- [ ] Excellent / Area of Strength
- [ ] Fair / Average application
- [ ] Poor / Needs improvement
- [ ] In progress
- [ ] Not Applicable / Unknown

8. **Our organization is transparent about the objectives, means, decision-making processes and the allocation of resources for upholding and implementing anti-racism anti-oppression at the organization.**

- [ ] Excellent / Area of Strength
- [ ] Fair / Average application
- [ ] Poor / Needs improvement
- [ ] In progress
- [ ] Not Applicable / Unknown

Section 2: Implementation and Application

1. **Our organization upholds the fundamental understanding that discrimination and racism overlap and intersect with other factors and characteristics, such as sex, gender, disability, sexual orientation, age, family status, ethnic origin, and other protected grounds in Canadian human rights legislation, and must be seen and treated as interconnected (i.e. "intersectionality").**

   ☐ Excellent / Area of Strength
   ☐ Fair / Average application
   ☐ Poor / Needs improvement
   ☐ In progress
   ☐ Not Applicable / Unknown

2. **Our organization seeks to remove barriers and to create equitable, accessible, inclusive, and quality services to meet the needs and priorities of specific immigrant and refugees populations, such as 2SLGBTQI+ and gender-diverse people; women; Black and/or racialized communities; Indigenous peoples; people living in poverty; children, youth, or seniors; people living with intellectual, physical, mental health and/or other disabilities; criminalized individuals; and people with temporary or without immigration status.**

   ☐ Excellent / Area of Strength
   ☐ Fair / Average application
   ☐ Poor / Needs improvement
   ☐ In progress
   ☐ Not Applicable / Unknown

3. **Our organization promotes a common understanding of the language and terminology used to describe and promote anti-racism and anti-oppression at our organization, such as in a shared glossary of terms or through training(s).**

   ☐ Excellent / Area of Strength
   ☐ Fair / Average application
   ☐ Poor / Needs improvement
   ☐ In progress
   ☐ Not Applicable / Unknown

4. **Our organization's human resources policies and practices operationalize and affirm anti-racism anti-oppression in employee recruitment, interviewing, onboarding, retention, promotion, and performance development strategies.**

☐ Excellent / Area of Strength
☐ Fair / Average application
☐ Poor / Needs improvement
☐ In progress
☐ Not Applicable / Unknown

5. **Our organization collects data, including disaggregated data when possible, to inform and improve our organizational policies, human resources strategies, program, and service delivery priorities and outcomes.**

☐ Excellent / Area of Strength
☐ Fair / Average application
☐ Poor / Needs improvement
☐ In progress
☐ Not Applicable / Unknown

6. **Our organization provides training, professional development, and other learning opportunities on an ongoing basis to advance anti-racism anti-oppression knowledge and skills.**

☐ Excellent / Area of Strength
☐ Fair / Average application
☐ Poor / Needs improvement
☐ In progress
☐ Not Applicable / Unknown

7. **Our organization consults and involves staff, community members, and clients to identify, implement, and review initiatives and programs to support our commitments to anti-racism and anti-oppression.**

☐ Excellent / Area of Strength
☐ Fair / Average application
☐ Poor / Needs improvement
☐ In progress
☐ Not Applicable / Unknown

8. **Our organization designates staff time and resources for advocating change to social systems, public policy and/or legislation that have a negative impact on the communities that we serve and the work we do.**

- ☐ Excellent / Area of Strength
- ☐ Fair / Average application
- ☐ Poor / Needs improvement
- ☐ In progress
- ☐ Not Applicable / Unknown

Section 3: Organizational Principles and Culture

1. **Our organization recognizes the existence and impact of systemic racism and settler-colonialism in reproducing the differential inequities experienced by Black, Indigenous, and racialized individuals and communities in all of their diversity.**

   - ☐ Excellent / Area of Strength
   - ☐ Fair / Average application
   - ☐ Poor / Needs improvement
   - ☐ In progress
   - ☐ Not Applicable / Unknown

2. **Our organization actively challenges negative stereotypes, racism, and discrimination, and raises awareness on the systemic barriers facing racialized and marginalized communities.**

   - ☐ Excellent / Area of Strength
   - ☐ Fair / Average application
   - ☐ Poor / Needs improvement
   - ☐ In progress
   - ☐ Not Applicable / Unknown

3. **Our organization has authentic and reciprocal relationships with Indigenous communities, leaders, and organizations serving First Nations, Métis, and Inuit peoples.**

   - ☐ Excellent / Area of Strength
   - ☐ Fair / Average application
   - ☐ Poor / Needs improvement
   - ☐ In progress
   - ☐ Not Applicable / Unknown

4. **Our organization values and encourages the adoption of new and collaborative ways of producing and utilizing knowledge that center the experiences and expertise of racialized and marginalized communities.**

- ☐ Excellent / Area of Strength
- ☐ Fair / Average application
- ☐ Poor / Needs improvement
- ☐ In progress
- ☐ Not Applicable / Unknown

5. **Our organization's staff, leadership, and board reflects the communities that we serve.**

- ☐ Excellent / Area of Strength
- ☐ Fair / Average application
- ☐ Poor / Needs improvement
- ☐ In progress
- ☐ Not Applicable / Unknown

6. **Our organization works in solidarity and collaborates with other organizations and community members to best serve and improve the conditions and outcomes for immigrants and refugees.**

- ☐ Excellent / Area of Strength
- ☐ Fair / Average application
- ☐ Poor / Needs improvement
- ☐ In progress
- ☐ Not Applicable / Unknown

7. **Our organization creates space for critical reflection, dialogue, and informal collective learning on anti-racism anti-oppression.**

- ☐ Excellent / Area of Strength
- ☐ Fair / Average application
- ☐ Poor / Needs improvement
- ☐ In progress
- ☐ Not Applicable / Unknown

8. **Our organization examines the broader socio-political and economic trends impacting im/migrant and refugee communities.**

- ☐ Excellent / Area of Strength
- ☐ Fair / Average application
- ☐ Poor / Needs improvement
- ☐ In progress
- ☐ Not Applicable / Unknown

Settlement Sector Board Member Survey

Part I:
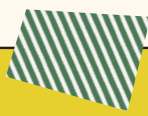
Instructions for completing the board member survey

1. Have the Board Chair tailor the board member survey to your organizational context. You can choose to omit some of the included skills and competencies, and/or add others. This template is meant to serve as a starting point for you to adapt to your needs. If a particular experience, skill, etc. listed is not relevant to your board now, you can select the "not relevant at this time" option so board members know that they do not need to indicate anything for that item.

2. Have the Board Chair designate someone within the organization to administer the survey, collect the responses, and aggregate the data in the board diversity matrix (Part II). This person should ideally not be a board member.

3. To best ensure the anonymity of board members, have the person designated to administer the survey print hard copies of the survey and provide them to board members to complete. If this is not possible, discuss as a team what other options exist to keep the responses anonymous.

4. Have all board members complete the survey anonymously, including the Board Chair. For each item listed, board members should indicate if they have that skill, competency, or experience, or self-identify with the diversity factor listed. If they do not possess a particular skill, competency, or experience, or self-identify with the diversity factor listed, then no selection is necessary.

5. Have the person who has been assigned to administer the survey collect the anonymous survey responses, aggregate the data, and enter this information into the board diversity matrix (see instructions in Part II), recording how many board members selected each option.

6. Once the data has been aggregated, the survey responses should be shredded to protect board members' privacy.

Note: Depending on the size of your organization's board, it may not be possible to ensure that survey responses will be entirely anonymous.

Settlement Sector Board Member Survey

LEVEL OF CURRENT REPRESENTATION ON THE BOARD

COMPETENCY / EXPERIENCE	CHECK IF APPLICABLE	not relevant at this time
Governance (e.g. chaired a board or committee)	☐	☐
Entrepreneurship or business development	☐	☐
Management	☐	☐
Strategic planning	☐	☐
Healthcare	☐	☐
Poverty reduction	☐	☐
Housing	☐	☐
Immigration	☐	☐
Frontline settlement sector	☐	☐
Research and higher education	☐	☐
Information technology	☐	☐
Human resources	☐	☐
Financial management	☐	☐
Fundraising	☐	☐
Marketing	☐	☐
Experience working with marginalized communities	☐	☐
Legal	☐	☐
Risk management	☐	☐
Public relations or communications	☐	☐
Program and event evaluation	☐	☐
Non-profit	☐	☐
Industry	☐	☐
Large-scale funding proposal submissions	☐	☐
Knowledge of IDEA, ARAO, or GBA Plus	☐	☐

PREVIOUS BOARD EXPERIENCE	CHECK IF APPLICABLE
Nonprofit	☐
Public	☐
Corporate	☐
Government (municipal, provincial, or federal)	☐

KNOWLEDGE OF COMMUNITIES	CHECK IF APPLICABLE
Community leader	☐
Experience working in rural areas	☐
Experience working in small centres	☐
Experience working in urban areas	☐
Lived experience as a newcomer	☐

SOCIAL IDENTITIES		CHECK IF APPLICABLE
Women		☐
Men		☐
Non-binary		☐
Ethno-racial		☐
Persons with disabilities		☐
Youth		☐
2SLGBTQIA+		☐
Seniors		☐
Indigenous peoples		☐
Diverse faith groups:	Christian	☐
	Sikh	☐
	Muslim	☐
	Jewish	☐
	Hindu	☐
	Buddhist	☐
	No religion or secular perspectives	☐
	Other religious or spiritual traditions – please specify	

Settlement Sector Board Diversity Matrix

Part II:

Instructions for aggregating the board member survey in the board diversity matrix

1. The person designated in Part I to administer the survey and aggregate the data—ideally not a board member—should begin by indicating in the matrix what items, if any, the board decided to select as "not relevant at this time" and omit the same items in the board diversity matrix.

2. Then they should fill out each category of the matrix using the data from the board member surveys, tallying how many board members, if any, selected each option.

3. Once complete, provide the completed board diversity matrix to the Board Chair.

4. At the bottom of each section there is a scale (from left to right) that reads: strong representation, some representation, more work needed, or diverse, somewhat diverse and increased representation needed. As Board Chair, determine the place that your board best fits on this continuum within each category. If you feel that your organization fits somewhere between the three provided options, you can select from the points between these options. You can also expand on this in the notes section included at the end of each session if needed.

5. At the bottom of each section, below the scale, there is also a space to provide some reflection on the aggregated data provided through the surveys. Use this space to reflect on how well you feel your organization is doing regarding board representation in each category. Do you have adequate representation? Is there more work to be done to increase representation and diversity in these areas?

6. Share back the completed board diversity matrix with board members. Use this as an opportunity to engage them in this reflection exercise.

7. Determine how will you go about addressing any representation gaps—if any—identified through the matrix moving forward.

8. Determine when/how frequently you will administer the survey and update the board diversity matrix.

Settlement Sector Board Member Survey

LEVEL OF CURRENT REPRESENTATION ON THE BOARD

COMPETENCY / EXPERIENCE	# CURRENTLY ON BOARD	not relevant at this time
Governance (e.g. chaired a board or committee)		
Entrepreneurship or business development		
Management		
Strategic planning		
Healthcare		
Poverty reduction		
Housing		
Immigration		
Frontline settlement sector		
Research and higher education		
Information technology		
Human resources		
Financial management		
Fundraising		
Marketing		
Experience working with marginalized communities		
Legal		
Risk management		
Public relations or communications		
Program and event evaluation		
Non-profit		
Industry		
Large-scale funding proposal submissions		
Knowledge of IDEA, ARAO, or GBA Plus		

strong representation	some representation	more work needed

Notes:

LEVEL OF CURRENT REPRESENTATION ON THE BOARD

PREVIOUS BOARD EXPERIENCE	# CUTRRENTLY ON BOARD
Nonprofit	
Public	
Corporate	
Government (municipal, provincial, or federal)	

strong representation   **some representation**   **more work needed**

Notes:

KNOWLEDGE OF COMMUNITIES	# CUTRRENTLY ON BOARD
Community leader	
Experience working in rural areas	
Experience working in small centres	
Experience working in urban areas	
Lived experience as a newcomer	

strong representation   **some representation**   **more work needed**

Notes:

LEVEL OF CURRENT REPRESENTATION ON THE BOARD

SOCIAL IDENTITIES	# CUTRRENTLY ON BOARD
Women	
Men	
Non-binary	
Ethno-racial	
Persons with disabilities	
Youth	
2SLGBTQIA+	
Seniors	
Indigenous peoples	
Diverse faith groups:	
Christian	
Sikh	
Muslim	
Jewish	
Hindu	
Buddhist	
No religion or secular perspectives	
Other religious or spiritual traditions – please specify	

very diverse   **somewhat diverse**   **increased representation needed**

Notes:

Assessing Board Diversity and Leadership Commitment to GBA Plus

Diversity within your organization's leadership, including among your board members, is a key consideration in assessing your organization's readiness and capacity to incorporate GBA Plus, as well as organizational commitment to the principles of equity, diversity, and inclusion, more generally. As Bernstein and Fredette (2024) explain,

building and retaining diverse leadership and governing groups is important, not just to demonstrate compliance with employment law and funder expectations (Bradshaw & Fredette, 2013; Miller-Millesen, 2003), or to improve ideation and decision-making (Forbes & Milliken 1999), or to expand stakeholder relationships and community understanding (Brown, 2005; Herman & Renz, 1998), but also because leadership diversity signals moral and ethical commitment to equity by legitimizing the value of underrepresented communities (Guo & Musso, 2007), and promotes engagement with and participation in power-redistribution efforts (Ray, 2019).[1]

1. Ruth Sessler Bernstein and Christopher Fredette, 2024, "Decomposing the Impact of Leadership Diversity Among Nonprofit Organizations," Nonprofit and Voluntary Sector Quarterly, 53(1), pp.81-82.

Prioritizing diversity and inclusion within your organization's leadership, and the work they undertake can have a strong impact on the level of broader organizational buy-in to equity-focused work, such as incorporating GBA Plus throughout organizational operations. This is because the ""tone from the top" signals what is important."[2] There is a critical link between diversity within nonprofit leadership and the equity work done by organizations.[3] A recent study found that "responding BIPOC-led organizations were […] markedly more likely to have programs designed to serve equity-deserving communities" (Lasby 2023, p.9). In the settlement context, strong consideration should be given to including those with lived experience as newcomers at all levels of your organization, including within leadership positions, to ensure that their valuable perspectives are included at all stages of the work your organization does.

Assessing the current level of diversity—both in terms of social identities and experiences represented within organizational leadership, as well as the skillsets that people are bringing into these roles—is an important step as it creates a baseline reading that can serve to both show you what communities and groups are already represented, as well as if there any representation gaps that need to be addressed. These gaps can help inform your organizational recruitment practices moving forward by allowing you to focus on the areas where your board can be strengthened and to target your recruitment efforts accordingly. This matrix should be updated as board composition and organizational needs change to ensure that representation gaps continue to be addressed.

To assist with this process, a settlement-sector-focused board diversity matrix template (with an accompanying board survey template) has been provided below. These templates can be adapted to reflect your organizational context. They are meant to serve as a tool to help track the representation of various skills, experiences, and social identities on your organization's board. If you find that there are gaps in certain areas once you have completed the matrix, this is okay (and to be expected). No board will 100% represent every aspect of the template. That said, ensuring as much diversity as possible will mean a stronger board because of the different perspectives and experiences being brought to the table. The matrix can help you visualize where the gaps lie and in doing so, can provide a starting point for addressing them. It should also be acknowledged that there can be challenges to diversifying organizational boards, including, but not limited to institutional structure and by-laws, availability of candidates, and relatedly the competition faced by non-profits for board members. However, even in these cases, it is worth considering how your board composition can be more diverse and what changes you can make to work toward this.

2. Wendy Cukier and Nancy Mitchell, 2022, "Diversity in Leadership," Charity Village, presentation slides are available at: https://charityvillage.com/wp-content/uploads/2022/02/50-30_Toolkit_For_Nonprofits.pdf
3. Lasby, 2023.

While board diversity is critical, it is also important that you ensure that all board members feel included once they are at the table. As Cardozo asserts,

> **There is a significant body of evidence suggesting that the sharing of diverse perspectives will always lead to stronger decisions. That said, I believe that focusing only on diversity will be meaningless unless we pay equal attention to all the aspects of inclusion at the board table. Without meaningful inclusion, a strategy to build a diverse board will, indeed, end up as an exercise in window dressing (Cardozo and Fullbrook, 2021, p.3, emphasis in original).**

Meaningful inclusion and participation of board members will ensure that the diverse perspectives that you have assembled inform the work that your organization does.

Boards must think of diversity and inclusion as separate, but equally important, elements for organizational leadership. As WGOB explains,

> **Diversity is about representation; it describes who is invited around the boardroom table. Inclusion, however, is the act of ensuring that everyone at the table can fully participate in the discussions and decision-making that happen in the boardroom. It's through inclusion that everyone in the boardroom is able to share their unique perspectives and experiences, a process which improves discussions and ultimately benefits the organization. "Inclusion is the superpower that unlocks diversity."** [4]

4. Women Get on Board (WGOB), n.d., Inclusive Boards: Unlocking the Power and Benefits of Diversity. Emphasis added.

A board focused on fostering a culture of meaningful inclusion "welcomes and celebrates differences, ensures that all board members are equally engaged and invested, [and] shares power and collective accountability for the board's work, the organization's mission, and its purpose."[5] Fucci and Cooper (2019) outline the five primary functions of boards, including strategy, governance, talent, integrity, and performance, and offer a thoughtful account of how to integrate meaningful inclusion within each of these areas of work.[6] As you consider what meaningful inclusion should look like within your organization, this resource can serve as a helpful starting point.

Additional Resources

- L. Robin Cardozo and Matt Fullbrook, 2021, "Not-for-Profit Board Diversity & Inclusion: Is it Essentially Window-Dressing," Rotman School of Management – The David and Sharon Johnstone Centre for Corporate Governance Innovation, University of Toronto. Available at: https://tspace.library.utoronto.ca/bitstream/1807/124595/1/Not_For_Profit_Board_Diversity_And_Inclusion.pdf (accessed 25 June 2024).
- Christopher Fredette, 2012, "Leadership Diversity in the Nonprofit Sector: Baby Steps, Big Strides, and Bold Stances," a DiverseCity Counts Research Report available at: https://continuing.torontomu.ca/upload/obc/diversecity-counts-5-full.pdf
- DiverseCity, "Diversity in Governance: A Toolkit for Nonprofit Boards," available at: https://bcfarmersmarket.org/app/uploads/2020/09/Diversity-on-Non-Profit-Boards-Toolkit.pdf
- David Lasby, 2023, "Shifting Power Dynamics: Equity, Diversity, and Inclusion in the Nonprofit Sector," Imagine Canada, available at: https://www.imaginecanada.ca/sites/default/files/Shifting-Power-Dynamics-Equity-diversity-and-inclusion-in-the-nonprofit-sector_0.pdf
- Mike Fucci and Terri Cooper, 2019. The Inclusion Imperative for Boards: Redefining Board Responsibilities to Support Organizational Inclusion. Deloitte Insights. Available at: https://www2.deloitte.com/us/en/insights/topics/value-of-diversity-and-inclusion/redefining-board-responsibilities-to-support-organizational-inclusion.html
- Women Get on Board (WGOB), n.d., Inclusive Boards: Unlocking the Power and Benefits of Diversity. Available at: https://womengetonboard.ca/inclusive-boards-unlocking-the-power-and-benefits-of-diversity/#:~:text=But%20what%20makes%20a%20boardroom,are%20equally%20engaged%20and%20invested

5. Ibid.
6. Mike Fucci and Terri Cooper, 2019. The Inclusion Imperative for Boards: Redefining Board Responsibilities to Support Organizational Inclusion. Deloitte Insights.

STAFF DIVERSITY AND INCLUSION SURVEY GUIDELINES

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STAFF DIVERSITY AND INCLUSION SURVEY GUIDELINES

This document is intended to serve as a guideline that can be adapted to various organizational contexts. The aim is to outline suggested initial steps, general goals and approaches for identifying and measuring diversity, equity, inclusion, and belonging within settlement organization teams. This guideline is meant for organizations to use as a blueprint for preparing to undertake a process within their teams and act as a guide for reflection and adapting what is relevant and appropriate to their local and organizational context.

SURVEY PURPOSE

This survey aims to capture a comprehensive snapshot of an organization's staff composition. Organizations can gain profound insights into their teams' diverse needs and identities by engaging in this self-identification survey. This process will help establish a baseline and thoroughly review policies and procedures.

The survey may highlight demographic areas for future recruitment efforts, targeting underrepresented groups in the staff composition. The organization can strategically focus on fostering inclusivity by identifying gaps and potential barriers.

As an integral aspect of an internal GBA Plus Enhancement Process, this survey aims to offer a snapshot of the current composition and serve as a dynamic tool for tracking and measuring positive changes in diversity and equity within an organization over time.

This approach underscores the sector's commitment to continual improvement and aligns to foster an inclusive and representative workplace environment. Upon collection and analysis of the data, here's how the data can be used:

1 HIRING PRACTICES

If the survey reveals imbalances (e.g., a high number of straight women but low representation of gender-diverse individuals), the organization might review and adjust its recruitment strategies to attract a broader pool of candidates. This could include specific outreach efforts to underrepresented groups, reviewing job descriptions for inclusive language, and training hiring managers on unconscious bias.

2 PROFESSIONAL DEVELOPMENT

Demographic data can also inform targeted professional development opportunities. For instance, if there's a large group of ethnically diverse employees, the organization might develop leadership programs or mentorship opportunities that are culturally responsive or address specific challenges faced by these groups.

3 WORKPLACE CULTURE

Understanding the demographic makeup helps in shaping a workplace culture that respects and celebrates diversity. For example, if there's a lack of gender-diverse employees, the organization might implement or strengthen gender inclusion policies, provide training on gender identity and expression, or create employee resource groups that support underrepresented communities.

4 POLICY ADJUSTMENTS

Policies might be revised to better support diverse needs. For example, if the survey shows a majority group that could overshadow minority experiences, the organization might introduce or revise policies to ensure that everyone's voice is heard and respected, such as more inclusive benefits, flexible working conditions, or anti-discrimination policies.

CONSIDERATIONS FOR FURTHER REFLECTION

CAN THE SURVEY IDENTIFY POWER AND PRIVILEGE DYNAMICS WITHIN THE ORGANIZATION AND CONTRIBUTE TO BALANCING THE PLAYING FIELD?

WRITE YOUR THOUGHTS

HOW CAN THE SURVEY PREVENT OVERBURDENING STAFF WITH UNIQUE INTERSECTIONAL IDENTITIES AND AVOID TOKENIZATION?

WRITE YOUR THOUGHTS

DEMOGRAPHIC AREAS TO MEASURE

Below are demographic areas for organizations to measure. The list below could be expanded and modified to add or remove categories that better suit the context of the organizations designing a staff survey.
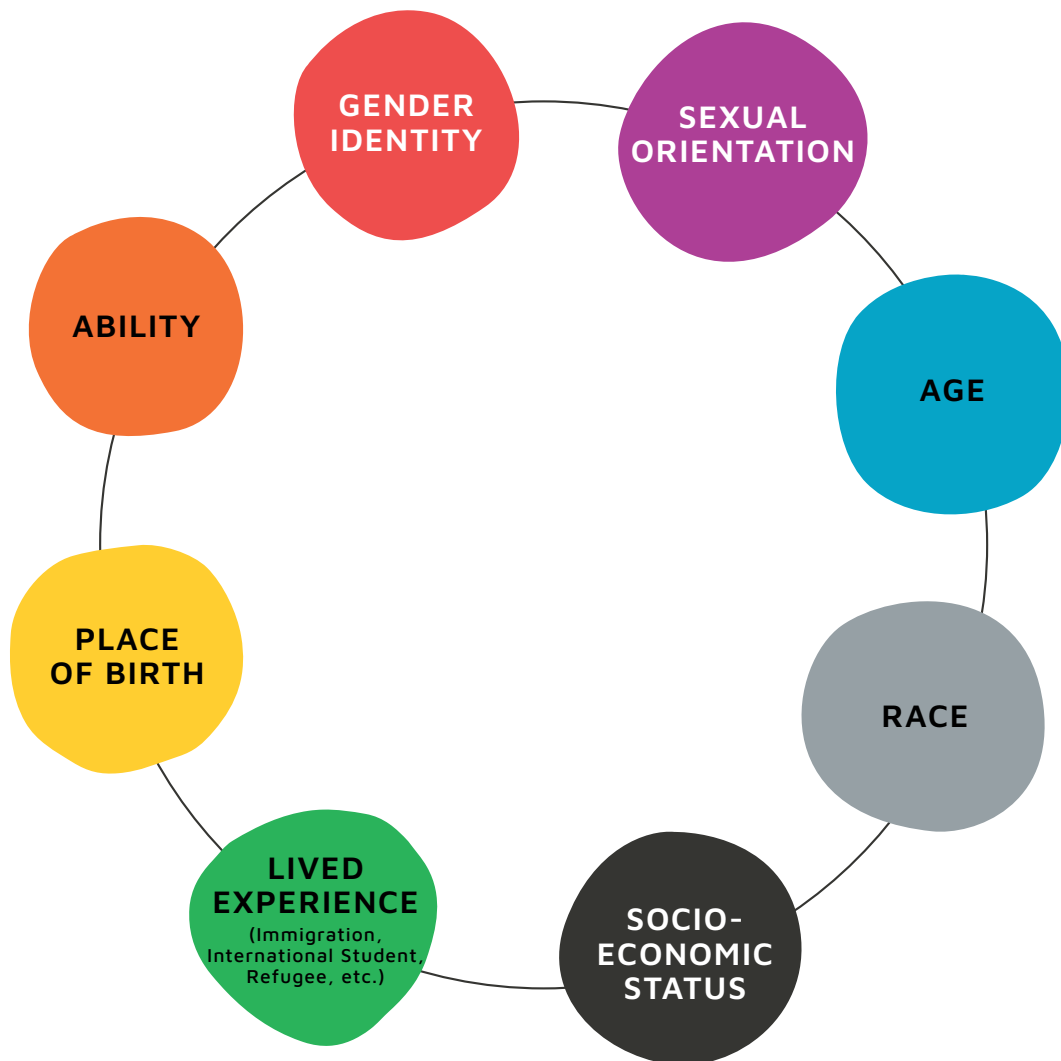
Considering various aspects such as intersectionality, accessibility, communication needs and preferences, neurodiversity, and immigration status, measuring belonging with a nuanced understanding of its diverse implications for individuals is crucial. Recognizing the multifaceted nature of these factors ensures a comprehensive and inclusive approach when assessing the sense of belonging within an organization.

The survey can be an opportunity to review yearly staff needs and inform decision-making processes, including policy reviews and program development. External factors influencing responses, such as seasonal changes and high workload periods, should be considered when looking into the timing and scope of the survey.

It is essential to communicate to staff that if they decide to participate in the survey, they are encouraged to do it during working hours, and the time taken to complete the survey is considered as work time.

This survey guidelines are meant to be used for organizations of every size. It is to be completed on an individual basis and is meant to be confidential.

PRIVACY AND SAFETY

Individual survey responses should be anonymous to respect the privacy and safety of all involved. Carefully consider who has access to this information, how it is stored, and when it is destroyed. (See the **Working with Staff Data** document for more information).

Organizations are encouraged to share summary responses with the staff team. Sharing results with staff fosters transparency and accountability and prevents stereotypes.

The staff team must understand how the collection of internal survey data will be connected to future organizational actions. It is vital to engage with staff and be transparent about who can review the raw data from the survey and what measures will be taken to protect their safety and privacy. While engaging in this process, the organization can identify staff concerns and plan recommendations or suggestions on how to address them.

It is recommended that you add a link to Employee Assistance Programs or free mental health resources in case some of the survey content triggers staff; make sure you offer additional support when and if needed.

To support organizations in starting this process, we have created a **sample survey** that can be adapted as needed, depending on the organization's needs and context. As part of the sample survey document, you will find a glossary of terms; it is encouraged that you have those definitions embedded within the survey. We prefer that you have the definitions pop up as some of the words from the glossary of terms appear in the survey questions. This option is recommended instead of providing a separate link, but if that is not possible. Ensure the link to the glossary of terms is at the beginning of the survey.

Organizations should use **specialized online survey analysis software** (e.g., SurveyMonkey, Microsoft Forms, Qualtrics, etc.). To gain comprehensive insights, it's essential to consider using tools that allow for demographic segmentation and trend analysis. In addition, these tools allow for more privacy and have features to make the surveys anonymous and protect staff confidentiality.

POTENTIAL SURVEY OUTCOMES

Assess organizational knowledge of the intersectional identities of staff and team members to avoid assumptions.

Assess if organizational policies align with the diversity of employees and gauge perceptions of inclusion and belonging.

Evaluate if the organization's staff and leadership reflect the communities served and explore workplace culture and climate.

NEXT STEPS

HOW TO LAUNCH THE SURVEY IN 4 WEEKS?

This next section contains suggested steps your organization may want to consider before distributing the survey to the whole staff team.

- Four weeks before launching the survey, make sure you announce it to the whole staff, addressing its goals, purpose, how it can improve the organization and the workplace environment, and the planned steps to ensure staff confidentiality.

- 2-3 weeks before launch, make sure there is a conversation within small staff groups, either departments or teams that usually work together. This is to discuss the goals and purpose of the survey, gather some general feedback on the process, and answer questions from staff. Be explicit in explaining how the data collected will be handled and used.

- 1-2 weeks before launching the survey, connect with supervisors, including checking in with individual staff members regarding additional questions or concerns related to the survey purpose and launch.

- One week before the survey, send an all-staff communication reiterating the purpose and how the data will be handled and clarifying that this is a voluntary activity.

PROCESSING STAFF SURVEY RESULTS

When receiving the staff survey results, it is important to consider the following:

After reviewing the survey results, explore the following question: How can these results be used to improve internal processes and procedures?

Prepare a plan to report back on the results to the staff team and use the opportunity to use this as an accountability mechanism.

Be intentional in creating the space for this conversation, meeting staff where they are, and building a plan.

Please review the following **Working with Staff Data** document to strengthen your plan for processing the results. Additionally, the GBA Plus Policy Assessment Tool should be considered as a complementary tool to support internal policy change.

— GLOSSARY OF TERMS

ABLEISM

Ableism refers to prejudiced thoughts and discriminatory actions based on differences in physical, mental, and/or emotional ability; usually that of able bodied/minded persons against people with illness, disabilities, or less developed skills[1].

ACCESSIBILITY

Accessibility is the combination of aspects that influence a person's ability to function within an environment and to access it with ease[2].

AGEISM

Ageism refers to the stereotypes (how we think), prejudice (how we feel), and discrimination (how we act) towards others or oneself based on age[3].

AROMANTIC

A person who experiences little or no romantic attraction to others and/or has a lack of interest in romantic relationships/behavior[4].

ASEXUAL

A person who does not experience sexual attraction to people of any gender.

BISEXUAL

A person who is attracted to people of more than one gender.

CISGENDER

A person is cisgender when their gender identity aligns with their sex assigned at birth.

DISABILITY	Any impairment, including a physical, mental, intellectual, cognitive, learning, communication or sensory impairment - or a functional limitation - whether permanent, temporary or episodic in nature, or evident or not, that, in interaction with a barrier, hinders a person's full and equal participation in society.
DISCRIMINATION	Discrimination is an action or a decision that mistreats a person or a group for reasons such as race, age, disability, gender etc[5].
EQUITY	Equity is fairness and justice achieved through systematically assessing disparities in opportunities, outcomes, and representation and redressing [those] disparities through targeted actions.
FLUID	A person who does not identify with the gender binary and move within genders and gender stereotypes.
GAY	A person who is attracted to people of the same gender. It can also refer generally to people who are not cisgender or straight[6].
GENDER	Socially constructed roles, behaviors, expressions, and identities of girls, women, boys, men, and gender-diverse people. It influences how people perceive themselves and each other, how they act and interact, the distribution of power and resources in society, and people's social, health and economic outcomes.

GENDER EQUALITY	Gender equality refers to equal rights, responsibilities and opportunities for women, men and non-binary people. Equality refers to the state of being equal while equity refers to the state of being just, impartial or fair. However, equality of opportunity by itself does not guarantee equal outcomes for women, men and non-binary people.
GENDER EQUITY	Gender equity refers to fairness, impartiality and justice in the distribution of benefits and responsibilities between women, men and non-binary people. Unlike gender equality, which simply provides for equality of opportunity, gender equity explicitly recognizes and actively promotes measures to address historical and social disadvantages. By 'levelling the playing field,' gender equity creates circumstances through which gender equality can be achieved. Gender equity means providing all social actors with the means to take advantage of equality of opportunity.
GENDER EXPRESSION	Gender expression refers to the various ways in which people choose to express their gender identity. For example: clothes, voice, hair, make-up, etc. A person's gender expression may not align with societal expectations of gender. It is therefore not a reliable indication of a person's gender identity.
GENDER IDENTITY	Gender is how people perceive themselves with respect to their gender. Gender identity is not confined to a binary (girl/woman, boy/man) nor is static; it exists along a continuum and can change over time. There is considerable diversity in how individuals and groups understand, experience and express gender through the roles they take on, the expectations placed on them, relations with others and the complex ways that gender is institutionalized in society.
GENDER NON-CONFORMING	Someone whose gender identity and/or gender expression expands beyond, actively resists, and/or does not conform to the current cultural or social expectations of gender, particularly in relation to male or female[7].

HOMOPHOBIA	Feelings of hatred, fear, and/or disdain for people that are not heterosexual[8].
INTERSECTIONALITY (WAGE DEFINITION)	A theoretical approach that acknowledges that our lives are shaped by multiple, overlapping or intersecting identity factors (e.g., race, class, gender), which results in unique, and complex lived experiences that impact how we experience federal policy, programs, and legislation. Compounding discrimination based on identity factors can create barriers for some or opportunities for others.
INTERSECTIONALITY	Intersectionality is a metaphor for understanding the ways that multiple forms of inequality or disadvantage sometimes compound themselves and create obstacles that often are not understood among conventional ways of thinking.
LESBIAN	A woman who is attracted to a woman.
LIVED EXPERIENCE[9]	Someone whose gender identity and/or gender expression expands beyond, actively resists, and/or does not conform to the current cultural or social expectations of gender, particularly in relation to male or female.
NON-BINARY	A person whose gender identity does not fall within the binary genders of man or woman.
OPPRESSION	The unjust use of power to disempower, marginalize, silence or otherwise subordinate specific groups or categories, often in order to further empower and/or privilege the oppressors.

ORGANIZATIONAL CULTURE	Organizational culture is the collection of shared values, beliefs, attitudes, and practices that shape how people behave and interact within an organization. It's the "personality" of a company, encompassing everything from the way employees communicate to the unwritten rules about how work gets done. This culture influences how decisions are made, how employees are treated, and how the organization presents itself to the outside world.
PANSEXUAL	A person who experiences sexual, romantic, physical, and/or spiritual attraction for members of all gender identities/expressions.
QUEER	Historically a slur, reclaimed by some people that do not identify as cisgender and/or straight.
QUESTIONING OR UNSURE	An individual who is unsure of and/or exploring their gender identity and/or sexual orientation.
RACISM	Is an ideology and system of beliefs wherein distinctive attributes are evaluated relating to ideas of inherent superiority and inferiority. It is the act whereby one group of individuals exercises power over another group based on skin colour based on a set of actions, erroneous assumptions and implicit or explicit beliefs. Racism manifests within organizational and institutional structures, programs, and individual attitudes, thoughts, or behaviour patterns.
SAME-GENDER-LOVING	A term some prefer to use instead of lesbian, gay or bisexual to express attraction to and love of people of the same gender[10].
SEX	Refers to a set of biological attributes. It is primarily associated with physical and physiological features, including chromosomes, gene expression, hormone levels and function, and reproductive/sexual anatomy. Sex is usually categorized as female or male, but there is variation in the biological attributes that comprise sex and how those attributes are expressed.

SEXISM	Discrimination and prejudice against someone of a certain sex.
SEXUAL ORIENTATION	A term used to describe a person's emotional, romantic, or sexual attraction.
STRAIGHT (HETEROSEXUAL)	A person who experiences sexual, romantic, or emotional attraction with a member of the opposite sex or gender.
TRANSPHOBIA	Feeling hatred, fear, or [11]disdain for transgender people.
TRANSGENDER	A person whose gender identity and/or biological characteristics differs from the sex they were assigned at birth.
TWO-SPIRIT	A culturally-specific gender identity. 2S people serve an integral role in Indigenous communities. We place 2S at the beginning of initialism to recognize Indigenous people as the first to build gender-diverse communities in Canada.

[1]Source: Guide on Equity, Diversity and Inclusion Terminology; *Glossary of Terms: Race, Equity and Social Justice | icma.org1).

[2]https://cihr-irsc.gc.ca/e/documents/asa_glossary_terms_accessibility_systemic-ableism-en.pdf

[3]World Health Organization: https://www.who.int/news-room/questions-and-answers/item/ageing-ageism

[4]https://www.vanderbilt.edu/lgbtqi/resources/definitions

[5]https://www.chrc-ccdp.gc.ca/en/about-human-rights/what-discrimination

[6]2SLGBTQIA+ Terminology Guide and Media Reference Tool

[7]https://itgetsbetter.org/glossary/gender-nonconforming/

[8]2SLGBTQIA+ Terminology Guide and Media Reference Tool

[9]OCASI, Anti-Racism and Anti-Oppression Framework Glossary

[10]https://www.hrc.org/resources/glossary-of-terms

[11]2SLGBTQIA+ Terminology Guide and Media Reference Tool

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Staff Inclusion & Diversity Survey

As part of our commitment to Gender-Based Analysis Plus (GBA Plus), this survey helps us understand the diverse identities and needs of our staff. It will also help us track and measure our progress toward a more diverse, equitable, and inclusive workplace over time.

By engaging in this self-identification survey, you are helping your organization identify potential gaps and barriers to inclusivity. This will enable the leadership team to strategically focus on fostering a workplace environment where everyone feels valued and respected. Collecting demographic data allows us to understand the diversity of our staff and identify any areas where representation may be lacking. With this information, we can:

1. **Refine Hiring Practices**: Adjust recruitment strategies to attract a more diverse pool of candidates and ensure equitable opportunities for all.
2. **Enhance Professional Development**: Offer targeted programs and mentorship opportunities that address the specific needs of different groups.
3. **Foster an Inclusive Workplace Culture**: Shape policies and initiatives that respect and celebrate diversity, such as gender inclusion policies and support for underrepresented groups.
4. **Revise Policies for Inclusivity**: Make necessary adjustments to policies, ensuring they support the diverse needs of our staff and create an environment where all voices are heard and respected.

This data will help the organization identify where it might need to focus its efforts to create a more balanced, inclusive, and supportive environment. It's not just about counting numbers but understanding how those numbers reflect the lived experiences of staff and then using that insight to drive meaningful change.

To further your engagement and understanding of the survey, **please review the glossary of terms link or document before completing it.**

Your participation is voluntary; you may skip any questions you do not wish to answer. The survey is completely anonymous, and your responses will remain confidential in accordance with the Freedom of Information and Protection of Privacy Act (FOIP). We will only use the results in aggregate form, meaning your results will be combined with everyone who completes the survey, and will be analyzed as a group, without identifying individuals. The overall findings will then be shared with the staff team to identify general areas for improvement along with the organization's proposed changes and steps to address them.

We encourage all staff members to participate in this important initiative to help us build a more inclusive workplace for everyone.

Section 1: Demographic Information

Collecting demographic information such as gender, sexual orientation, gender identity, age, etc., helps the organization understand the diversity of our staff. This data allows us to identify any trends or patterns that may affect different groups within our organization. By analyzing this information, we can work to ensure that our policies, programs, and workplace culture are inclusive and equitable for everyone. All demographic data will be collected anonymously and used in aggregate form to protect individual privacy.

Gender identity is a personal concept and can mean different things to different people. Please select the option(s) that best reflect your gender.

1) a) What is your Gender? (Please select all options that apply to you)
   o   Woman
   o   Man
   o   Two-Spirit
   o   Non-Binary
   o   Additional identity not listed, please specify: _____
   o   Prefer not to disclose.

   b) Do any of the following terms describe your gender identity?
   o   Cisgender
   o   Transgender
   o   Gender Non-Conforming
   o   Additional identity not listed, please specify: _____

   o   Prefer not to disclose.

2) What is your Sexual Orientation/Sexual Identity? (Please select all options that apply to you)

   o   Aromantic
   o   Asexual
   o   Bisexual
   o   Fluid
   o   Pansexual
   o   Gay
   o   Lesbian
   o   Queer
   o   Questioning or unsure
   o   Same-gender-loving
   o   Straight (Heterosexual)
   o   Additional category/identity not listed: _____
   o   Prefer not to disclose

3) Choose your age range:

   o   18 to 24
   o   25 to 34
   o   35 to 44
   o   45 to 54
   o   55 to 64
   o   65 or over

o Prefer not to disclose

4) How do you identify in terms of ancestry and ethnicity? **Please select all that apply to you.**

- o White/Caucasian
- o European
- o Black/African Descent (including Caribbean, Latin American etc)
- o Indigenous to Canada (First Nations, Metis, Inuit etc.)
- o Indigenous to regions other than Canada (South America, Australian Aboriginal, etc.)
- o East Asian (eg. Chinese, Japanese, Korean etc)
- o South Asian (eg. Indian, Pakistani, Bangladeshi etc)
- o Southeast Asian (eg. Filipino, Thai, Vietnamese etc)
- o Middle Eastern/North African (including Arab, Persian etc)
- o Latin-American
- o Multiracial
- o Other - please specify: _____
- o Prefer not to disclose

5) Do you identify as a person with a disability? (Includes physical, intellectual, sensory conditions that may be temporary, sporadic, or permanent)

- o Yes
- o No
- o Prefer not to disclose

6) Where were you born?

- o In Canada
- o Outside of Canada
- o Prefer not to disclose

Section 2: Employment Information

This section collects information about your employment history with our organization. Knowing about your time here and your role helps us better understand and improve *our programs and initiatives to meet the needs of our staff better.*

7) How long have you been employed at the organization?

- o 0-1 Year
- o 1-3 Years
- o 3-5 Years
- o 5-10 Years
- o 10+ Years

8) What is your employment status?

- o Full Time
- o Part Time
- o Casual/Seasonal

Section 3: Accessibility

This section asks about your accessibility needs. Your feedback is crucial in helping us create an environment where everyone has equal access to opportunities and resources. By Understanding these needs, we will be able to make the necessary adjustments and improvements to ensure our workplace is accessible and supportive for everyone.

9) Do you have any accessibility needs?

   o Yes
   o No
   o Prefer not to disclose

10) If you answered Yes to question 9. Did you disclose them to your supervisor or organization?

   o Yes
   o No
   o Not applicable
   o Prefer not to disclose

11) Did the organization offer to provide accommodations?

   o Yes
   o No
   o Not applicable
   o Prefer not to disclose

12) Have you received what you need if you asked for an accommodation?

   o Yes
   o No
   o Not applicable
   o Prefer not to disclose

13) Have you experienced ableism while working at our organization?

   o Yes
   o No
   o Not applicable
   o Prefer not to disclose

14) Do you think the organization's culture reflects an understanding of ableism?

   o Yes
   o No
   o Prefer not to disclose

Section 4: Additional Lived Experiences

We value the diverse experiences of our staff. This section invites you to share any relevant lived experiences that shape your perspective and needs. By collecting this information, we can identify common challenges and gaps in support within our organization. This allows us to create targeted programs, adjust policies, and offer resources that directly address these needs, ultimately fostering a more inclusive and supportive workplace where every employee feels valued and understood.

15) Do you have any of these lived experiences? (Please select all options that apply to you)

- o Immigrant
- o International Student
- o Indigenous Ancestry (North America)
- o Refugee
- o Family Spousal Sponsorship
- o Asylum Seeker
- o Poverty/Socio-Economic Status
- o Racial/Ethnic Discrimination
- o Faith-Based Discrimination (Islamophobia, Anti-Semitism, etc.)
- o Gender-Based Violence
- o Surviving war or conflict
- o Speaking Multiple Languages
- o Prior Education or Work Experience not being recognized in Canada
- o Another relevant lived experience: _____
- o Prefer not to disclose

Section 5: Experiences of Discrimination

Sharing experiences of discrimination can be sensitive. This section is designed to help us understand the challenges our staff may face related to discrimination. Your responses will be treated with the utmost confidentiality and will be used to develop strategies to combat discrimination and promote equity within our organization. If this section triggers you or you need support, please take time to care for yourself, use our EAP (Employee Assistance Program) Program, or visit this [resource](#).

*Please note: While your responses will remain confidential if you share an experience that includes specific details that could reasonably identify individuals in an immediate or ongoing threat to the safety or well-being of yourself or others, we may be obligated to follow up in accordance with our duty of care and legal obligations. This is solely to ensure the safety and well-being of our employees and clients.

16) Have you experienced racism while working for this organization?

- o Yes
- o No
- o Prefer not to disclose

17) Do you think the organization's culture reflects an understanding of racism?

- o Yes
- o No

o   Prefer not to disclose

18) Have you experienced sexism while working for this organization?

o   Yes
o   No
o   Prefer not to disclose

19) Do you think the organization's culture reflects an understanding of sexism?

o   Yes
o   No
o   Prefer not to disclose

20) Have you experienced homophobia while working for this organization?

o   Yes
o   No
o   Not applicable
o   Prefer not to disclose

21) Do you think the organization's culture reflects an understanding of homophobia?

o   Yes
o   No
o   Prefer not to disclose

22) Have you experienced transphobia while working for this organization?

o   Yes
o   No
o   Not applicable
o   Prefer not to disclose

23) Do you think the organization's culture reflects an understanding of transphobia?

o   Yes
o   No
o   Prefer not to disclose

24) Have you experienced ageism in the workplace?

o   Yes
o   No
o   Prefer not to disclose

25) Do you think the organization's culture reflects an understanding of ageism?

o   Yes
o   No
o   Prefer not to disclose

26) Please describe any incidents of discrimination (ableism, racism, homophobia, transphobia, ageism, or any other discrimination) that you have experienced or witnessed if you feel comfortable doing so:

_____
_____
_____

27) Do you believe any identities, groups, and or experiences are missing from this survey? Answering these questions will help us improve the scope of this survey.

_____
_____
_____

Section 6: Workplace Culture

This section focuses on your perceptions and experiences related to our workplace culture. We aim to understand how well our organization is doing in fostering an inclusive and equitable environment. Your honest feedback will help us identify areas of strength and areas needing improvement, guiding our efforts to enhance our workplace culture for everyone.

1) *If you answered no to any of the previous questions related to sexism, racism, ableism, ageism, homophobia, or transphobia, can you provide examples or suggestions for how we might improve our organizational culture and understanding in the organization?*

2) *What are some things that you appreciate most about our workplace culture?*

3) *What are some ways we can improve our workplace culture to make it more inclusive and supportive for everyone?*

Thank you for participating in the Survey.

Glossary of Terms:

This glossary of terms is designed to help you understand key concepts related to diversity, equity, and inclusion as they pertain to our staff survey. These definitions provide clarity on important topics such as ableism, accessibility, discrimination, and more. By familiarizing yourself with these terms, you'll gain a better understanding of the language and concepts that are critical to fostering an inclusive and equitable workplace. This knowledge will be useful as you engage with the survey and reflect on how these issues impact our organization.
When your organization is uploading this survey to an online platform, a link with this glossary of terms should be at the beginning of the survey.

Ableism: Ableism refers to prejudiced thoughts and discriminatory actions based on differences in physical, mental, and/or emotional ability, usually that of able-bodied/minded persons against people with illness, disabilities, or less developed skills[1]

Accessibility: Accessibility is the combination of aspects that influence a person's ability to function within an environment and to access it with ease[2]

Ageism: Ageism refers to the stereotypes (how we think), prejudice (how we feel), and discrimination (how we act) towards others or oneself based on age[3]

Aromantic: A person who experiences little or no romantic attraction to others and/or has a lack of interest in romantic relationships/behavior[4].

Asexual: A person who does not experience sexual attraction to people of any gender.

Bisexual: A person who is attracted to people of more than one gender.

Cisgender: A person is cisgender when their gender identity aligns with their sex assigned at birth.

Disability: Any impairment, including a physical, mental, intellectual, cognitive, learning, communication or sensory impairment - or a functional limitation - whether permanent, temporary or episodic in nature, or evident or not, that, in interaction with a barrier, hinders a person's full and equal participation in society.
Discrimination: Discrimination is an action or a decision that mistreats a person or a group for reasons such as race, age, disability, gender etc[5].

Equity: Equity is fairness and justice achieved through systematically assessing disparities in opportunities, outcomes, and representation and redressing [those] disparities through targeted actions.

Fluid: A person who does not identify with the gender binary and move within genders and gender stereotypes.

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[1] **Source: Guide on Equity, Diversity and Inclusion Terminology; *Glossary of Terms: Race, Equity and Social Justice | icma.org1).**

[2] https://cihr-irsc.gc.ca/e/documents/asa_glossary_terms_accessibility_systemic-ableism-en.pdf

[3] World Health Organization: https://www.who.int/news-room/questions-and-answers/item/ageing-ageism

[4] https://www.vanderbilt.edu/lgbtqi/resources/definitions

[5] https://www.chrc-ccdp.gc.ca/en/about-human-rights/what-discrimination

Gay: A person who is attracted to people of the same gender. Can also refer generally to people who are not cisgender or straight[6].

Gender: Socially constructed roles, behaviors, expressions, and identities of girls, women, boys, men, and gender-diverse people. It influences how people perceive themselves and each other, how they act and interact, the distribution of power and resources in society, and people's social, health and economic outcomes.

Gender expression: Gender expression refers to the various ways in which people choose to express their gender identity. For example: clothes, voice, hair, make-up, etc. A person's gender expression may not align with societal expectations of gender. It is therefore not a reliable indication of a person's gender identity.

Gender identity: Gender is how people perceive themselves with respect to their gender. Gender identity is not confined to a binary (girl/woman, boy/man) nor is static; it exists along a continuum and can change over time. There is considerable diversity in how individuals and groups understand, experience and express gender through the roles they take on, the expectations placed on them, relations with others and the complex ways that gender is institutionalized in society.

Gender equality: Gender equality refers to equal rights, responsibilities and opportunities for women, men and non-binary people. Equality refers to the state of being equal while equity refers to the state of being just, impartial or fair. However, equality of opportunity by itself does not guarantee equal outcomes for women, men and non-binary people.

Gender equity: Gender equity refers to fairness, impartiality and justice in the distribution of benefits and responsibilities between women, men and non-binary people. Unlike gender equality, which simply provides for equality of opportunity, gender equity explicitly recognizes and actively promotes measures to address historical and social disadvantages. By 'levelling the playing field,' gender equity creates circumstances through which gender equality can be achieved. Gender equity means providing all social actors with the means to take advantage of equality of opportunity.

Gender non-conforming: Someone whose gender identity and/or gender expression expands beyond, actively resists, and/or does not conform to the current cultural or social expectations of gender, particularly in relation to male or female[7].

Homophobia: Feelings of hatred, fear, and/or disdain for people that are not heterosexual[8].

Intersectionality (WAGE Definition): A theoretical approach that acknowledges that our lives are shaped by multiple, overlapping or intersecting identity factors (e.g., race, class, gender), which results in unique, and complex lived experiences that impact how we experience federal policy, programs, and legislation. Compounding discrimination based on identity factors can create barriers for some or opportunities for others.

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[6]https://www.ourspectrum.com/wp-content/uploads/2023/05/2SLGBTQIA-Terminology-and-Media-Reference-Tool.pdf

[7] https://itgetsbetter.org/glossary/gender-nonconforming/

[8]2SLGBTQIA+ Terminology Guide and Media Reference Tool

Intersectionality : Intersectionality is a metaphor for understanding the ways that multiple forms of inequality or disadvantage sometimes compound themselves and create obstacles that often are not understood among conventional ways of thinking.

Lesbian: A woman who is attracted to a woman

Lived Experience[9]**:** This is an important form of expertise that recognizes that people with life experiences related to social identity have a deeper knowledge of its strengths, challenges, and opportunities. Life experiences combined with professional expertise can benefit societies and communities when they inform design, programming, and policy decisions.

Non-Binary: A person whose gender identity does not fall within the binary genders of man or woman

Organizational Culture: Organizational culture is the collection of shared values, beliefs, attitudes, and practices that shape how people behave and interact within an organization. It's the "personality" of a company, encompassing everything from the way employees communicate to the unwritten rules about how work gets done. This culture influences how decisions are made, how employees are treated, and how the organization presents itself to the outside world.

Pansexual: A person who experiences sexual, romantic, physical, and/or spiritual attraction for members of all gender identities/expressions.

Queer: Historically a slur, reclaimed by some people that do not identify as cisgender and/or straight.

Questioning or unsure: An individual who is unsure of and/or exploring their gender identity and/or sexual orientation.

Racism: The discrimination and prejudice of someone based on their race or ethnicity; racism requires societal/systemic oppression[10].

Same-gender-loving: A term some prefer to use instead of lesbian, gay or bisexual to express attraction to and love of people of the same gender[11].

Sexism: Discrimination and prejudice against someone of a certain sex.

Sex: Refers to a set of biological attributes. It is primarily associated with physical and physiological features, including chromosomes, gene expression, hormone levels and function, and reproductive/sexual anatomy. Sex is usually categorized as female or male, but there is variation in the biological attributes that comprise sex and how those attributes are expressed.
Sexual orientation: A term used to describe a person's emotional, romantic, or sexual attraction.

Straight (Heterosexual): A person who experiences sexual, romantic, or emotional attraction with a member of the opposite sex or gender.

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[9] OCASI, Anti-Racism and Anti-Oppression Framework Glossary

[10] OCASI, National Accessibility Toolkit Access in Action Toolkit.pdf

[11] https://www.hrc.org/resources/glossary-of-terms

Transphobia: Feeling hatred, fear, or [12]disdain for transgender people.

Transgender: a person whose gender identity and/or biological characteristics differs from the sex they were assigned at birth.

Two-Spirit: a culturally-specific gender identity. 2S people serve an integral role in Indigenous communities. We place 2S at the beginning of initialism to recognize Indigenous people as the first to build gender-diverse communities in Canada.

Oppression: Is the unjust use of power to disempower, marginalize, silence or otherwise subordinate specific groups or categories, often in order to further empower and/or privilege the oppressors.
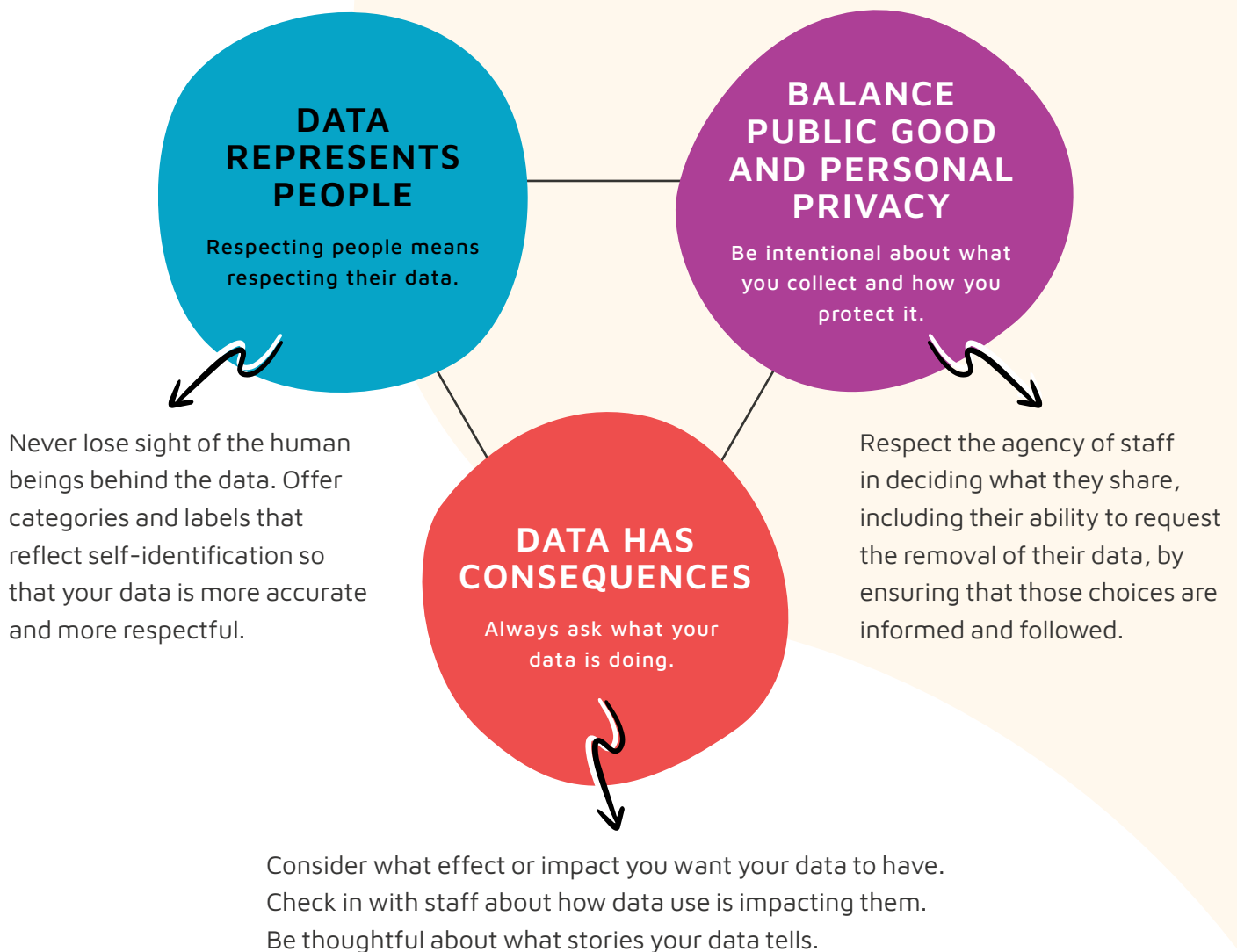
Racism: is an ideology and system of beliefs wherein distinctive attributes are evaluated relating to ideas of inherent superiority and inferiority. It is the act whereby one group of individuals exercises power over another group based on skin colour based on a set of actions, erroneous assumptions and implicit or explicit beliefs. Racism manifests within organizational and institutional structures, programs, and individual attitudes, thoughts, or behaviour patterns [1].

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[12] 2SLGBTQIA+ Terminology Guide and Media Reference Tool

WORKING WITH STAFF DATA

Data equity is an important framework guiding the data process through a lens of justice, equity, and inclusivity. This framework helps to critically examine how data is collected, analyzed, interpreted, and distributed by asking questions about power, bias, and discrimination to understand how data affects different groups of people. Data equity is explored in more detail in the GBA Plus Data Management Strategy Guide *[forthcoming]*, but these key principles are a good starting point.

DATA REPRESENTS PEOPLE

Respecting people means respecting their data.

BALANCE PUBLIC GOOD AND PERSONAL PRIVACY

Be intentional about what you collect and how you protect it.

DATA HAS CONSEQUENCES

Always ask what your data is doing.

Never lose sight of the human beings behind the data. Offer categories and labels that reflect self-identification so that your data is more accurate and more respectful.

Respect the agency of staff in deciding what they share, including their ability to request the removal of their data, by ensuring that those choices are informed and followed.

Consider what effect or impact you want your data to have. Check in with staff about how data use is impacting them. Be thoughtful about what stories your data tells.

Analyzing data is all about answering questions, so the first step in any analysis is determining what questions you want your data to answer. It can also be helpful to look at the process as a kind of storytelling opportunity – as your data answers your questions, it begins to tell a story. Decisions about how you frame that story, such as the language you use, affect how that story impacts those who read or hear it, so be intentional and always be on the lookout for bias. Any mechanisms you have in place to protect and respect the data of clients should be considered for staff data as well.

Mind the Gaps

If you are seeing a pattern in questions being skipped or answered with "prefer not to disclose," that's a sign that your agency may need to develop a more inclusive environment for staff with those identities. The same goes for reporting discrimination—maybe those empty responses mean your agency is amazing, but maybe they actually represent places that need work. Making staff surveys an annual event can help track that progress.

GBA Plus

Building a data story means showing relationships. That requires **collating** data to line up responses next to each other and **disaggregating** data to find differences. How many microaggressions do staff of color experience compared to white staff?

Disaggregation is how you separate groups for comparison. It's also key to conducting GBA Plus analysis—if you do it for your clients, consider doing it for your staff!

GBA Plus Readiness and Capacity Survey Template

araisa

Establishing a Baseline Understanding of Staff Readiness and Capacity to Implement GBA Plus

Establishing a baseline understanding of your staff's current level of readiness and capacity to integrate GBA Plus is an essential step as it allows you to gauge what topics, concepts, and terminology associated with GBA Plus that staff are already familiar with and comfortable applying in their day-to-day work. Even if GBA Plus is a new approach for your organization, staff may already possess valuable knowledge of related approaches and concepts (e.g. intersectionality, equity, diversity, inclusion, anti-racism, anti-oppression, etc.) that you can use as a starting point for introducing GBA Plus.

The foundational elements of GBA Plus—in particular, intersectionality—have played a central role in service and program delivery for newcomers across the settlement sector for some time. Connecting the existing experiences staff have with this type of work to the goals of GBA Plus can help integrate the approach within your organization in a meaningful way.

Gathering a baseline reading from staff will also allow you to identify gaps in staff knowledge around GBA Plus, which can be used to design and implement a training plan to address these areas. Gathering staff input on their capacity to integrate, or further integrate, GBA Plus into their work is equally important. Knowing what resources are in place to support this work, and those that still need to be put in place, allows you to develop a clear plan for moving forward.

There are many approaches that you can take to gather this information. Depending on the size of your organization, you could conduct informal focus groups to solicit input or speak to employees one-on-one. Staff surveys are a particularly efficient, and anonymous, method to gather this data (see below for a Staff GBA Plus Readiness and Capacity Survey Template that can be tailored to your organization and administered through SurveyMonkey or Microsoft Forms). You could also use multiple methods to gather information from staff depending on the size and capacity of your organization.

Whatever method you choose, you should plan to gather similar feedback from employees over time to gauge how GBA Plus knowledge and capacity increases and to further identify areas that may still need to be addressed through professional development opportunities. Similarly, this feedback can identify any challenges or barriers, especially related to resources and capacity, that staff are experiencing so that these can be addressed.

The survey covers a wide array of organizational activities including policy, programming, reporting, and training. Once the survey has been completed you will be able to use the results to focus your efforts to enhance and build GBA Plus capacity in your organization. If the staff responses for the GBA Plus knowledge section identify that more training is required to more fully integrate GBA Plus into their daily work within the organization then you can prioritize providing this training for employees. This may entail emphasizing existing training opportunities within your organization that employees may not be aware of or offering new training opportunities on this subject matter. Addressing any knowledge or capacity gaps identified in the survey will ensure that the other organizational areas covered such as policy, programming, and reporting, are strengthened, and as a result staff will be better equipped to apply this analytical approach to their work. Administering this survey on a quarterly or yearly basis will allow you to track improvement in staff capacity over time and allow you to continue to identify gaps or challenges being faced by employees in integrating GBA Plus into their work so that you can address them as an organization.

Staff GBA Plus Readiness and Capacity Survey Template

Survey Introduction

According to WAGE (Women and Gender Equality Canada) (2023), Gender-Based Analysis Plus (GBA Plus) "is an intersectional analysis that goes beyond biological (sex) and socio-cultural (gender) differences to consider other factors, such as age, disability, education, ethnicity, economic status, geography (including rurality), language, race, religion, and sexual orientation." [1]

Your participation in this survey is crucial in helping to gain a comprehensive baseline understanding of the levels of GBA Plus knowledge and capacity within [organization name's] operations – including both gaps and opportunities for integrating GBA Plus into [organization name's] work. Your responses will remain confidential and will be used for research purposes only.
The survey should take approximately 10 – 15 minutes to complete.

Thank you for taking the time to complete this survey.

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1. Women and Gender Equality (WAGE) Canada, 2023. What is Gender-based Analysis Plus. Available at: https://www.canada.ca/en/women-gender-equality/gender-based-analysis-plus/what-gender-based-analysis-plus.html (accessed 13 May 2024).

Survey Questions

*Required

General Knowledge of GBA Plus and Associated Concepts and Terminology

1. How long have you been employed at [organization name]? *

- 0 - 6 months
- 6 months - 1 year
- 1 year - 2 years
- Over 2 years

Please note that if you are a smaller organization, you may want to consider omitting this question as it may limit or compromise anonymity.

2. How familiar are you with the concept of Gender-based Analysis Plus (GBA Plus)? *

- Very familiar
- Familiar
- Somewhat familiar
- Somewhat unfamiliar
- Not familiar at all

3. How familiar are you with the following terms and concepts?

	Very Familiar	Familiar	Somewhat Familiar	Somewhat Unfamiliar	Not Familiar
Equity					
Intersectionality					
Anti-Racism					
Anti-Oppression					

	Very Familiar	Familiar	Somewhat Familiar	Somewhat Unfamiliar	Not Familiar
Diversity, Equity, and Inclusion (DEI)					
Feminism/ Feminist					
BIPOC/ Racialized					
Accessible/ Accessibility					
Universal Design					
Accommodation					
Translate/ Translation					

	Very Familiar	Familiar	Somewhat Familiar	Somewhat Unfamiliar	Not Familiar
2SLGBTQIA+					
Gender-Based Violence					

4. Have you received any training or education on GBA Plus, or related concepts, whether in your role at [organization name], or prior to joining the organization? *

- Yes - a lot of training
- Yes - a fair amount of training
- Yes - a bit of training
- No training

5. If you have received GBA Plus training, please provide additional details (e.g., the name of the course(s), hours of training received, etc.) below.

6. What level of training is available to staff on GBA Plus, or related concepts, such as equity, diversity, and inclusion (EDI) and intersectionality? *

- None
- Minimal - Basic concepts covered
- Moderate - Key concepts covered, but not comprehensive
- Significant - Broad range of GBA Plus-related topics covered
- Extensive - Comprehensive curriculum covering GBA framework and its integration into [organization's] operations

Gauging The Levels of Readiness and Capacity to Integrate GBA Plus into [organization name's] operations

7. To what extent do you feel prepared to implement GBA Plus within the work that you do at [organization name]? *
- Very prepared
- Somewhat prepared
- Not very prepared
- Not prepared or comfortable at all

8. Do you feel like you would require additional information and training on GBA Plus to have the capacity to fully integrate it into your work? *
- No, I do not feel that additional information and training is necessary
- Yes, I do feel that some additional information and training is necessary
- Yes, I feel that a lot of additional information and training is needed

9. Are there any specific information, tools, or support that you feel you will require to apply GBA Plus to your work? *

Employee Perceptions of the Importance and Relevance of GBA Plus to [organization name's] Work

10. Do you think that GBA Plus is relevant and important to the settlement sector in [province or region your organization is located in]? *
- Yes, it is highly relevant and important
- Yes, it is somewhat relevant and important
- No, it is not relevant and important

11. Do you think that GBA Plus is relevant and important to the work that [organization name] does? *
- Yes, it is highly relevant and important
- Yes, it is somewhat relevant and important
- No, it is not relevant and important

12. If you answered that GBA Plus is relevant and important to the settlement sector in [province or region your organization is in] (Question 10), and/or relevant and important to work that [organization name] does (Question 11), please explain why you feel this way. Please be as specific as possible.

Operations, Programming, Evaluation, and Reporting

13. To what extent do you feel that GBA Plus is currently integrated into [organization name's] organizational practices? *
- Fully integrated
- Partially integrated
- Not integrated
- Unsure

14. To what extent do you feel that GBA Plus informs decision-making at [organization name]? *
- Fully informs decision-making
- Somewhat informs decision-making
- It does not inform decision-making
- Unsure

15. Is GBA Plus incorporated into your program evaluation and reporting procedures? *
- Fully incorporated
- Partially incorporated
- Not incorporated
- Unsure
- Not applicable

16. Do you collect gender-disaggregated data as part of your program reporting? *
- Yes
- No
- Unsure
- Not applicable

17. Do you collect data disaggregated by any other social identities (e.g. race, age, sexual orientation, disability)
- Yes
- No
- Unsure
- Not applicable

18. Does your organization work in partnership with any community-based organizations that serve under-represented and equity-seeking groups, whether within or external to the newcomer-serving sector?

- Yes, my organization regularly works in partnership with these types of community-based organizations
- Yes, my organization occasionally works in partnership with these types of community-based organizations
- No, my organization does not work in partnership with these types of community-based organizations
- I'm not sure if my organization works in partnership with these types of community-based organizations

Challenges, Opportunities, and Additional Thoughts

19. Are there any challenges or limitations to integrating GBA Plus into [organization name's] operations that you can think of (whether within your work at [organization name], or the organization more broadly)? Please be as specific as possible. *

20. Are there any opportunities that you can think of to integrate GBA Plus into your work and/or the work of [organization name] more broadly? *

21. Please share any additional thoughts, suggestions, or comments related to integrating GBA Plus within [organization name's] operations. *

Organizational Strategies for Implementing GBA Plus

ii. EQUITABLE DATA COLLECTION AND MANAGEMENT

GBA Plus and Data Equity

EXPLORING DATA NARRATIVES

Land Acknowledgement

We acknowledge that this presentation takes place across Turtle Island, which are the traditional lands of Indigenous Peoples. The land that we now call Canada, from coast-to-coast-to-coast, has been stewarded by Indigenous Peoples since time immemorial and as we gather today, we pay respect and gratitude to the traditional caretakers and guardians of the land. These lands are either subject to First Nations self-government under modern treaty, unceded and un-surrendered territories, or traditional territories from which First Nations, Métis, and Inuit Peoples have been displaced.

This workshop was developed as part of the Enhancing National Sector Gender-based Analysis Plus (GBA Plus) Capacity Project

The objectives of the Enhancing National Sector GBA Plus Capacity project is to test an approach to enhance the capacity of the project partners to mainstream gender equality and Gender-based Analysis Plus (GBA Plus) within their own organizations, and to develop settlement sector guidance drawing on that experience.

Funded by:

Grounded Engagement

Objectives

- o Increase understanding of GBA Plus and its relationship to data
- o Enhance confidence in applying GBA Plus and data equity to active work through data narratives
- o Generate takeaways to carry over into practice

Agenda

1. Overview of GBA Plus and data equity
2. Exploration of relationship between data and equity
3. Case study
4. Workshop: applying GBA Plus and data equity

Principles

- o There are no experts here
- o We desire understanding and growth
- o We are open
- o We speak for ourselves
- o We respect personal experience

Data matters

Data is used to:

o Describe the work being done

- Report to funders and communities

o Evaluate programs

- Meeting need vs. gaps

o Support evidence for anecdotal data

Data can also:

o Validate our knowledge

o Challenge our assumptions

o Empower communities

o Silence or strengthen voices

GBA Plus and Data Equity

- Although originally focused only on gender, Gender-Based Analysis Plus (**GBA Plus**) now encourages **intersectional analysis** to examine how identity factors like age, gender, race, education, and many others interact to affect the ways policies, programs, and practices affect diverse groups of people.

- This analysis is used to design new policies and/or adjust existing ones in order to ensure equity in access and outcomes.

- To do intersectional analysis, you need the right kind of data - disaggregated data.
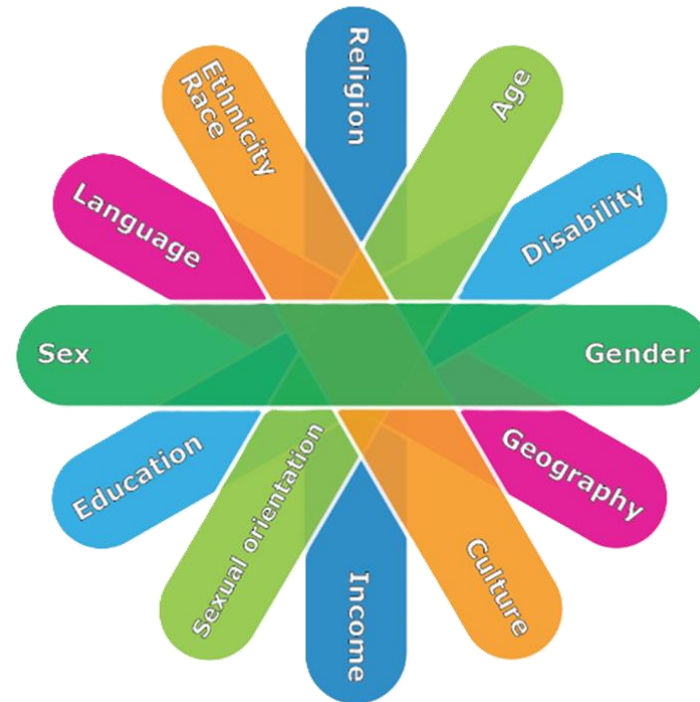
- **Data equity** examines how data is collected, analyzed, interpreted, and distributed through a lens of justice, equity, and inclusivity using questions about power, bias, and discrimination.

- It considers the impact of data on key functions such as program and policy development, funding, and program impacts.

- It asks how data affects different groups of people and how data practices can both drive more equitable solutions and be more equitable themselves.

GBA Plus in Practice: LINC withdrawals

Identify the issue: Withdrawal rates from LINC classes

Challenge assumptions: Look at your data to see *who* is withdrawing
- Trans women
- Caretaking parents in the summer

Research and consult: Is there research on trans women and/or parents in language classes?
- Trans women are experiencing hostile environments caused by fellow students
- Caretaking parents are withdrawing due to lack of childcare in summer

Develop options & make recommendations:
- Dedicated classes for LGBTQIA+ students
- Childcare or remote learning options for parents

Monitor & evaluate: Check the numbers for changes to determine success

COMMUNICATE

IDENTIFY ISSUE

CHALLENGE ASSUMPTIONS

GATHER THE FACTS—RESEARCH AND CONSULT

DEVELOP OPTIONS & MAKE RECOMMENDATIONS

MONITOR & EVALUATE

DOCUMENT

EXCELLENT RESULTS FOR DIVERSE CANADIANS

*Graphic drawn from Women and Gender Equality Canada's Introduction to GBA Plus online course*

https://women-gender-equality.canada.ca/gbaplus-course-cours-acsplus/eng/mod03/mod03_03_02.html

Equitable data practices have equitable impacts

DATA FOR EQUITY

- Build equity on a data foundation
- Many kinds of data all work together
- Data for equity requires *collating* and *disaggregating*
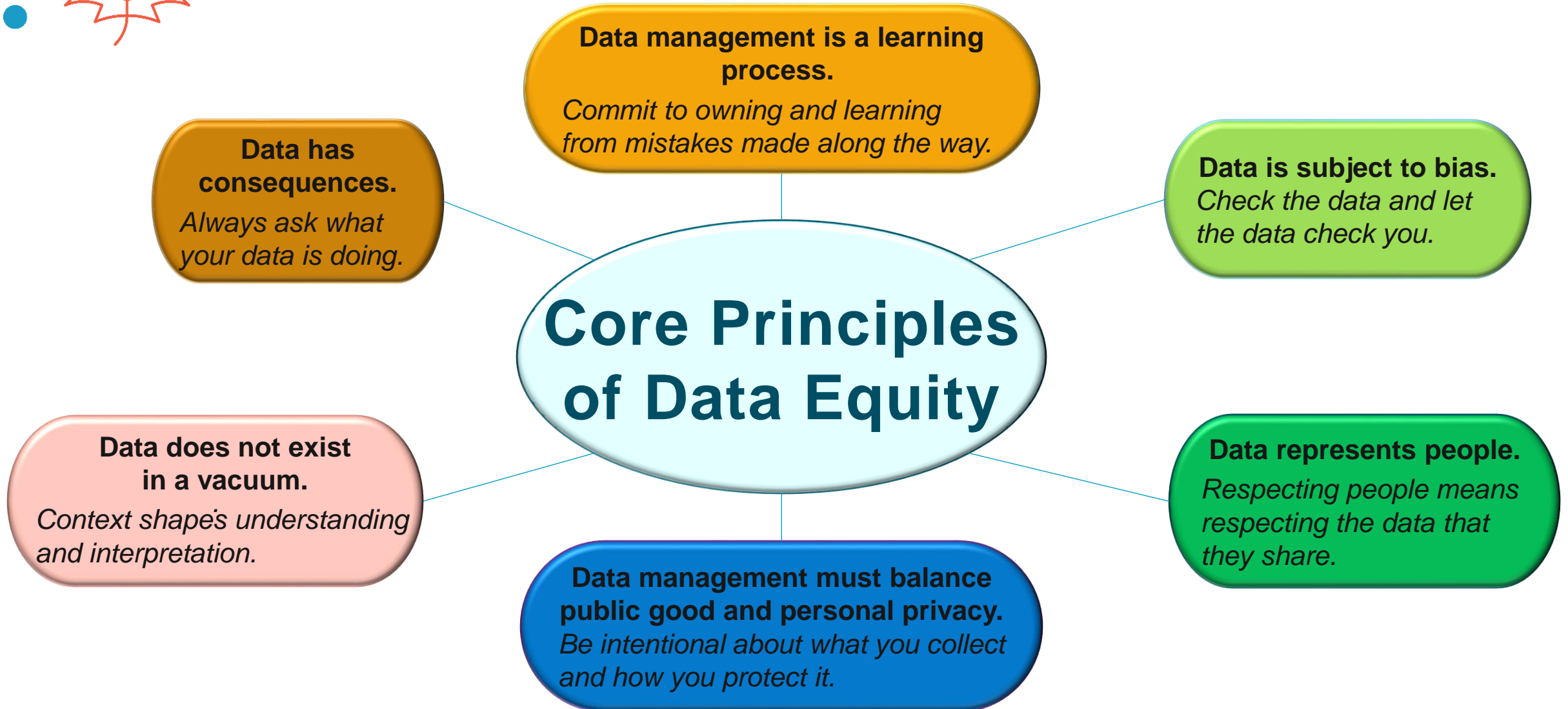- Data builds a picture that enables strategic and intentional decision-making
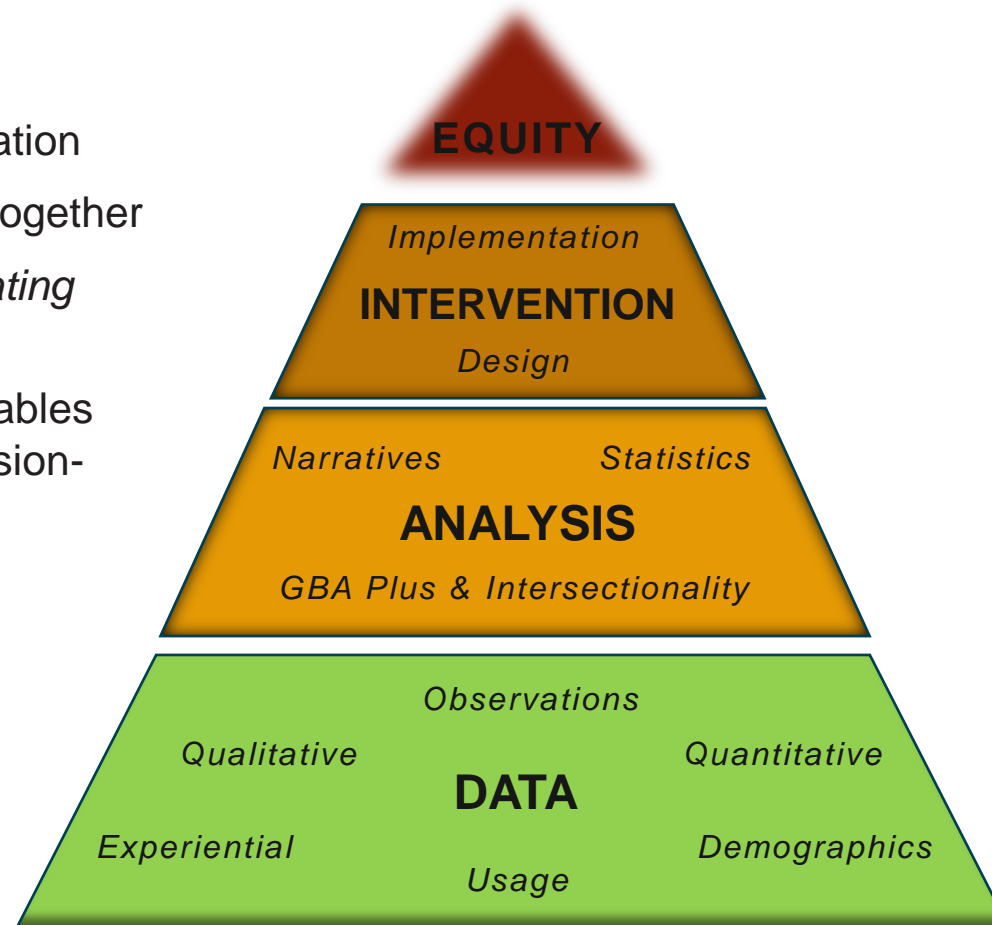
EQUITY FOR DATA

- Equitable organizations require equitable foundations.
- Data processes need to be transparent, accountable, and engaged
- Understand what data does and for/with/to whom
- Recognize the humans behind the data

EQUITY

Implementation
INTERVENTION
Design

Narratives   *Statistics*
ANALYSIS
GBA Plus & Intersectionality

Observations
Qualitative   *Quantitative*
DATA
Experiential   *Demographics*
Usage

Equity is a process, not an achievement

What resonates with you?
What surprises you?

Core Principles of Data Equity

Data management is a learning process.
Commit to owning and learning from mistakes made along the way.

Data has consequences.
Always ask what your data is doing.

Data is subject to bias.
Check the data and let the data check you.

Data does not exist in a vacuum.
Context shapes understanding and interpretation.

Data represents people.
Respecting people means respecting the data that they share.

Data management must balance public good and personal privacy.
Be intentional about what you collect and how you protect it.

Data Narrative Framework: *Data is about telling a story*

- What is your story **about**?
- What is its **purpose** or goal?
- Who is your **audience**?
- What **evidence** speaks to that audience?
  - What sort of **analysis** is needed to create this narrative?
  - What **data** is needed to conduct that analysis?
  - What data do you already have, and what do you need to build?
- **Whose** story are you telling?
- **How** are you sharing this story?

Data Narrative Framework: Locating equity in data narratives

- How might this narrative affect clients?
    - Who is empowered by this narrative?
    - Which voices may be going unheard?
- How can this narrative be framed for empowerment?
    - Move away from deficit framing.
    - Can you engage clients in defining "success?"
- How else can this narrative be shared?
    - Are there formats, mechanisms, or avenues where this narrative could give back to the community?

Case study: Building the story

Your organization is expected to report to a funder on LINC program use.

Whose story are you telling?

What is the **subject** of this story?	What is the **purpose** of this story?	Who is the **audience** of this story?	What **evidence** will this audience find compelling?	What kind of **analysis** will you need to conduct?	What **data** will you need to conduct this analysis?	**How** are you sharing this story?
LINC program • Successes • Challenges • Opportunities	Maintaining funding? Expanding funding? Advocacy? Intervention?	**The funder** Other potential audiences? How are you choosing?	**Quantitative** • Uptake • Completion • Satisfaction **Qualitative** • Testimonies • Success stories	**Quantitative** • Statistical • Client profile • *GBA Plus* **Qualitative** • Illustrate • Validate	**Quantitative** • Enrollment • Completion • Demographic • *Disaggregation* **Qualitative** • Surveys • Focus groups	**Format** Report? Infographic? Presentation? Video? **Venue** Website? Event?

Case study: Incorporating equity

How can data equity be incorporated into this process?
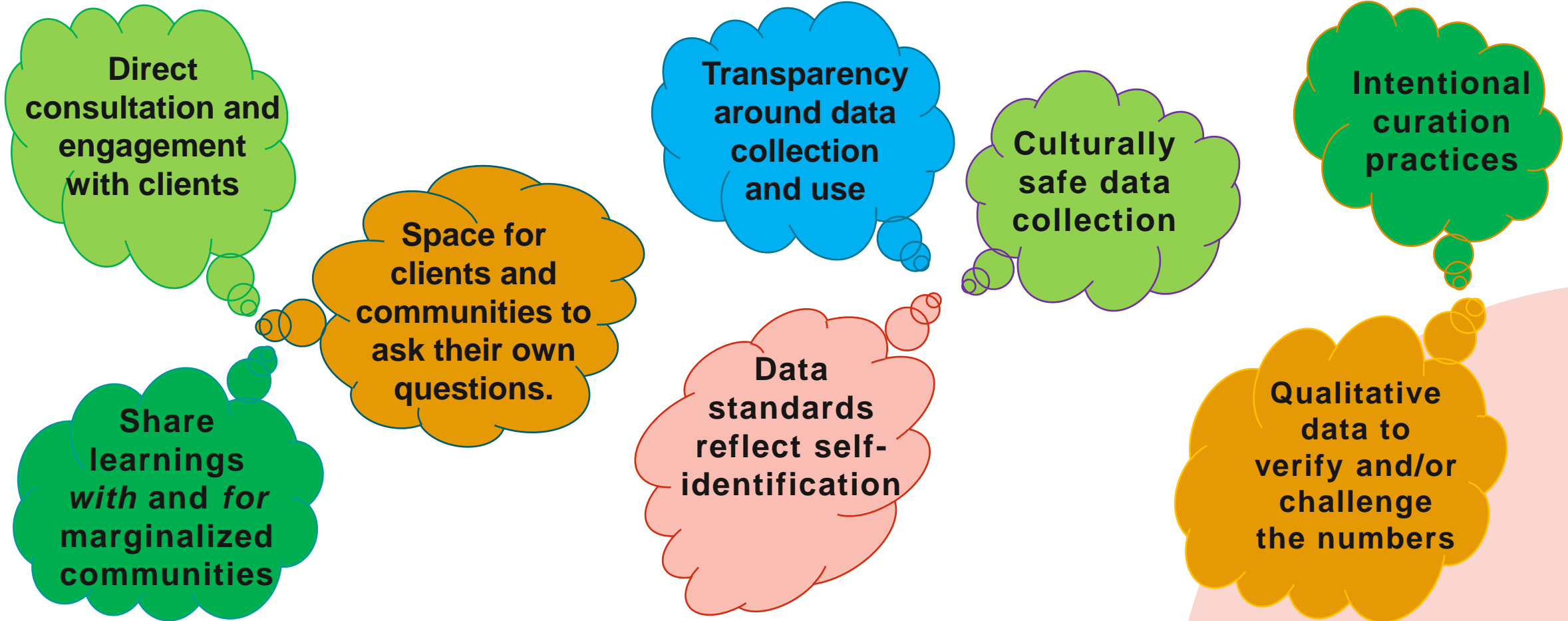
Break!

Take 5 minutes for self-care and reflection
Come back ready to apply data narratives to your work

Discussion

Separate into pairs or small groups. Take 15 minutes to discuss the following questions:

What stories do you want to tell about the work you do?

What do you need to know to tell those stories?

Where and how can data equity principles be integrated into the process of telling these stories?

| What is the **subject** of this story? | What is the **purpose** of this story? | Who is the **audience** of this story? | What **evidence** will this audience find compelling? | What kind of **analysis** will you need to conduct? | What **data** will you need to conduct this analysis? | **How** are you sharing this story? |

Come back ready to share your thoughts

Reflection

Consider the following questions. You can share your thoughts in three ways: Raise your hand to share your thoughts aloud with the group; write your thoughts on the sticky notes provided at your table; or use the QR code to answer these questions through the feedback survey.

Did you find the data narrative model helpful?

How did using the model affect how you think about or approach your work?

Where do you want to incorporate more intentional use of data in your work?

How confident do you feel about bringing GBA Plus to your work? How about data equity?

What support and resources would be most helpful to enhance the development of data narratives in your work?
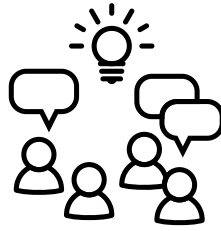
Workshop: GBA Plus and Data Narratives

Purpose

This workshop is designed to increase understanding of the role data plays in GBA Plus and equity work through the concept of data narratives. It is intended to build both knowledge and confidence around employing data in the pursuit of equity while incorporating key principles of data equity. Therefore, this workshop begins with an overview of the importance of data, the concepts of GBA Plus and data equity, and their role in driving equity-focused work, including a grounding in core principles of data equity.

This conceptual grounding is followed by an exploration of data narratives, including subject, audience, and evidence, and an examination of data equity framed by its impact on clients and their communities. Following a case study example for constructing a data narrative, it opens space for participants to explore the possibilities for data narratives in their current work.

Resources

You may choose to make use of additional resources as part of facilitating this workshop.
- The Data Narratives Workshop Introduction is a one-page document providing a brief introduction to concepts covered in the workshop. This can be a beneficial pre-read for participants.
- The Data Narratives Workshop Worksheets provide a structured space for participants to record their thoughts as they outline their own data narratives.

Outline

Speaking notes for each slide are provided alongside the relevant slide, in the "Notes" section of the deck.

This workshop is expected to take 1-1.5 hours. The listed times are estimates; based on where your organization is currently at in the GBA Plus, data, and equity processes and your assessment of the knowledge base held by participants, explanatory slides may require additional depth. Alternately, some of the concepts may be familiar to participants, and more time can be allocated to the workshop portion.

Topic & Objectives	Slides	Estimated Time
Welcome and Housekeeping **Territorial & Funder Acknowledgements** *Substitute the territorial acknowledgment slide with one appropriate for the venue in which the workshop is taking place.*	1-3	2 min
Grounded Engagement: Objectives, Agenda, Grounding Principles *Use this slide to discuss workshop logistics and methods for engagement. Encourage the use of notepads or sticky notes for in-person delivery and the chat or Q&A functions for virtual delivery. Ensure there is active recording of thoughts destined for the parking lot – it can be very helpful to follow up on the workshop with acknowledgment of the ideas that arose from it. You may replace the principles for engagement with ones used by your organization.*	4	5 min
Introduction: Data matters *Introduce the importance of data and the roles it plays (or can play) in the organization. Prepare 2-3 examples of data usage within the organization, such as usage statistics for funder reporting, or client survey data used for journey mapping. Consider how the use of this data impacts the organization in general and the teams, departments, or staff present for the workshop.* *Pause on Slide 6 to give participants time to consider and express how they see data integrating into their work. This can include both using data (such as through analysis or reporting) and collecting or gathering data, through intakes, case notes, or other mechanisms.*	5-6	1 min intro 2 min answers

Key Concepts: GBA Plus and Data Equity *Use the concept of intersectionality to guide an overview of how data supports GBA Plus and the importance of equity when working with data.* *Pause on Slides 8 and/or 10 to give participants a chance to ask questions about the concepts covered.*	7-10	2 min per slide/8 min total 2 min questions
Exploring data narratives Introduce participants to data work as a form of storytelling using the concepts of subject, purpose, audience, and evidence. Guide participants through the role data equity plays in constructing these narratives. *Pause on slide 12 to check comprehension before continuing on to the example.*	11-12	5 min
Example/case study: *Pause to solicit suggestions about the subject, purpose, audience, and evidence (click-to-continue animation is included in the slides).* *Note the importance of disaggregated data for discovering **who** may be going unheard or facing additional barriers or challenges.* *On slide 14, pause to collect responses, then use click-through animations to explore related areas for integrating data equity.* *After covering slide 14, you may pause for questions.*	13-14	6 min slides 2 min questions
Break: *Take a 5-10 minute break before diving in to the workshop portion.*	15	5 min
Workshop: Building data narratives for current work *Encourage groups to record their thoughts and to place ideas that diverge or go beyond the scope of this workshop into the parking lot. Consider preparing a list of potential or identified subjects or objectives currently facing the organization to share with groups. You can offer an option from the list to groups who are struggling to come up with their own, assign a gap to each group, or just offer the list to all and allow each group to select from it. It is possible for more than one group to explore the same gap – they may come up with very different answers.*	16	3 min to introduce 10 min for small groups 10 min to share back

Reflection *Consider using the nonverbal participation suggestions below to support engagement. Record feedback and thoughts.* *Include a link to an evaluation survey (if you are using one) on this slide. The QR code currently on this slide is for an AMSSA evaluation survey.*	17	10 min
Conclusion, thanks, farewell *You may add or substitute a slide with a link or QR code for participants to evaluate the workshop and provide feedback.*	18	1 min

A few tips for facilitation
Consider accessibility. Is the (physical or virtual) venue for the workshop accessible to folks with a variety of physical, mental, or sensory needs? Is it in a space that is welcoming to people of all identities? Are there mechanisms encouraging accommodations for those with needs not being met? Does it have loud or especially bright lights that could contribute to sensory overload?

Sensory and psychological needs
While the content of this workshop is intended to support psychological and cultural safety, even in the most carefully cultivated environment individuals may need to retreat to care for their own well-being. A variety of causes may lead to this need, so ensure participants have access to a quiet space to care for themselves. Include directions for accessing this space, and the value of self-care, when discussing the Grounded Engagement slide (4).

Anonymous participation
Not all participants will always be comfortable speaking up. Encourage the use of sticky notes to record thoughts for in-person workshops and the chat/Q&A functions for virtual ones. Zoom Q&A allows participants to ask questions anonymously.

For in-person workshops, consider periodically collecting sticky notes, or encouraging participants to put their written questions on a dedicated surface, such as a poster sheet or section of the wall. Check those notes for questions and insights that can be shared with the group.

For virtual workshops, consider having a designated assistant who can receive and read direct messages from participants, and/or make sure the Q&A function allows for anonymous submissions.

Nonverbal participation
As an alternative to expecting participants to speak up, consider using nonverbal check-ins. A show of hands – up for agreement, down for disagreement, flat for neutrality – or using fingers to rate a statement from one to five can help to engage and include participants who are uncomfortable speaking up.

For virtual facilitation, you may ask participants to share a number (1-5) in the chat rating their understanding, confidence, or other statement.

Example: Ask participants to raise their hands if they feel they understand a concept; those who are unsure can hold their hands out horizontally instead of raising them vertically.

Agree:

Unsure:

Example: Ask participants to rate their confidence employing a new concept or skill from one (not at all confident) to five (very confident) by holding up that many fingers.
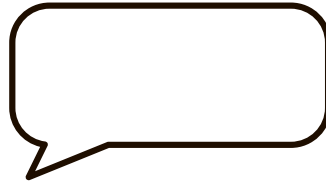
GBA Plus and Data Narratives Workshop: Slide Notes

Slide 1: n/a

Slide 2: [Replace with the territorial acknowledgment used by your organization.]

Slide 3: n/a

Slide 4:
[Speaker may include 1-2 goals you have for participants][Principles may be modified to reflect those used at your organization]

Practices
- Periodic pauses for questions
- Parking lot for tangential questions

Logistics
- Encourage use of sticky notes (in-person) or chat/Q&A function (virtual) for folks to record their thoughts.
- Consider saving the meeting chat and reviewing comments after the workshop's conclusion.

Slide 5:
Data *matters*.

Data is how you know who you're serving and how well you're serving them, through client files, program outcomes, and other metrics.

Data is both how you prove what you know and how you challenge what you know. It plays a key role in organization functions and activities like program and policy design

and development, funding, and reporting – data is everywhere. For something that central, with so many possible impacts, it is essential to pay attention to building in and monitoring equity in data practices, just as in hiring, services, and other program areas.

Note: Anecdotal data is based on stories, such as what staff learn or observe by interacting with their clients. It is different from quantitative data or data derived from formal surveys or focus groups and is used in different ways.

Slide 6:
Data work can include both the deployment or analysis of data as well as gathering and collecting data. Many staff will work at one end of the process, such as in client intakes, but almost all staff are interacting with data in some way.

[Use the responses to this slide to guide participants to a clearer understanding of both the role they play in data processes as well as the role data plays in the organization. When participants share where they work with data, follow up with a question about that work – how do they feel about their role in that process? What is most challenging or rewarding?]

Slide 7:
- Gender-based analysis plus (GBA Plus) is an analytical framework for examining how diverse groups access, experience, and benefit from policies, programs, and practices.
- Initially, it only examined the role gender played. While it now acknowledges other identity factors through the "Plus" in "GBA Plus", it is important to be intentional about examining diverse intersecting factors and to move away from an additive model where gender is the first and foremost unit of analysis.
- To do so, engage in intersectional analysis to see how identity factors like age, gender, race, education, and other factors interact to affect the ways policies, programs, and practices affect diverse groups of people.
- This analysis is then used to design new policies and/or adjust existing ones in order to ensure equity in access and outcomes.
- Remember: analysis requires data to analyze. To perform intersectional analysis, you need intersectional data – in this case, disaggregated data.

Data equity is the principles and practices through which we engage with data. We have a responsibility to treat clients' data with the same respect we extend to their persons.

What are some identity factors that play a role in your clients' experiences?

Slide 8:
[If your organization has enacted recent interventions using this model, consider adapting that process as the example for this slide.]

Data helps to identify issues. For instance, you might notice higher rates of withdrawal from LINC classes during the summer months. Identify this as the issue.

Data can help challenge assumptions when it contradicts biases, so look at the data you have to challenge the assumptions you might carry – who do you assume is withdrawing and why? Use disaggregated data to find out who is leaving classes.

Then gather the facts – consult with those clients to find out why they're withdrawing (this is a form of qualitative data).

Use that information to develop targeted and strategic recommendations and interventions. It is a good idea to use an equity framework such as IDEA to ensure that these interventions are designed and implemented in an equitable way.

Finally, compare data from before and after these interventions to check their effectiveness. Do withdrawal numbers change? You may repeat this process to refine these interventions or design new ones.

Slide 9:
This pyramid shows how data provides the foundation for analysis, which guides interventions designed to improve equity. This is a two-way street – Data is used to work toward equity, but equity also has to inform practices around data.

Locating data *in* equity (moving from the top of the pyramid down to the base)
- Equity depends on creating justice-driven opportunities and supports through targeted interventions.
- Data-informed interventions address the specific needs of diverse groups.
- This requires finding relationships by analyzing or examining data.
- That data comes in many different forms, from service use statistics to staff observations to lived experience.

Locating *equity* in data
- Data equity guides data processes toward transparency, accountability, and engagement.

- Equity is built from
  - Intersectional awareness
  - Humanized data, respecting people and context
  - Openness about processes
  - Commitment to learning and growth

Slide 10:
[Pause at the end of this slide for questions]

Data equity is a broad concept, but here are some core principles to guide your work with data. Use these as a starting point and build your own equity-driven data practices based on how these principles intersect with the work you're doing.

Data management is a learning process
- Data equity is a process, not an achievement; mistakes will be made.
- Create and follow accountability measures.

Data is subject to bias
- Bias can enter at any stage of data management; data is less accurate and less representative when affected by bias.
- Listen when data contradicts assumptions and expectations; compare quantitative data to qualitative data and lived experience. Diverse perspectives can help identify bias.

Data represents people
- Treating information as valuable is one way of treating people as valuable. Informed consent and cultural safety are essential for collection.
- Ensure data accurately represents people through categories that reflect self-identification.

Data has consequences
- Visibility can be both beneficial and dangerous. Listen to clients and communities to learn how data practices are impacting them.
- Fair and accurate data can empower. Misrepresentation can cause harm and silence vulnerable voices. Ask what your data is doing.

Data does not exist in a vacuum
- Data reflects the interaction of individuals, histories, and systems.
- Context, including current and historic oppression, guides understanding and interpretation.

Data management must balance public good and personal privacy
- All data collection is invasive, so only collect data that serves a purpose.
- Understand and respect clients' right to decide what information to share.

Slide 11:
One way to think about data is through narratives. Know your subject, which could be described by the questions you want to answer; know your purpose, or the goal you want to achieve through this process; determine your audience, the main people or organizations with whom you'll share this narrative; and understand your evidence, the data you will use to illustrate and prove the subject of your data story.

These are all related, but it can be helpful to start with purpose. Once you know what you want to achieve, look at who you need to communicate with. With that foundation, consider what kind of evidence that audience would find compelling.

Example: if you want to communicate a need for more funding or the ability to shift allocations, the subject would be specific program areas and the audience would be a funder. To build a narrative compelling to funders, you want quantitative data, numbers that back up your subject, and possibly qualitative data, such as testimonies from clients or staff or findings from focus groups. So your purpose is funding, your audience is the funder, your subject is a specific program or activity, and your evidence is the numbers and/or stories that describe the need for the change.

Finally, once you know your subject, purpose, audience, and the evidence you need, identify the data needed to conduct the analysis, including what data you have and what you lack. Think of the subject and purpose as the what, the audience as the who, and the evidence as the why.

And as part of equity, always consider whose story you are telling. Is this your agency's story? Is it your clients' story? What does it mean for your organization to tell a story about newcomers? Begin with these questions but also delve deeper.

Slide 12:
Data equity brings us back to core principles and key questions. As part of designing data narratives, these questions can be used to frame the process.

First, always ask what your data is doing. Who is it describing, and who is being left out? Is visibility actually desirable for this group? Where is it helping or harming?

The language you use has consequences. Labels that don't accurately describe the people involved misrepresent them. This is both disrespectful and often perpetuates stereotypes. If you only describe clients in terms of what they lack, rather than looking also at their strengths and successes, you create lopsided stories that build a distorted image of people who only need things but have nothing to offer.

Consider where this data narrative is being shared. If you constantly take data from clients but offer nothing in return, you establish a fundamentally unequal relationship based on extraction. Think about how you can share with clients and communities the results of the data they share with you. Can you make reports available to the public? Can you present the information in alternate formats, such as info sheets with visual elements and accessible language, or even short video or audio recordings? Can you hold community events and forums to share what you've learned and learn what communities want to know? Make data an opportunity for exchange and sharing.

Transition: So let's apply the concept of data narratives and data equity to a case study.

Slide 13:
[Suggestion: prepare a targeted example of how data is used in the organization and guide participants through structuring that use as a narrative.]

[Pause to give participants time to answer each of these questions – subject, audience, evidence, analysis, and what data is needed before using the click-through animations to show possible answers.]

Note for analysis: This is the stage at which your GBA Plus work gets the most mileage. Here you want to build an understanding of who is using your service and what that is like for them, including how successful it is. Which is why when you get to the data you need, disaggregation is so important to understand who is enrolling, continuing, or withdrawing, in order to identify identity factors that may be affecting access to and success in LINC classes. Disaggregation is the method for separating data based on shared factors; it is how you can find out if women or men are more likely to drop classes, parenting or non-parenting clients, or if any other identity, such as visible minority, disability, LGBTQIA+, etc may have an effect on enrollment and/or completion. This is especially useful for spotting service gaps based on identity factors and is key to GBA Plus analysis.

Once you know what data you need to tell this story, check your data practices – do you have all the data? Are there mechanisms in place to enable the analysis you need (like disaggregation)? Find your data gaps and plan to fill them.

Transition: As you're working through this process, and particularly as you delve into your data, make sure you integrate data equity principles.

Slide 14:
[Pause to give participants space to offer their ideas on how to incorporate data equity through activities, standards, principles, and practices. Use click-through animations to explore related equity concepts. Encourage participants to think of concrete steps.]

First, your data represents real people with real lives and concerns.
- As an organization with the resources to gather and analyze data, you hold power. One way to further equity is to answer questions raised by clients and their communities.
- Engagement with communities throughout the process supports relationship-building and also creates opportunities to gather qualitative data.
- Remember that there is a risk your data narratives could be used against clients in competing narratives. Also look at how your work can be used by communities, particularly if they could be evidence in support of community advocacy work.

Equity is especially important when collecting data of all kinds.
- Be transparent about what data you're asking for, why, and how it will be used.
- It's also important to make an effort to use categories and labels (such as cultural or ethnic groups, gender identities, etc) that align with the ways individuals and communities describe themselves.
- These practices contribute to establishing culturally safe spaces for data collection. Cultural safety requires humility, a learning mindset, an awareness of the power dynamics at play, and a dedication to mitigating those imbalances.

When working with the data you've collected, keep in mind that:
- Intentional curation results in databases that more easily and effectively collate and disaggregate data.
- Finally, qualitative data gained through observation, focus groups, informal conversations, and/or open-ended surveys helps to check and verify what the numbers are telling you. When there's a mismatch between what clients and staff are reporting versus what the statistics say, that's a sign that you need to dig deeper into what's going on and why.

Slide 15: Take 5-10 minutes for everyone to reflect, stretch, and take care of needs.

Slide 16:
[Invite participants to explore the concepts of data narratives and data equity within the context of their own work in pairs or small groups. You may provide a list of possible subjects or objectives, based on work the agency is currently doing, that participants can choose from if they have trouble forming their own. Each pair or group should explore ideas for data narratives and incorporating data equity and then share back some highlights with the larger group.]

Note: If you have a different timeframe for your workshop, update this slide with the correct amount of time participants have for discussion.

In person: Post-its or oversized poster sticky pads can be used for groups to record their thoughts – this can be helpful when following up on these conversations after the workshop.
Virtual: Use breakout rooms for participants to discuss and then share back. Encourage use of the chat.
Consider: Providing the Data Narratives Workshop Worksheets to each group, to help participants organize their thoughts.

Slide 17:
[If using an evaluation survey, you may replace the QR code on this slide with a QR code or link to your survey so that participants can access it immediately.]

Note: If this workshop is virtual, replace "write your thoughts on the sticky notes provided at your table" with "type your thoughts in the chat."

Give participants a chance to reflect on their own or in pairs/groups. You can offer all the questions at once, or separate them and consider each question separately. For the first and fourth questions, consider starting them with a nonverbal check-in.

In-person options: a show of hands for yes (up)/no (down)/somewhat (flat), or raised fingers for rating from 1 to 5.

Virtual options: Using the raise hand function for agreement, posting in the chat, polls, Slido, or Mentimeter.

Consider posting the workshop objectives in the chat and encouraging participants to reflect on how well the workshop experience met those objectives.

Follow-up questions may include: "What aspect of (GBA Plus, data equity, data narratives) do you feel most confident about? Why?" "What are your take-aways today?"

Slide 18:
[Thank participants and organizers.]

Workshop follow-up suggestion: assemble ideas and insights from participants into a document that can be shared alongside a copy of this presentation. Include a section for the comments that were placed in the parking lot or chat during the workshop.

Guide to Equity-Driven Data Management

Tools for Developing a Gender-Based Analysis Plus-Enabled Data Management Strategy

AUGUST 2024

AMSSA®
Strengthening Diversity In BC

Contents

Contents

Acknowledgments

Addressing systemic inequities and advancing gender equality for all newcomers is central to their successful integration.

The Enhancing National Sector Gender-Based Analysis (GBA) Plus Capacity project assembled a staff team from seven Umbrella organizations across the country. These organizations have worked to enhance the immigrant and refugee serving sector's capacity to mainstream GBA Plus within programs, policies, and procedures through a Collective Impact model.

This project was led by the Alberta Association of Immigrant Serving Agencies (AAISA) in partnership with Affiliation of Multicultural Societies and Service Agencies of BC (AMSSA), Saskatchewan Association of Immigrant Settlement and Integration Agencies (SAISIA), Manitoba Association of Newcomer Serving Organizations (MANSO), Ontario Council of Agencies Serving Immigrants (OCASI), Atlantic Region Association of Immigrant Serving Agencies (ARAISA), and Fédération des communautés francophones et acadienne (FCFA).

The partner organizations who contributed to this project are well-placed within the immigrant and refugee serving sector in Canada to lead initiatives that contribute to longer-term systemic change. This project assessed the status and capacity of Service Provider Organizations (SPOs) across Canada to meet the specific needs and priorities of diverse newcomer populations. Through identification of key assets, gaps, and opportunities, funded recipients tested and refined various approaches to mainstreaming GBA Plus across the sector. Activities included *developing settlement sector specific GBA Plus mainstreaming research,* as well as *the creation of a bilingual tested resource guide on the mainstreaming approach.* This initiative marks a pivotal step in integrating the GBA Plus framework amongst the umbrella organizations and within their member organizations within the Canadian settlement sector.

Introduction

Through The Enhancing National Sector Gender-Based Analysis (GBA) Plus Capacity project, umbrella organizations across Canada have partnered to enhance the immigrant and refugee serving sector's capacity to mainstream GBA Plus within programs, policies, and procedures.

Data is an essential component of any GBA Plus initiative, as it enables the identification of differences in how clients access and benefit from services. Newcomer-serving agencies often possess large amounts of data, but do not always derive as much value from that data as is needed or wanted. This document is designed to guide newcomer-serving organizations through the process of developing and implementing a GBA Plus equity-driven data management strategy. Each step is laid out and accompanied by supporting worksheets.

A comprehensive data management strategy allows organizations to ensure their data practices align with organizational mission, vision, and values; enhances equity work; and empowers agencies to derive maximum value from their data throughout its lifecycle. This guide can be used to inform organizational data management no matter where the organization is at in their data management journey. However, regardless of the stage an organization is at, it is recommended that the agency take the time to identify their data needs and goals, as outlined in Phase One.

Any organization serving newcomers can use this guide. Although it provides specific steps and questions for each stage of the process, it is intended to support internal processes, not to supersede them. GBA Plus and data equity depend on responsiveness to the context in which they are developed; therefore, organizations are encouraged to adapt the suggestions and guidelines contained here to fit their own work.

Because each agency engages with data in different ways and comes to the work with different knowledge and tools, this guide begins with an introduction to GBA Plus and data equity as well as an explanation of key data terms. There are many facets to data management, and while it is recommended that all data practices be examined, resource limitations may require agencies to prioritize certain areas for more in-depth evaluation. The following sections will help organizations make strategic decisions about where to focus their efforts.

Introduction

How to use this guide

This guide walks organizations through the foundations of data management and five subsequent phases of developing a data management strategy. Each section includes worksheets to support that phase as well as case studies illustrating their use. The chart on the following page provides a visual reference for the process of developing a data management strategy that fits organization needs, upholds data equity and organizational values, and enables GBA Plus analysis.

Foundations: In this section you will find a brief introduction to the importance of data for service-providing organizations (SPOs), information about GBA Plus in the newcomer-serving sector, six principles of data equity, and a glossary of terms for data work. These concepts are the foundation for the rest of this guide.

Phase One is identifying how the agency uses data through key questions, outlined on Worksheet 1. Because data is a tool for conveying meaning, this phase also asks what stories the organization wants to tell with their data and what data is needed to communicate each narrative to its respective audience; Worksheet 2 provides a template for this process.

Phase Two guides agencies in evaluating their current data practices to examine where they already uphold GBA Plus and data equity, see where practices meet the agency's data needs, and identify gaps and incongruencies. Worksheet 3 provides reflection prompts on equity within data practices, while worksheets in Appendix B guide evaluation of individual practices.

Phase Three supports agencies in using their data evaluation and identified data needs and goals to create a data management strategy that builds on existing strengths to fulfill needs and obligations while maintaining equity commitments. Use Worksheet 4 to design practices for meeting data needs and Worksheet 5 to integrate GBA Plus, values, and data equity.

Phase Four offers suggestions and considerations for agencies as they put their data management strategy into practice. It includes logistical questions as well as ones highlighting equity during the implementation process. Through Worksheet 6 you will establish an implementation plan for the overall strategy, while Worksheet 7 frames individual data practices.

Phase Five provides guidance for establishing mechanisms to regularly check data practices for equity, utility, and compliance with standards set during the Design phase. Worksheet 8 offers framing questions for monitoring data equity, while Worksheet 9 focuses more on logistics.

Finally, the **Conclusion** brings the answers reached through the various worksheets to a sample template and draft for a comprehensive data management strategy. Worksheet 10 is a complete template for agencies to adapt to their own needs when compiling a data management strategy based on their use of worksheets in Phases 1 through 5.

Introduction

How to use this guide

Appendix A consists of a more in-depth guide to the core data practices and related activities outlined in **Phase Two**.

Appendix B is a set of worksheets building on **Phase Two** by providing guiding questions for evaluating each core data practice. These worksheets support the potential activities described in Appendix A and provide useful information for designing a data strategy.

Phases of Building a Data Management Strategy

EXPAND

IDENTIFY

MONITOR

WEAVE

EVALUATE

IMPLEMENT

DESIGN
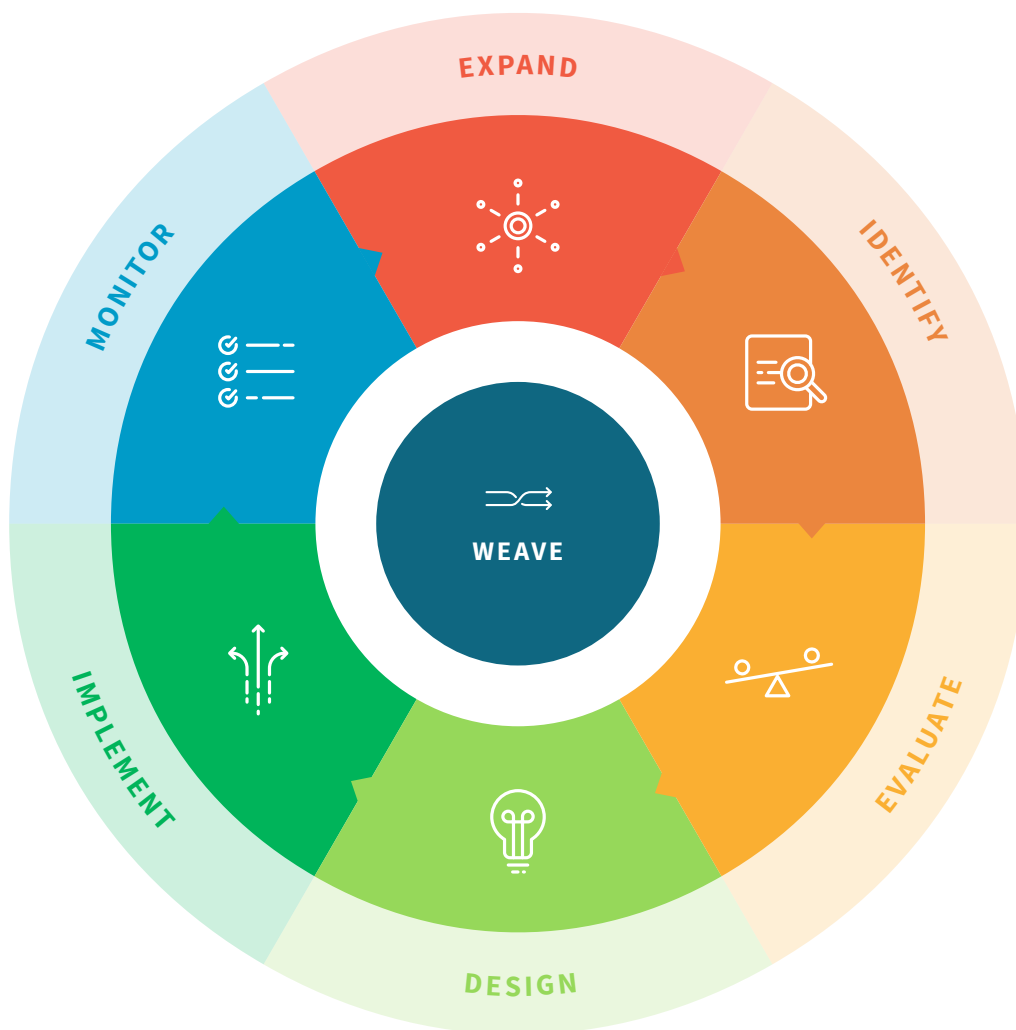
Data matters

All agencies use data all the time. Data plays a key role in many core functions within an organization.

It is used to describe the work being done, such as through reports to funders or communities; to evaluate programs and pinpoint successes and gaps; and to provide supporting evidence that demonstrates and proves what is seen and known internally. When front-line staff see that programs are not aligning with client needs, or when clients express barriers or challenges, data provides essential evidence to support efforts to improve, adjust, or expand programs and policies.

For example, staff may notice a drop in language class attendance during the summer months. Data helps us to understand precisely what sorts of clients are affected. Recording attendance, enrollment, and withdrawal numbers allows the agency to prove that what they observe is reflected in actual attendance numbers. Access to demographic data like age, gender, immigration status, family composition, and so on, allows the agency to pinpoint who is withdrawing from classes at this time. Examining that client data may uncover the fact that most of those withdrawals are parents with younger children. Now, instead of broad measures like distributing a survey to all language class students, the agency can focus their investigation on parenting clients. Engaging directly with withdrawing students leads to a greater understanding of the barriers they experience; for example, they may be unable to attend because they need to be at home taking care of their school-age children and cannot afford childcare that would allow them to attend classes. With this information, the agency is able to explore and design program interventions with the potential to remove those barriers – perhaps by connecting clients to affordable childcare programs, offering on-site childcare, or creating an in-home or remote tutor program for the summer months. Data like this can also be important when applying for funding, as it allows the agency to demonstrate the need they are seeking to meet (for example, funding that would allow them to offer these interventions). This sort of focused intervention is much more difficult to achieve without adequate access to data that helps explain and direct deeper investigations.

> ## USING THIS GUIDE
>
> At the beginning of each section, you will find a blue box just like this one with a brief overview of what you will find in that chapter and suggestions about how to get the most out of it.
>
> **In this section, Foundations, you will find:**
> 1. An overview of data work within GBA Plus, including data equity.
> 2. Key terms that will be used throughout the guide.
> 3. An introduction to the two hypothetical organizations whose data process will be presented as case studies in each phase.
>
> You can read these sections closely before embarking on the full process, or you can skim through this chapter and revisit its contents as you work through the worksheets and case studies in the rest of the guide. Both are valid; choose the approach that works best for you.

To get the most value out of data, it is essential to have a data management strategy based on how the organization uses – and hopes to use – their data. Because data can serve many purposes and be used in many different ways, a formal strategy begins with identifying needs and goals, a process outlined in Phase 1. But it can be dangerous to look at data solely as a tool or resource. Because the data that is most useful represents actual people, it is necessary to consider how data practices not only support organizational needs but also how clients are impacted by the ways data is collected and used. This guide uses GBA Plus and data equity as complementary frameworks to ground each stage of data management in equity, justice, and inclusivity.

GBA Plus and data equity

COMMUNICATE	IDENTIFY ISSUE	DOCUMENT
	CHALLENGE ASSUMPTIONS	
	GATHER THE FACTS—RESEARCH AND CONSULT	
	DEVELOP OPTIONS & MAKE RECOMMENDATIONS	
	MONITOR & EVALUATE	

EXCELLENT RESULTS FOR DIVERSE CANADIANS

Graphic drawn from Women and Gender Equality Canada's Introduction to GBA Plus online course

This guide and the accompanying worksheets provide agencies with a framework for evaluating and improving their existing data management practices in order to facilitate the development of a data management strategy that meets their needs and obligations. This process is guided by two lenses: Gender-based Analysis Plus (GBA Plus) and data equity.

GBA Plus is an analytical framework used to examine policies, programs, and practices to understand how different groups experience and benefit from policies and programs in different ways. The Government of Canada calls for its use in all policy and program design and evaluation, but engaging in GBA Plus analysis requires well-organized and robust data because data is the first and most foundational step in the process. Women and Gender Equality (WAGE) Canada describes GBA Plus as a process in which the first three steps are identifying issues, challenging assumptions, and gathering relevant facts.

Foundations

Data is essential to these three activities, as accurate understanding of people and situations is necessary to analyze how different groups use services and how well services meet their needs.

This requires data not just on service usage, but also the people using services, to be able to understand how factors like ethnic and linguistic background, racialization, gender identity, dis/ability, sexual orientation, among many others, interact to shape their experiences and needs. To carry forward the example about LINC student withdrawals, GBA Plus analysis would enable the agency to explore whether factors like racialization and disability play a role in students' ability to attend classes, further refining the understanding that would allow them to, for instance, offer tailored programs facilitating access for disabled students. Data is also helpful for challenging assumptions and checking bias, as it can demonstrate where those assumptions fail to reflect reality. The evaluation framework outlined in Phase 2, and expanded upon in Appendix A, helps agencies determine where their data practices support GBA Plus and where work may be needed to expand this capability.

Data equity is a complementary framework to guide anyone who works with data through a lens of justice, equity, and inclusivity. It builds on concepts of data *ethics*, which focus on appropriate use of data through privacy protections, recognizing and mitigating biased data, and ensuring data quality to avoid spreading misinformation.[1] Data *equity* considers how data is collected, analyzed, interpreted, and distributed through questions about power, bias, and discrimination. It acknowledges and seeks to minimize biases and the exclusion of underrepresented groups at all stages of the data process – collection, curation, analysis, and use.[2] Because data plays such a key role in program and policy development, including funding, data practices have an unavoidable impact on how individuals and communities access and benefit from services. Equitable data processes contribute to equity in resource distribution and outcomes for diverse groups. This guide includes worksheets to support agencies in using a data equity lens when examining their data practices.

Principles of data equity

Although data management can be a complex process, data equity is rooted in six foundational principles that can be used to ground and guide the development of a data management strategy.

Use the following principles to shape an equity-driven foundation for your agency's data policies and practices, along with these worksheets:
Worksheet 3 | Worksheet 5 | Worksheet 6 | Worksheet 8

1

PRINCIPLE 1:
DATA REPRESENTS PEOPLE.

Respecting people means respecting their data.

The decision to collect a piece of information makes a claim about the importance of that data. For example, to collect gender identities is to say that gender identity is important information to have, but the choice of what labels to offer also makes a statement about which identities are institutionally recognized and therefore valid. For this reason, it is important to consider the labels and categories with which various communities self-identify. Furthermore, treating information as valuable means putting it to carefully considered use. Data must not be manipulated in ways that may misrepresent the human beings that it describes, and must be used in a manner that is respectful to the people who have shared it.

2

PRINCIPLE 2:
DATA IS SUBJECT TO BIAS.

Check the data and let the data check you.

All humans experience conscious and unconscious bias, and processes can carry those biases even in the absence of intention. Bias can be introduced at any point in the data lifecycle and must be consistently guarded against. The decision of what questions to ask and how to phrase those questions can be affected by bias, through word choice and the decision to include or exclude certain categories. The act of collecting data can also be subject to bias and assumptions, as collectors may explain questions and categories in ways that affect client responses or even fill in answers without client input. Quality management in the curation process may also be affected by bias, such as the choice to exclude all data records missing specific pieces of data, or to lump categories together when response numbers are small. Even if great care is taken throughout all of these steps, analysis is subject to bias when analysts approach the data with preconceptions or fail to account for broader contexts, such as historic disadvantages faced by a specific community. GBA Plus analysis is hampered when data does not adequately represent the diverse groups involved. One way to counter bias is diversity among staff who interact with all stages of the data lifecycle, ensuring that they can safely express concerns and opinions which may contradict a more dominant view. Another is to compare quantitative and statistical data to the lived experiences of clients.

3   DATA HAS CONSEQUENCES - "WHAT GETS COUNTED COUNTS."[3]

Always ask what your data is doing.

When data accurately and fairly represents people, it contributes to equitable distribution of resources, and to policies and programs that are able to serve and empower diverse groups. When data misrepresents a population, that group may be harmed, through the perpetuation of stereotypes, reduced access to and lesser benefits from programs intended to serve them, the diversion of resources away from their needs, and silencing as their lived experience is overwritten by data-derived narratives. It is also possible for visibility to be harmful, exposing individuals to discrimination. Both sides of visibility must be considered. Newcomer-serving agencies provide invaluable support to immigrants and refugees, many of whom exist at the intersection of multiple axes of marginalization. It is extremely difficult to design programs and policies that serve vulnerable groups if the information used for program and policy development is inaccurate or misused, and it is essential to listen to clients and communities to learn how data practices are impacting them.

4   PRINCIPLE 4: DATA DOES NOT EXIST IN A VACUUM.

Context shapes understanding and interpretation.

People exist at a confluence of place and time, and their experiences are shaped by both past history and current conditions. Many communities face or have historically faced discrimination, oppression, and other disadvantages. Therefore, it is essential to place data in its proper context. For example, racialized newcomers may have lower employment rates compared to non-racialized newcomers. This piece of data must be considered in the context of racial disparities in access to education and training, discriminatory or biased hiring practices, and available opportunities in the country of origin. If use of employment services is also lower among some of these groups, that must also be examined in context. Lived experience is valuable when contextualizing data, because data such as service use statistics can demonstrate where a disparity exists but cannot, on its own, explain why that disparity exists or how it could be addressed.

5   PRINCIPLE 5: DATA MANAGEMENT MUST BALANCE PUBLIC GOOD AND PERSONAL PRIVACY.

Be intentional about what you collect and how you protect it.

All data collection is invasive, as it asks individuals to disclose information they may not ordinarily share. Some data may be extremely sensitive, such as for LGBTQIA+ persons who are not "out." Every piece of data must be collected for a purpose, with informed consent, in a culturally safe manner, and used to benefit the public good. All data must also be carefully protected to ensure privacy and confidentiality, including anonymization where feasible.

6   PRINCIPLE 6: DATA MANAGEMENT IS A LEARNING PROCESS.

Commit to owning and learning from mistakes made along the way.

Data practices are designed and carried out by human beings, with all the imperfections of any human endeavor. At times, these practices will cause harm or introduce errors. For example, an error in collection practices may result in policies that overlook the access needs of a specific community, or in data analysis algorithms that reproduce harmful stereotypes. In such cases, an agency must be ready to acknowledge the impacts of this error, assess their practices to determine its cause, and remediate those practices so that they are more equitable in the future.

Key Data Terms

AGGREGATION is the process by which information about multiple people, such as the entire client base of a program, is compiled from databases to prepare combined data sets for processing. Aggregation is necessary to analyze groups of people. *See also:* Disaggregation.

COLLATION brings together different pieces of data for comparison. This is often done after disaggregation, so that similarities and differences between groups can be identified.

CULTURAL SAFETY is the creation of a space where clients feel safe disclosing their personal information and is necessary for informed consent and collecting accurate data.

CURATION is the term for processes used in processing, housing, protecting, and maintaining data in order for value to be derived from it.

DATA EQUITY describes "the principle of fair and just access, representation, and use of data across diverse communities and stakeholders."[4]

DATA MANAGEMENT describes how an agency collects, stores, curates, and uses data. A data management strategy is an important tool for ensuring that all steps in the data process align with the agency's mission, vision, and values as well as answer key questions with quality data.

DATA NARRATIVES are a framing device for organizing and analyzing data around a specific purpose, using evidence tailored to speak to a particular audience.

DATA QUALITY refers to the accuracy, completeness, and consistency of data. Inaccurate data may include invalid data points, missing values, or outlier data.

DATA STANDARDS are the rules used to standardize how data is described, represented, and structured, such as common terminology, consistent representation of dates, and shared definitions. It also includes making data recognizable through an accessible database or file format. Data standards ensure that data is findable, accessible, easy to use/re-use, and share.

DATA SETS are collections of data. Often, an individual dataset is created by pulling specific pieces of data from a larger collection, such as Amharic-speaking refugees from an agency's data on all clients, or temporary foreign workers accessing a specific program. **Predetermined datasets** are created by programming a database to return a specific subset of data in a reusable manner.

DE-IDENTIFIED data is created by the removal of personal identifiers, such as name, SIN, personal health number, and address. This protects the privacy of the people from whom data is collected and is sometimes referred to as **anonymizing** data, or making it anonymous. It is different from **confidentiality**, where personal identifying information is protected but remains linked to all of a person's data.

DISAGGREGATION is the process by which aggregated data is separated by factors such as gender, race, immigration status, or dis/ability, among many others. It is essential for GBA Plus analysis and equity-driven work because it enables identification of differences in how various client groups access and benefit from services. *See also:* Single-factor and Multi-factor analysis.

Key Data Terms

INTEROPERABILITY describes the ability to share data between stakeholders or databases and the ease with which it can be combined with other data. For data to be interoperable, they must share equivalent standards (such as age ranges) and use compatible file formats (e.g. CSV).

LONGITUDINAL DATA describes the manner by which iterations of data are linked to create a picture of change over time. This form of analysis is most useful for tracking outcomes, trends, and impacts. *See also:* Snapshot data.

METADATA is information provided alongside data to make it easier to use, such as the source and how it was cleaned, processed, and/or calculated. It may also include a description of the data quality, such as missing data, how the data was validated, and what data standards were applied or followed. It can be thought of as a **data biography**, describing how the data came to exist in its current form.

MULTI-FACTOR ANALYSIS is a method for enabling **intersectional** analysis through comparison. An example is looking at outcomes for refugee women (intersecting factors: gender and immigration status) and comparing that information to outcomes for other groups to see how gender and immigration status interact to affect the experiences of people situated at that identity intersection.

QUALITATIVE DATA is information derived from non-numeric sources, such as client testimonials, interviews, or surveys with open-ended questions. It can provide context to **quantitative data**, which uses statistical analysis to answer questions. In particular, quantitative data is helpful for identifying *where* disparities are, but qualitative data is where investigators learn *how* and *why* those disparities exist.

SINGLE-FACTOR ANALYSIS examines how one identity factor influences client experiences. For example, analysis by gender is single-factor. This is helpful to determine disparities, though it is important to also consider the possible effects of other factors, such as race or immigration status, through multi-factor analysis.

SNAPSHOT DATA provides a picture at a single point in time. This might be cumulative (such as a total number of clients who have accessed services to-date) or iterative (such as how many active client files exist at a specific point in time). This sort of rapid data picture is best generated through pre-determined datasets.

WAREHOUSING is the manner in which data is stored. This describes both the location (database or client management system, server, cloud server, etc.), the protections that are in place to protect privacy, and the means by which the data is accessed, including who has permission to view, change, or export data.
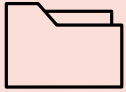
Because data work is complex, it often helps to have access to examples of how it could be done.

Integrated into this guide are two case studies providing glimpses into how this guide and its worksheets can be used in different contexts. Look for the **RED** and **YELLOW** color-coded boxes to see how two hypothetical organizations navigate the data management strategy development process, from identifying their data needs all the way through monitoring their ongoing work. Use these case studies to get a sense for how the work *could* be done, understanding that some pieces may be more relevant to your organization's context than others. The next few paragraphs offer an introduction to the context for each case study. Note that these case studies use fictional organizations; examples are composites and extrapolations loosely drawn from multiple organizations who tested this guide.

CASE STUDY A

ORGANIZATION A is a small settlement service provider serving several small communities in a rural area.

12 staff	Regional, rural service area	Recently digitized	Starting to build data practices

They made the shift from paper files to a digital database less than a year before embarking on a data management strategy design. Currently, their data collection is narrowly focused on reporting to funders, but as they have worked to integrate GBA Plus into their practices, they find that they need access to more data to dig as deeply into their work as they would like. Although they feel confident in their current knowledge about their work, they also have a number of questions that they feel data can answer, and they want to be able to support and challenge their rich qualitative data with quantitative data.

Equity is a driving force within this organization, and they are very intentional about how they engage with their work, both when working with clients and when working with each other. As with any organization, their priorities and concerns are shaped by the context in which they work. In this case, they connect with the data equity principles *Data represents people* and *Data has consequences*, knowing that safety and confidentiality are essential for the populations they serve.

CASE STUDY B

ORGANIZATION B is a larger organization operating in a major urban centre.

90 employees	Major urban centre	Established data practices	Exploring data and equity intersections

They have been using a Client Management Software database for several years and as a result have fairly set data practices, although they do not have an explicit agency-wide policy around data management. Funder reporting and program assessment are their main uses of data, though they believe there is a great deal of untapped potential in the data they collect.

For Organization B, these potential data uses must be balanced against clients' right to privacy. One of their priorities is making sure that everything they collect serves a purpose that ultimately benefits newcomers and their communities. As a result, they connect most strongly with the principle *Data management must balance public good and personal privacy.* Their previous and ongoing work on anti-racism and LGBTQ+ positive spaces has also led to an organizational commitment to the principle *Data is subject to bias,* and one major reason they want to make more use of their data with respect to GBA Plus and equity work is its capacity to challenge assumptions.

Identify data needs & goals

The foundational step to developing a data management strategy is considering data priorities.

This process requires agencies to identify the questions they have which can be answered through data as well as how and with whom they will be sharing data. Non-profit organizations often face a disconnect between their data practices and actual data needs,[5] an issue that leads to gaps in desired data as well as data going unused or underutilized.

USING THIS SECTION

This section will guide you through two methods for identifying your agency's data needs: key questions and data narratives.

Use this section in three ways, depending on what is most useful to you:
1. Read through the text.
2. Reflect on the case studies.
3. Complete the Data Questions and Data Narratives worksheets.

Some parts of the case studies will be more relevant to your work than others—and that's okay! Adapt this process to fit the context and needs of your organization.

Agencies should begin this process by considering what work they want their data to do, including the questions they have about their own work and the data needed to answer those questions. This process benefits greatly from collaboration across teams and departments, as each program's staff may have different questions and hold different pieces of the larger puzzle. Consider creating a small group to take the lead on this process with representation from different teams or programs who can be bridges for questions, needs, and ideas. This group can use Worksheets 1 and 2 to collaboratively build a comprehensive picture of the agency's data needs and goals.

Data equity remains an important aspect of this process, so consider not just what you want to know, but *why* you want to know and who that knowledge will impact, positively or negatively.

To fully understand the ways data is currently used, and to explore how data *could* be used, consider the following questions:

- Who are we serving? How can we tell what groups may be underutilizing our services?
- How do we measure the effectiveness of our work for diverse groups of newcomers?
- What are the narratives we want to be able to tell? Who do we want to reach with them?
- What data is needed for these narratives and measures? What is missing?
- Who is missing from our data? Who is going overlooked or underrepresented?
- Are we using all of our data? Is there data we can better use or stop collecting?

QUICK TIP

As much as possible, this group should also incorporate staff of different identities and backgrounds. When diverse perspectives are both present and valued, they can help locate each other's blind spots and biases. This furthers both GBA Plus *(Challenge assumptions)* and data equity *(Data is subject to bias)*.

As part of this process, reflect on the impacts of data practices. From whom is data collected? How is it used? What is the impact on this use? How can harms be reduced and benefits increased for newcomers? Ponder these questions as you complete Worksheet 1. The following examples may help spur ideas.
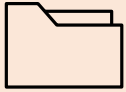
CASE STUDY A

ORGANIZATION A decides they want to better understand their client populations, so they identify their first key question as: "Who are we serving?" In considering the role of data in answering this question, they determine that demographic data will be the most useful. They currently collect some of this data (such as age and mother tongue) for funder reporting, but the information they want goes beyond what their funder requires, so they identify this as a data need. But this organization does not want to collect information without a good reason, so they consider how they will use this data and what risks its collection may present to clients.

They also want to be able to evaluate their programs, framing this with the question: "How effective are our services?" They decide that this requires usage statistics, such as program enrollment, as well as the ability to disaggregate demographic data so that they can use GBA Plus to determine how different client populations access and benefit from their services. This will require them to work with their database contractor to build in some reporting templates that will perform the collation and disaggregation they need.
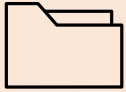
"Who are we serving?"

| How can data answer this question?	What are potential impacts?
• Demographic data such as age, gender, population group, sexual orientation • We collect some of this data	• Ability to offer more targeted programs • Possibility of building connections with other community organizations • Safety concerns for some clients (e.g. LGBTQIA+)

CASE STUDY B

ORGANIZATION B has a slightly different question: "Where are the gaps in our services?" As they reflect on this question, they decide that they also want to know where clients are most successful, so they reframe this question as "How do diverse newcomers experience our services?" Digging into this question, they realize it has several layers. First, they need to know who is accessing their services, which means they need demographic data. Because they have decided to prioritize integrating GBA Plus, they need the ability to disaggregate this data.

Then, they need to know how their services are being used, which they decide will require usage and outcome statistics. To find those statistics, they need several pieces of data, such as enrollment, departure from services, and milestones like finding employment or completing a LINC course. Although they already track raw enrollment numbers, they do not currently link clients' demographic information to their service usage. They identify this linkage as a data need.

Finally, they decide that they want to incorporate clients' personal experiences through a satisfaction survey. This entails a special project, but they value qualitative data for its ability to contextualize their numbers and check their biases.

"How do diverse newcomers experience our services?"

How can data answer this question?	What data do we have?	And what data do we need?
• Demographic data can tell us who is accessing a given service • Enrollment statistics can tell us what services are most and least used • Milestones and outcomes can tell us where clients are having the most and least success • Linking these three can help us find patterns in who is having success and where they are having it • What clients tell us about their personal experiences helps us understanding why some services work better for some clients than others	• Demographic data • Outcomes • Enrollment	• Disaggregation • Milestones • Linkage • Qualitative client experience
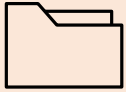
Ultimately, data is a storytelling tool.

The example about LINC student withdrawal on page 5 shows one way that agencies can tell a story using data – in this case, it is a story about parents in their language-learning journey. It is also a story about the organization – how it works with different clients to find the best ways to meet their needs. The same data can be used to tell many different stories, so agencies need to consider who they want to communicate with in order to determine what evidence would be most compelling for that audience. Understanding who is listening to the story and what the story is about shapes the supporting details (i.e. data) that make the story engaging, believable, and convincing. This process can be thought of as creating a *data narrative*. It is a way for the organization to identify what data needs to be collected, how it will need to be organized for the greatest utility, what gaps exist, and to consider not just who each data narrative is for, but also who each data narrative *affects*.

To support GBA Plus integration, organizations need to identify intersectional identity factors to be considered within each data narrative. Upholding data equity means agencies must frame this process through the principles outlined on pages 8-9. In particular, remember that *data has consequences* – the language used in a data narrative can have profound impacts on how its audiences react to the information. One suggestion is to move away from deficit framing; the question asked above by Organization B is an example of this shift, as it looks to client experience to locate successes as well as gaps.

When constructing data narratives, the key pieces are the:

- **PURPOSE** (why you are telling this story and what you hope to achieve)
- **AUDIENCE** (who you will tell this story to)
- **EVIDENCE** (the supporting information that will demonstrate or prove your purpose for the identified audience)

Use Worksheet 2 to explore the data narratives your organization wants to tell. On the next page are two examples of organizations designing data narratives as outlined in Worksheet 2.

QUESTIONS OR STORIES?

You may find as you consider your agency's data needs that data questions are more useful to your process than data narratives, or vice versa. Feel free to use one or both as works best for your agency, team, and context.
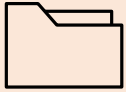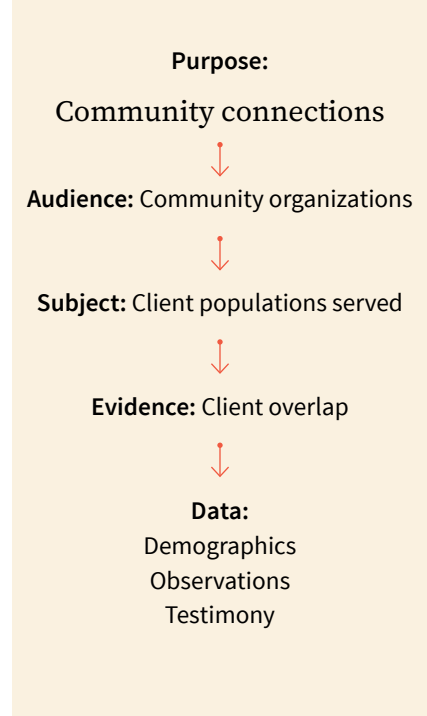
CASE STUDY A

ORGANIZATION A considers the impacts of better understanding the populations they serve, and finds a connection between their original question ("Who are we serving?") and their goal of building stronger connections with other community organizations who serve similar populations (such as ethno-cultural or religious organizations) or populations with similar needs (such as employment or food insecurity). They determine that their purpose is to build community connections; their audience is other community organizations in the area; and the subject of the narrative is who they serve. In order to convince ethnocultural or faith-based organizations that collaboration will benefit their shared clients, they need demographic data that will show the overlap in client populations. To connect with organizations such as food banks, the organization may instead want to look at needs assessments and referrals, as well as case notes about needs that arise throughout the client's journey. They consider the importance of statistical evidence, such as "We hope to build a relationship with the local Filipino cultural association because we currently serve 47 Filipino clients" (which they plan to draw from demographic data) or "We want to connect with local food banks because 32% of our clients have used a food bank in the past six months" (information they intend to discover through case notes). From this process, they identify demographic data and service usage as data gaps, which overlaps with the gaps identified through their question on .
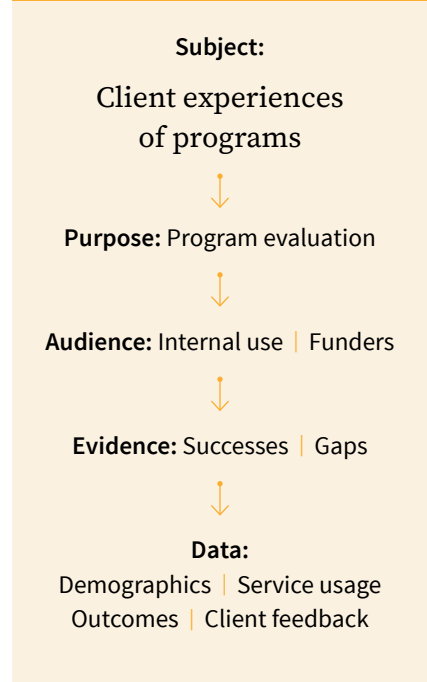
Data Narrative A

Purpose:

Community connections

↓

Audience: Community organizations

↓

Subject: Client populations served

↓

Evidence: Client overlap

↓

Data:
Demographics
Observations
Testimony

CASE STUDY B

ORGANIZATION B knows that they use data to report to funders, but want to deepen their use of this data. They take the subject "Client experiences of our programs" and decide that what they want is to evaluate their programs' effectiveness for different groups of clients. For this, they want to be able to make use of these evaluations internally, to discover where interventions would be most impactful, as well as sharing with funders. To develop findings in this context, they need to be able to locate successes and gaps – both who is benefiting most and why as well as who may be falling through the cracks and why. This analysis will require demographic data (which they will need to disaggregate) as well as service usage, program outcomes, and possibly milestones. They already have or collect much of this data, though they do not currently link the different pieces or have a systematic way to collect client feedback, so they identify both linkage and client feedback as data gaps – this overlaps with the data gaps they identified through their data question on . In the next step, Evaluation, they will take a closer look at what they collect and how it is stored and used.

Data Narrative B

Subject:

Client experiences
of programs

↓

Purpose: Program evaluation

↓

Audience: Internal use | Funders

↓

Evidence: Successes | Gaps

↓

Data:
Demographics | Service usage
Outcomes | Client feedback

Use this worksheet to explore ways your organization currently uses data and how you want to use data by developing questions you want to answer through data. This can be completed through group discussion, or it can be completed individually and then shared and discussed as a team.

Key Question:

1A How can we use data to answer this question?	**1B** What data do we have that can answer this question?	**1C** What data do we need to answer this question?

Key Question:

1A How can we use data to answer this question?	**1B** What data do we have that can answer this question?	**1C** What data do we need to answer this question?

To complete this worksheet, consider who you want to tell about the work you are doing (audience), what you want to share with them (subject), and why you want to share with them (purpose). Then consider what information this audience would value and what data you need to have access to for that purpose. This worksheet can also be completed individually and shared or worked through collaboratively.

2A Purpose:

2B Subject	**2C** Audience(s)	**2D** Evidence needed
•	•	•
•	•	•

2E Data required ⟶	**2F** Data available ⟶	**2G** Data gaps
•	•	•
•	•	•
•	•	•
•	•	•

2A Purpose:

2B Subject	**2C** Audience(s)	**2D** Evidence needed
•	•	•
•	•	•

2E Data required ⟶	**2F** Data available ⟶	**2G** Data gaps
•	•	•
•	•	•
•	•	•
•	•	•

Evaluate current practices

Once an agency knows what it wants data to do, it can determine whether its current practices meet those needs.

USING THIS SECTION

This section provides an overview of core data practices and an introduction to evaluating them. There are also case studies to provide an example of an evaluation's end result. Visit Appendix A for more detailed descriptions of the core practices and Appendix B for worksheets to guide evaluation of each practice.

Below is a suggested order for working through this content, but you can go through it in the way that best suits your work.

1. Read through the text in this section.
2. Reflect on the case studies.
3. Reflect on the questions in the Equity and Values Evaluation worksheet in this section and add your agency's values.
4. Review Appendix A: Core Practices
5. Complete the worksheets in Appendix B.
6. Return to the Equity and Values worksheet in this section.

The following summary outlines the evaluation process; refer to:

• Appendix A for a more in-depth description of the practices listed below

• Appendix B for worksheets supporting the evaluation of each of those practices

• Worksheet 3 in this section to frame your evaluation – place it prominently in the space where you conduct the evaluation

• As you complete Worksheets A1-A6, return to Worksheet 3

Consider how your current practices embody these values:

• What agency values do you most want to incorporate into your data work?

• What data equity principles resonate most strongly with your organization?

• What changes might bring your practices more in line with these principles?

Remember these questions as you examine the following core data practices.

• **STANDARDS:** The rules used to standardize how data is described, represented, and structured. Agencies should consider how their data standards align with those of collaborators, such as the Government of Canada, to enable interoperability and comparative analysis. Consider whether categories and labels align with the experiences and self-identification of communities from whom data is collected.

• **ANALYSIS AND USE:** Access to disaggregation and collation, how information is presented and distributed, and the context in which analysis takes place. Key to this process is examining how the use of data impacts newcomers and whether it empowers or silences their communities. Considerations include ensuring fair and accurate reporting that engages with the context in which data is situated; monitoring for bias; and the care with which analysis is framed and presented. This process benefits from direct engagement with client communities, as qualitative data can be used to contextualize quantitative analysis, including checking to see if data analysis aligns with lived experience.

• **QUALITY:** The accuracy, completeness, and consistency of data, which ensures data is trustworthy and provides a strong evidence base for decision-making and data narratives. Agencies should establish a clear internal target for data quality and practices for managing inaccurate, incomplete, or inconsistent data.

Evaluate current practices

- **COLLECTION:** What is collected, how and when the collection takes place, and the establishment of culturally safe spaces for data collection. Informed consent requires that staff be able to explain why they are collecting data and what it will be used for. It is also important to understand power relations and the sensitivity of personal data in order to establish culturally safe collection practices. There are many methods for collecting data, ranging from direct questions (as in a client intake) to observation (for example, by settlement workers who then record their observations in case notes), to focus groups and surveys. Note that surveys can produce quantitative data through scaled questions (e.g. "Rate your experience with this program on a scale from 1 to 5") and qualitative data through open-ended questions. Each method gives slightly different data, provides different context to that data, and varies in accessibility (for example, surveys rely on literacy in the language used), so consider who you want to reach, exactly what you want to know, and what methods are most inclusive for that group of people. Remember that accessibility results in more accurate data.

COLLECTION METHODS

There are many ways to collect data. As you decide what data your organization needs, consider how best to collect it. In 1:1 interviews, such as client intakes? Through observations recorded via case notes? Via scaled response or open-ended surveys? Focus groups? Whatever method you choose, be intentional about accessibility and think about who might get left out.

- **CURATION:** Where and how data is stored, the protections in place for client privacy, database structures, cleaning and processing data for use, and metadata. Both privacy legislation and contract stipulations may place requirements for how data is stored and protected. Another aspect of curation is how databases are structured; it is recommended that agencies establish database structures that enable disaggregation based on the factors identified in the previous stage.

- **MONITORING AND EVALUATION:** Ongoing monitoring and regular evaluation ensures data practices are consistent and continue to meet standards and needs over time. This may include regular audits for data quality, reviewing curation and privacy protections, and providing training and resources to staff responsible for collecting data, among many other possibilities. GBA Plus needs, agency values, and data equity principles need to be built into any monitoring and evaluation framework.

DATA BIOGRAPHIES

Metadata is basically the story of how data came to be. Much like a biography of a person, or a news article covering an event, metadata describes the Who/What/Where/When/Why/How of the data's collection and processing. This provides subsequent users with context that helps them understand the limitations, possibilities, and ethical implications of a collection of numbers.

It is productive to have multiple people involved in this process. This is both because the information required to conduct a thorough evaluation is rarely held by only one person, but also because multiple viewpoints help to counteract the biases individuals cannot see on their own.

CONSIDERATIONS FOR DEMOGRAPHIC DATA

In the previous section, both organizations in the case studies identified demographic data as key to their purposes. It is important to note that demographic data requires special consideration in its collection, curation, and use. More than any other kind of data, demographic data directly represents the people from whom it is gathered. It is information that can be linked directly to specific people unless it is anonymized and aggregated with the information of other individuals. This is one reason some analysis omits certain categories – if there are too few people of a particular identity, it is much easier to identify individuals, stripping from them the protection of anonymity.
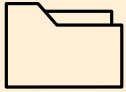
CASE STUDY A

ORGANIZATION A brings together their staff to discuss their current data practices. During this evaluation, they find several opportunities to build the practices they want through a data management strategy.

They currently collect limited demographic data, primarily for funder reporting, so they have no internally set standards beyond those required for reporting. This means they will be able to consult with newcomers and staff to set updated internal standards that represent the clients they serve. They also receive regular reports from IRCC with statistics about their work. To ensure that they will be able to compare their internal data to external data (such as reports from IRCC or Statistics Canada), they want to balance those consultations with standards used by the Government of Canada, information that is available on the Statistics Canada website. This also means that they can work with their database contractor to design data fields (rather than having to retrofit existing fields), and they will be able to set up quality targets that best represent their goals.
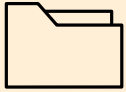
When looking at their data collection practices, they find a pivotal strength – staff are experienced and skilled at building rapport and trust, which they can draw on to create guidelines for collecting data. For example, staff's strong relationships with their clients reveals that clients feel especially hesitant to share information about their sexual orientation and/or gender-expansive identities. Even when clients feel safe disclosing that information to staff, sometimes they request that staff not record that information. This means that work will need to be done to create an environment where clients feel confident that their information is safe with the organization.

This understanding leads them to highlight *data management must balance public good and personal privacy* when they return to Worksheet 3 – while it would be beneficial for the organization to know this information about their clients, they need to balance that with respect for clients' rights to make decisions about their own data. This ties in with one of their agency's values – respecting the autonomy and personal journeys of newcomers – which they also record on Worksheet 3.

CULTURAL SAFETY

The Government of Canada Public Health Authority defines cultural safety as "an outcome based on respectful engagement that recognizes and strives to address power imbalances" that are an innate part of a system.

This concept arose from interactions between Indigenous New Zealanders and the healthcare system, but it is relevant in any contact between a minoritized person and a larger system. There are a number of Indigenous-led organizations in Canada who provide cultural safety trainings for a variety of contexts.

Evaluating Data Practices

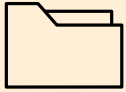| Standards	Collection	Quality
• Few set internally • Do receive statistics from IRCC using Government of Canada standards	• Excellent rapport and relationships with clients • Strong organizational commitment to cultural competence and safety but no formal trainings • Currently collect limited demographic data, but database can support more robust data • Do have case notes field in database which can be used to track client needs and progress	• Do not currently conduct data audits • Are well-situated to set quality targets
Curation	**Analysis**	**Monitoring**
• Database meets privacy requirements • Strong relationship with contractor • Desire ability to perform disaggregation	• Currently limited by available data • Strong established relationships with newcomers and communities	• No structures currently in place • Ability to build in practices as part of strategy
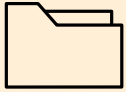
Evaluating Data Practices

CASE STUDY B

ORGANIZATION B finds, when they evaluate their data practices, that they already collect a lot of the data they want. The demographic data they currently collect does not quite match what they need to meet their goals, so they will need to bring those into alignment.

More importantly, they find that each team or department has slightly different practices with respect to collecting, entering, and using data. This is problematic for comparing data across the organization, but it does give them the opportunity to create guidelines that build on the best practices arising from a variety of experiences with data within the context of their organization. They also benefit from a staff composition that is a reasonable reflection of their current understanding of the diversity of the newcomer communities in their area. They note this on Worksheet 3 as a data equity measure supporting the principle: *Data is subject to bias.*

Consultation with their database contractor uncovers capacity within the database structure to develop functions that meet their data needs. For example, although they do not currently audit their data for accuracy and completeness, their database has untapped capacity to do so. Exploring this facet of data work resonates with their agency value of excellence, which they enter on Worksheet 3.

When looking at the ways they currently analyze their data, they find that regular program evaluation is an established practice, but that a lack of disaggregated data means that they have not been able to fully support GBA Plus intersectional analysis, an issue which they record on Worksheet 3. On the other hand, they also realize that their active and ongoing engagement with newcomers and their communities presents opportunities to consult on self-identification labels (for data collection and curation) as well as learning about questions clients have that agency data work could answer, and they make a note to consider engagement methods in the next phase: designing their data management strategy.

Evaluating Data Practices

Standards	Collection	Quality
• Inconsistent across teams • Inconsistency limits interoperability • Demographic data does not fully support data goals	• Already collect much of the desired data • Staff composition reasonably reflects populations served • No standard training on collection practices • Do not currently track milestones	• Do not currently check for accuracy or completeness • Discover this capacity is available within database

Curation	Analysis	Monitoring
• Database meets privacy requirements • Allows disaggregation by demographics, but not collation with program statistics • Strong anonymization capacity	• Regular program evaluation well-established but lacks disaggregation • Active, ongoing engagement with newcomer communities presents opportunity for consultation	• Each team manages their own data checks • No agency-wide structures currently in place

3

Reflecting on GBA Plus and Equity
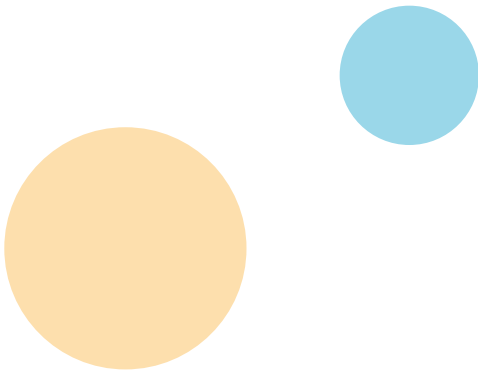
This worksheet provides questions for reflection. Consider posting these questions prominently as you complete the worksheets in Appendix B. As part of this process, consider how you want to engage in GBA Plus, where your agency's values are supported or contradicted by existing data practices, and which data equity principles are most relevant to your work.

3A Assessing GBA Plus Data Capacity

Identify Issues	**Challenge Assumptions**	**Gather the Facts**
What structures do we have to support GBA Plus analysis?	What identity factors are we seeing among our clients?	What analysis are we doing?
What disaggregation are we able to perform?	What do we think we know about their impact on client experiences?	What analysis do we need to answer our key questions?
How are we tracking and defining success for our clients?	What does the data show?	What data do we have and where are the gaps?

3B How do our data practices uphold our values as an agency?

Agency Value:	**Agency Value:**	**Agency Value:**

Reflecting on GBA Plus and Equity

3C Assessing Data Equity Measurements

Data represents people.
How are we ensuring that our strategy treats our clients and their data with respect?

Data is subject to bias.
How are we guarding against bias at each stage of the data lifecycle?

Data has consequences.
How are we ensuring fair and accurate representation of our clients?

Data does not exist in a vacuum.
How are we considering context in our data work?

Data must balance public good with personal privacy.
How are we balancing the needs of the agency and the needs of newcomers?

Data management is a learning process.
What accountability measures do we have in place?

Design data management strategy

Once agencies understand what data they need, the purpose it fulfills, and how current data practices align with these needs and priorities, they are ready to design a data management strategy.

- Worksheet 4 provides a template for designing data practices that meet the data needs identified through Worksheets 1 and 2.

- Worksheet 5 draws from Worksheet 3 to articulate the role GBA Plus, agency values, and data equity principles play in your strategy.

During the design phase, use these questions to frame the transition from identifying needs and evaluating practices to developing policies and practices.

- Where do existing data practices align with GBA Plus and data equity principles? Where can this alignment be strengthened?

- What strengths can the agency use to improve data equity and support intersectional analysis?

- What steps are necessary to bring data practices in line with data needs?

- What strengths can the agency deploy to address data gaps?

- What resources are available for this process? What resources (funding, training, etc.) will be needed to make these changes?

Hiring practices that support diverse staff can help to ensure a variety of perspectives on data within the organization, as can direct engagement. Diversity among newcomers means they cannot be treated as a monolithic group. Agencies should consider ways to engage with groups, such as newcomers with disabilities; from different ethnic, cultural, linguistic, and religious backgrounds; of different immigration statuses and streams; LGBTQIA+ newcomers; and other groups, remembering that differences exist within groups as well as between them. When designing engagement strategies, consider how data represents, silences, and empowers communities.

USING THIS SECTION

In this section, you will bring together the results of the previous sections—Identifying Data Needs and Evaluating Data Practices—to design a data management strategy for your organization.

Use this section in three ways:
1. Read through the text.
2. Reflect on the case studies.
3. Complete the accompanying Worksheets using the data gaps from Worksheet 1 and Worksheet 2 and the agency values and data equity principles identified through Worksheet 3.

Remember to consider your GBA Plus data goals from Worksheet 3 as you design your data management strategy.

Your strategy should include:

- A description of the principles and values that govern your agency's data work;

- An overview of the purposes data fulfills within the agency, including a section on how GBA Plus analysis is supported and managed;

- Internal guidelines for equitable data management through core practices;

- Training and resources to support those guidelines; and

- Accountability measures, including ongoing monitoring and evaluation procedures.

- Logistics, including budgetary requirements, may also be included.
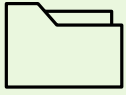
CASE STUDY A

**ORGANIZATION A** compares their identified data needs (Worksheet 1 and Worksheet 2) to the evaluation they conducted in the previous phase (Worksheets 3 and A1-A6). The most prominent need they have identified is strengthening their disaggregable demographic data. To meet that need, they know that they need two things: demographic data (which will need to be collected directly from clients) and database structures enabling disaggregation. They identify staff who are invested in this process and committed to equity in their work; the strong relationships that exist between clients and the organization; and their connections with the database contractor as key resources. They decide that they need to update their existing data standards (including labels and categories) and build in new standards for the data they will begin to collect, design database report templates with the support of their database contractor, and develop staff training on data collection and cultural safety. To support these action steps, and to keep them grounded, they decide to begin by connecting with clients and staff to establish data standards that align with how clients self-identify – for example, with respect to ethnocultural identities.

THE RIGHT DATABASE

There is no One Right Database. Selecting the right database or CRM software for your agency is a complex process balancing cost and ease of use against the capacity to provide the functions required to meet your data needs. That is beyond the scope of this guide—just remember that fully engaging with GBA Plus requires the ability to track demographic data and usage statistics, and to disaggregate that data for analysis.
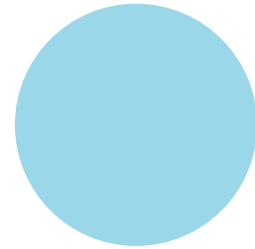
| Data need ⟶	Data gap ⟶	Resources available ⟶	Action steps
Recorded on Worksheet 1 • Disaggregable demographic data	• Demographic data • Database structures for disaggregation	• Engaged staff • Strong client relationships • Database contractor relationship	• Client engagement • Set data standards • Design database report templates • Develop staff training
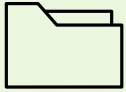
CASE STUDY B

ORGANIZATION B evaluates their existing data practices, and finds that the quality of their data was not where they wanted it to be. They already collect most of the data they want, but variations in standards and practices limit their ability to check data quality. To do this, they pull together the various teams and departments to build a best practices data collection and standards guide drawing on the successes and challenges each team has encountered. They also set a data quality goal of 95% complete data in their database, and work on a process for conducting a regular audit of data in their possession.

Data practices ⟶	Goals ⟶	Resources available ⟶	Action steps
From Worksheets A3 & A6. • Data quality • Monitoring	• Consistent standards • Quality metrics • Regular data audits	• Staff knowledge • Statistics Canada data literacy resources	• Develop best practices guide • Set data quality goal • Establish audit practices and schedule
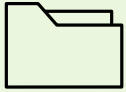
CASE STUDY A

ORGANIZATION A looks back at the principles of data equity they explored through Worksheet 3 as part of developing their strategy. The concerns of LGBTQIA+ newcomers, and their fears of being outed in a small community, have stuck with the team. This understanding leads them to connect most strongly with two of the principles from pages 8-9: *Data represents people* and *Data has consequences*. They decide that there are two sides to respecting client identities and the data associated with them – accurately recording the information clients share, and clearly understanding the limits and boundaries clients set around the use of their personal information. For the first part, their related activities include adding fields to client profiles so that preferred names and pronouns are prominently displayed. For the second, they want to work with their contractor to add an equally prominent field where staff can record when to use the name and pronouns (e.g. only in one-to-one meetings, all the time, etc.) as well as engage staff in training around informed consent and cultural safety.

Example A

Equity principles
- Data represents people
- Data has consequences

↓

Alignment
- Importance of self-identification
- Client consent and boundaries

↓

Activities
- Add client name and pronouns to profiles
- Add field to note disclosure and use limitations
- Staff training on informed consent and cultural safety

CASE STUDY B

ORGANIZATION B also refers to Worksheet 3 as they look at their data narratives from a GBA Plus perspective (see pages 6-7), clearly outlining the relationship between GBA Plus and their analysis goals: they want to use disaggregated data to Challenge their assumptions about program use and help identify gaps, with the goal of creating better outcomes for diverse newcomers in their city. To support this, they feel strongly that they need to integrate another data equity principle from page 9 – *Data does not exist in a vacuum*. Because their data goals include program evaluation, they want to make sure that they are taking into account context that may not appear in the numbers. To do so, they develop a client satisfaction survey; deciding that it would be beneficial to conduct this survey on a regular basis, they document their process in order to build a set of guidelines for future surveys.

Example B

Equity principles
- Data is subject to bias
- Data does not exist in a vacuum
- Challenge assumptions

↓

Alignment
- Active client engagement
- Misalignment of practices with GBA Plus

↓

Activities
- Establish disaggregation processes
- Incorporate client satisfaction survey

4 | Designing for Data Needs

Refer to Worksheet 1 and Worksheet 2 to fill in the Data Need boxes below. Determine the method for collection (such as client intake interviews, surveys, etc.). Consider the resources your organization has available to you—funding, time, expertise, relationships, partnerships, etc.—and formulate action steps to address the gaps. You may end up using multiple copies of this worksheet. This process benefits from collaboration.

4A Data Need	**4A** Data Need	**4A** Data Need
(From Worksheet 1C)	*(From Worksheet 1C)*	*(From Worksheet 2E)*
4B Collection Method(s)	**4B** Collection Method(s)	**4B** Collection Method(s)
↓	↓	↓
4C Resources available to address need	**4C** Resources available to address need	**4C** Resources available to address need
↓	↓	↓
4D Action Steps	**4D** Action Steps	**4D** Action Steps

To complete this worksheet, use the results of your reflections as recorded on Worksheet 3. Carry over the agency values identified in section 3B and identify the data equity principles from section 3C that resonate most with your organization's work and culture. Consider how your data practices can best reflect those values while still meeting the data needs described on Worksheet 4. Be strategic about the specific values and principles you want to address. You may need more than one copy of this worksheet.

5A **GBA Plus**
(From Worksheet 3 Section A)

What structures are we implementing
to support GBA Plus analysis?

What types of analysis are we conducting?

What identity factors are we accounting for?

→ **5D** **How is this integrated into our strategy?**

5B **Agency Value:**
(From Worksheet 3 Section B)
Example: Integrity

→ **5E** **How is this integrated into our strategy?**

(Example: We hold ourselves to a high standard when protecting client privacy and confidentiality. We have set accountability measures to mitigate possible bias and produce analysis that is empowering rather than harmful.)

5C **Data Equity Principle:**
(From Worksheet 3 Section C)
Example: Data is subject to bias.

→ **5F** **How is this integrated into our strategy?**

(Example: We base our standards on consultation with clients, train our staff to collect data in a non-judgmental manner, and filter our analysis through a collaborative team of diverse backgrounds.)

Implement data strategy

The revision of existing policies and introduction of new ones is a process. Implementing a data management strategy may entail significant changes to how the agency collects, stores, and uses data.

Ground this process in the desired organizational changes and in the identified data needs and goals. Remember that developing consistency requires more than writing out a manual: it demands the integration of data equity principles, including engaging with staff to ensure consistent understanding of the data management strategy and its purpose. Implementation also means learning how the data management strategy, once put into practice, achieves or misses the desired results, including how it affects, benefits, or hinders the work of staff and the experiences of clients.

Because it can be difficult to anticipate how policies will impact diverse groups, it is essential that the implementation stage be treated as flexible. Worksheet 6 provides some guiding questions, including incorporating a process for checking in with staff and clients to identify any unintended consequences, mechanisms for both staff and clients to provide anonymous feedback, and a plan for how to follow up on concerns for further details and possibilities for addressing these issues. A designated strategy lead, team, or committee may be best positioned to follow through with investigating and proposing adjustments to the strategy.

The necessary program and policy developments and interventions may need to be implemented over time. Use Worksheet 7 to develop a timeline with appropriate steps, including time to test and evaluate new tools, procedures, and policies. In accordance with the design phase, ensure that the proper tools and training are provided to staff. Investigate what tools and training are available that align with the agency's strategy and goals. Consider cross-agency collaboration if other organizations in the sector are also developing data management strategies in order to share the resource burden of developing tools and training. While it is important to consider the role of each practice, organizational priorities and/or resource limitations may require agencies to focus on a few key practices at a time.
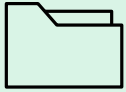
USING THIS SECTION

Throughout this section, you will be asked to consider both the logistics of implementing the strategy you designed in the previous section as well as equity concerns for the manner in which you enact these practices.

Use this section in three ways:
1. Read the explanatory text.
2. Reflect on the case studies.
3. Complete the Implementing Data Practices worksheets for the core practices you are focusing on.

Your organization might focus on some, most, or all of the practices described in Phase 2 depending on your needs and resources.

Once the data management strategy has been tested, proved to uphold data equity and achieved the desired results, agencies can move from this stage to ongoing monitoring and evaluation.
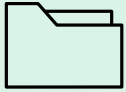
CASE STUDY A

ORGANIZATION A begins to put their strategy into practice by connecting with clients to inform the standards for the new data they will be collecting. While they want to be able to compare their data with Government of Canada datasets (such as IRCC and Statistics Canada), they also want to make sure that the categories and labels they use accurately reflect how their clients self-identify. They do this both through informal conversations between settlement workers and clients as well as through social events – at a semi-regular cultural event, they set aside some time to talk about data with the newcomers who are attending.

Once they have the categories and labels they intend to use, they begin training staff on the newly designed protocols for data collection and entry. They test out the changes made to their database. As they work through this process, they realize that it would be beneficial to create a living data guide for current and future staff that goes through the new practices, why they exist, and also orients new database users. As they continue to work with the database, they add new knowledge to this document. They also set up a schedule for when they run reports as well as two ways for staff and clients to leave anonymous feedback: a box for written comments in a shared space, and an online survey through Google Forms which people can complete as many times as they want.

Policies	Practices	Trainings	Accountability
• Demographic data collection at intake • Entry into database along with needs assessment	• Demographic data considerations • Informed consent • Database processes	• Cultural safety • Privacy and consent • Data standards • Database use	• Comment box and Google Form • Staff meeting discussions • Client engagement fora

CASE STUDY B

ORGANIZATION B develops a standardized intake form based on the best practices from each team and department, which they distribute across the agency. As part of this rollout, they use their quarterly all-staff meeting to conduct a training session to make sure everyone is familiar with the changes. Prior to this training, they encourage staff to watch videos from Statistics Canada's data literacy video series.

Once these new practices are in place, they give staff two months to adjust to the changes before launching their first data audit as part of the strategy. Over the next six months,

they begin to see an increase in the completeness and consistency of their data. Using these audits, they also notice patterns in which fields are most frequently unanswered, and which fields often have write-in labels. They can use this information to explore the context for these responses, which will allow them to update their standards and/or provide targeted support to staff. To keep their journey-mapping project moving forward, they expand their database report templates to support disaggregation and begin pulling these reports to analyze.

Policies	Practices	Trainings	Accountability
• Consistent data standards across teams • Regular audits • Data quality procedures	• Standardized intake form • Data quality targets • Management of missing, incomplete, or invalid data	• New intake training • Statistics Canada data literacy series	• Data audits • Training completion • Training feedback survey

WORKSHEET 6:

Implementation Planning

Use this worksheet to systematically outline the processes for implementing the data strategy designed through Worksheet 4 and Worksheet 5. Consider logistical questions as well as how this implementation can be done in alignment with principles of equity and agency values.

6A Logistics	**6B** Equity
Who is taking the lead on this process?	What data equity principles are we prioritizing?
Who is being consulted in this process?	How are we integrating those principles?
What core practices are we focusing on?	How are we assessing equity?
How are we defining success for our data management strategy?	What identity factors have been taken into account (e.g. race, immigration status, etc)?
How are we measuring this success?	Are the policies, guidelines, and/or trainings provided to staff accessible and inclusive?
	How can staff and clients provide anonymous feedback during this process?
How are we checking in with our staff about the effects of this strategy on their work?	What mechanisms do we have for following up on concerns?

7 | Implementing Core Practices

This worksheet is best completed after completing Appendix B. Take the action steps from those worksheets and from Worksheets 4D, 5D-F, and 6A-B to lay out how your agency will work with data, using the core practices described in Phase 2 and in Appendix A.

7A Core Practice:

7B Policies

-
-
-

7C Practices

-
-
-

7D Training & Resources

-
-
-

7E Accountability Measures

-
-
-

7A Core Practice:

7B Policies

-
-
-

7C Practices

-
-
-

7D Training & Resources

-
-
-

7E Accountability Measures

-
-
-

Monitor and evaluate data strategy

The final stage of data management is the establishment of monitoring and evaluation mechanisms.

At this point, the organization moves from the iterative process of implementation and refinement to ongoing monitoring and periodic evaluation as laid out in the data management strategy.

There is no one set method for managing this aspect of data management, but it is important to frame the associated processes using data equity principles and GBA Plus considerations. This process can incorporate and build on the data evaluation stage explored earlier in this guide, but it can also be developed in line with existing agency measures for monitoring and evaluation.

USING THIS SECTION

At this point, you have a data management strategy designed and in place. In this section, you will consider its impacts to gauge its effectiveness and to set up a system enabling future evaluations.

In this section you can:
1. Read the explanatory text.
2. Reflect on the case studies.
3. Complete the Monitoring Data Equity worksheets.

These worksheets ask you to look critically at your data practices (feel free to reference the Evaluating Data Practices worksheets in Appendix B) both logistically and in terms of equity.

Some key questions that should be considered include:

- Who is checking for alignment with data equity and GBA Plus? How are we integrating and amplifying diverse perspectives into this process?

- How are our practices upholding principles of data equity?

- What intersectional analysis are we supporting with our data? Are there gaps?

- Are we able to support the data narratives we want to tell with adequate evidence?

- Are our practices in line with the most up-to-date legislation, contract stipulations, and commitments we have made?

- Does our data meet the quality standards we set for ourselves?

- Where are we excelling at data work, and where are our areas for growth?

- Are our data practices responsive to our needs as they develop and change?

- Are we checking qualitative data from newcomers to ensure our quantitative data is consistent with their lived experiences? How are we investigating incongruities?

- How is our data work empowering or disempowering the newcomers we serve?

This process may include internal audits for data quality, regular training and refresher opportunities for staff, and consultation with newcomer communities to ensure the agency's data reflects the experiences and needs of diverse groups. It must include consideration of impacts and gaps across diverse groups, as it is possible for data work to empower some groups while silencing others.

Finally, ensure there is a process in place for the results of monitoring and evaluation to result in timely adjustments to data policies and practices. An organization's data priorities may change over time, and it is important for practices to reflect those shifts. As well, equity is a constantly negotiated process and the activities needed to support it will change over time. An equity-driven data management strategy needs built-in flexibility that supports these adaptations.
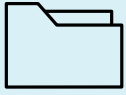
Community Impact & Agency Practices

CASE STUDY A

ORGANIZATION A is scheduling regular open forums for clients to build relationships and have open conversations about equity. In addition, they establish data as a regular agenda item at their recurring staff meetings. Part of these forums is presenting the data analysis that was conducted over the past quarter, including changes in program usage, enrollment, withdrawal, or in client demographics – for example, connecting with staff about increases in clients from certain areas or of certain identities. At one point, they notice they are seeing a noticeable increase in clients from Uganda, so they decide to bring these clients together and talk to them about their experiences and needs. Staff are encouraged to pay close attention during data collection and to make note of any questions that seem to make clients uncomfortable with an eye toward adjusting data collection through label changes or training and environmental shifts (such as toward or away from enclosed offices).

Example A: Community Impact

Whose voices are we hearing?
Who might be going overlooked?
Bringing together clients and staff for conversations about equity; data is a regular topic. Not everyone is able to attend these events, so staff also make an effort to connect and share with clients.

Where and how is our data work empowering the communities we serve?
Connecting with community organizations to share data gives them more tools to further their own work. Providing data directly to clients puts some of the control back into their hands.

Where and how is our data work silencing or disempowering the communities we serve?
There is some concern that focusing on the equity forum events misses clients—both ones with more privilege and ones with the least.

CASE STUDY B

ORGANIZATION B works with each department and team to create methods for staff to engage with clients about data work. They decide that they want data equity to be an ongoing commitment, and the organization's Equity Committee adds data to their area of concern. They also set a schedule for data audits (to assess data quality) and for a regular Client Feedback Survey, which allows them to check the quantitative data in their database against the qualitative data produced by client testimonies about their experiences. These measures allow them to see how their data supports the equity-driven work in which they are engaged as well as checking how equitable their data processes are. These practices are connected to their data equity commitments from Worksheet 5 – *Data is subject to bias* and *Data does not exist in a vacuum*. This also helps them keep GBA Plus at the center of their work, as they challenge their assumptions and consistently consult with the newcomers they serve.

Example B: Agency Practices

Who is responsible for checking alignment with data equity & GBA Plus?
Equity Committee has taken on data as part of its portfolio, both how data works for equity and how equity plays out in data practices.

What role do diverse perspectives play in this process?
Each team or department is represented on the Equity Committee; the selection process includes diversity guidelines.

Where are we checking our quantitative data against the lived experiences of our clients?
The Client Feedback Survey is instituted as an annual practice.

Monitoring Data Equity

Once a data management strategy is in place, it must be monitored for both effectiveness and for adherence to the agency's commitment to equity. This sheet focuses closely on equity; use the questions as a starting point when you consider how your work can be assessed for adherence to equity principles on an ongoing basis. Draw on Worksheet 5 and Worksheet 6 to develop mechanisms for investigating answers to these questions.

8A Community Impact

Who is responsible for checking alignment with data equity & GBA Plus?

What role do diverse perspectives play in this process?

Where are we checking our quantitative data against the lived experiences of our clients?

How are we supporting staff in their work with data? (e.g. ensuring our policies and practices are accessible, responding to feedback and concerns, etc.)

8B Agency Practices

To which groups and stakeholders are we accountable?

Whose voices are we hearing? Who might be going overlooked?

Where and how is our data work empowering the communities we serve?

Where and how is our data work silencing or disempowering the communities we serve?

8C **Where are we excelling?**

8D **Where can we grow?**

8E **How are we responding?**

Monitoring Data Practices

While the previous worksheet focuses most closely on equity, this worksheet is where you will consider logistical concerns. The worksheets from Appendix B may provide a helpful framework for answering the questions below on an ongoing basis. As part of this process, set a regular schedule for evaluation.

9A How well do our data practices...

Meet our internal quality standards?

Provide what we need to make strategic, data-driven decisions?

Support our data narratives with the right data for the intended audience?

Enable the intersectional analysis we need?

Respond to our changing needs and the needs of our clients?

9B How do our practices align with...

Privacy legislation?

Contract stipulations?

Agency values?

Accountability standards?

Data Equity principles?

GBA Plus requirements?

Internal frameworks, such as IDEA?

9C Where are we excelling?

9D Where can we grow?

9E How are we responding?

CONCLUSION:
Weaving it all together

This final section provides suggestions and a sample template for drafting a comprehensive data management strategy.

USING THIS SECTION

This final section is the place where all of the information developed through the worksheets in the preceding phases is brought together to draft a complete Data Management Strategy.

In this section, you will be able to:
1. Read an explanation of areas you may want to include in your strategy.
2. Make use of the sample template as a starting point to draft your own Data Management Strategy.
3. Explore examples from the two case studies for how some sections of the template could be completed using information from the worksheets in previous sections.

The template provided is only a sample—you are encouraged to develop a strategy in accordance with your own internal procedures.

The template provided here is only one way to organize a data strategy. Agencies may also choose to create a strategy following the outline established through completing the worksheets in previous sections, or to use an internal process and organization method that better fits their context.

When bringing these pieces together, consider including the following sections:

PRINCIPLES: The values under which the agency works with the data of its clients, drawn from the answers generated for Worksheet 3 and Worksheet 5. This could include a description of the agency values identified on these worksheets; any data equity principles that resonate with the organization's work, which may draw on the language and concepts on pages 8-9 of this guide; and the organization's particular commitment to GBA Plus to tailor services for the specific needs and barriers of diverse newcomers.

PURPOSES: Use the questions and narratives created through Worksheet 1 and Worksheet 2 to describe the uses to which data will be put identified through those worksheets.

- This section can also include information from Worksheet 7 if Analysis and Use was one of the core practices for which your agency completed this worksheet.

DATA TO BE COLLECTED: Draw from Worksheet 4 to list the pieces of data needed to meet the data needs described under Purposes. Using this section of the data management strategy to precisely track what data needs to be collected provides a consolidated place where data practices can be reviewed and updated in accordance with changes in agency priorities and data needs.

- Consider listing specific categories of demographic data to be collected, such as age, gender identity, population group, and religion, as well as whether information about program enrollment, outcomes, milestones, and/or client satisfaction will be used. Alongside this information, include the methods by which this data will be gathered, such as during client intakes, from case notes, through surveys, and any other collection methods to be used.

- Consider determining and including the intervals at which this data will be collected – for instance, only at intake (and whether that data can or will be updated if information changes), through annual surveys, etc.

CONCLUSION:
Weaving it all together

PRIVACY PROTECTIONS: Use the notes from Worksheet A4 and Worksheet 9 to outline the measures in place to protect client privacy, including the intervals at which measures will be reviewed and updated. Work out specifics with the vendor responsible for the client database; it can be beneficial to include information such as the vendor, contact information, and process for reviewing and updating privacy protections in this section.

- Information about how the organization handles informed consent, including the mechanism by which clients can withdraw their consent at a later date, can be outlined here or in the next section on policies and practices.

POLICIES & PRACTICES: This section outlines specific policies developed through the data management development process. It is used to describe how you will engage in the various stages of the data lifecycle.

- Use Worksheet 7 for the policies and practices associated with core practices, such as how data metadata is handled. The worksheets from Appendix B may also be useful. Practices set aside to evaluate at a later date can be mentioned in brief here.

- Consider including in this section specific language connecting these practices to the principles outlined in the section on principles at the beginning of the strategy – for instance, the method(s) used for intersectional analysis as outlined under GBA Plus on Worksheet 5, or how bias is checked and mitigated through practices like data collection or analysis.

TRAINING & RESOURCES: In this section, describe the training and/or resources available to staff. This may include requiring staff to complete online trainings, such as the Statistics Canada Data Literacy Series; internal trainings on the policies and practices outlined in the previous section, such as data collection guidelines; and documents such as this strategy or a user guide to the database or CRM software in use at the agency.

- Use Worksheet 7 for the training and resources developed through this process.

MONITORING & EVALUATION: Here you will lay out the accountability measures you have developed. This may include information about how data quality is assessed, how practices are monitored for equity, and how the agency will engage with clients, stakeholders, and communities to ensure accountability. This should include targets for data quality (most often expressed as a percentage, e.g. "All client file data is at least 85% complete with 90% accuracy") as well as a schedule for when audits occur and any remediation procedures if the audits uncover a gap between data quality and targets.

- Worksheet 8 and Worksheet 9 should provide the processes you developed for which data practices are monitored and evaluated on an ongoing basis and how that is done.

AMENDMENT AND IMPLEMENTATION PROCEDURES: For this section, you will want to describe when and how this strategy is amended. This may include things like a procedure for regular updates of data standards through consultation with clients, avenues for staff to express challenges and concerns and a method for updating policies, training, or resources that will improve staff's ability to work with data, and any other guidelines that facilitate this process.

- Worksheet 6 can be used for specific measures, such as ways staff and clients can provide feedback, including anonymous feedback, and how the agency follows up on and addresses these concerns.

- Worksheet 8 and Worksheet 9, on monitoring equity and practices, also provide valuable information, as you may include some of the questions and answers from these worksheets to describe your amendment procedures.

WORKSHEET 10:
Sample Template for a Data Management Strategy

10

This sample template is intended to provide inspiration and guidance as you develop your own strategy. Each section below includes a reference to a specific worksheet section so that you can make use of the work you've done throughout your use of this guide. This template is not intended to supersede existing processes within your agency, only to provide a starting point.

Begin by stating the principles and values that govern how you work with data.
This explains why the practices in this strategy are important and provides a basis for accountability.

GBA Plus	**Agency values**	**Data Equity**
(Draw from Worksheet 5A)	(Draw from Worksheet 5B)	(Selected principles from Worksheet 5C)
·	·	·
·	·	·
·	·	·

Clearly lay out the purposes for your data work; why do you collect data? How do you use it?
(Draw questions and narratives from Worksheet 1A and 2A and/or data needs from Worksheet 4A)

E.g. Funder reporting (May lump funders into a single category or list individually)	*E.g. To support GBA Plus intersectional analysis enabling tailored services responsive to the unique needs of diverse newcomers*	**Other purposes and narratives**
		·
·		·
·	·	·

List the data you collect based on the purposes identified above. Consider referring to data equity principles for possible language about why collection is limited to these areas.
(Draw from Worksheet 4A)

Describe the measures taken to ensure client privacy.
(Draw from Worksheet 9B and develop in coordination with IT and/or database vendor)

E.g. We collect the following demographic information (list factors such as age and gender)	**Other data collected and its method, such as satisfaction surveys.**
·	·
·	·

·
·
·
·

Sample Template for a Data Management Strategy

Outline the specific policies and guidelines that explain how you meet your data needs while upholding the values and principles listed in the first section:

Equity-focused policies (Worksheet 5D-5F):

-
-
-
-

Core Practices (Worksheet 7A-7C):

-
-
-
-

Describe the training and resources available to staff, internally or externally, to ensure they have the support they need to follow the policies and guidelines in the previous section:
(Draw from Worksheet 7D)

Internal Training:

-
-
-
-

External Training:

-
-
-
-

Resources:

-
-
-
-

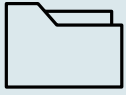**Lay out the accountability measures used to ensure your organization upholds its data values.**
(Use Worksheets 8A-B and 9A-B; may include equity integration from Worksheet 5D-F)

-
-
-
-

Describe mechanisms in place for revising this strategy at need, including ways to receive feedback from staff and clients.
(Draw relevant language and concepts from Worksheet 9)

-
-
-
-

Data Management Strategy

Below are sample sections of the data management strategies developed by our case study organizations. In a full strategy, each section would have multiple entries (as suggested in Worksheet 10), but the case studies below provide sample language that may be useful to your organization.

> *We affirm our commitment to equity throughout the lifecycle of our data.*
> *The following are the principles under which we operate with respect to data:*

CASE STUDY A

ORGANIZATION A uses Worksheet 5 to draft the following:

We recognize that data represents people and commit to treating our clients' data with the same respect we extend to their person-hood, including valuing self-identification. One concrete activity that demonstrates this commitment is engaging clients in determining our data standards, such as population group identifiers. Another is recording clients' preferred name and pronouns and using them in any context where they feel comfortable having them used.

CASE STUDY B

ORGANIZATION B uses Worksheet 5 to draft the following:

Our organizational integration of GBA Plus includes a commitment to challenging our assumptions. Because we recognize the role bias can play in data processes, we have made this a priority item for our Equity Committee. We draw on the lived experience of clients through mechanisms like an annual client satisfaction survey to put our quantitative data in context and challenge our assumptions about different groups of newcomers and their experiences with our services.

> *Our agency has identified the following purposes for the data we collect:*

CASE STUDY A

ORGANIZATION A refers to Worksheet 2 to draft the following:

As part of providing the best possible services for our clients, we use data to understand who we are serving in order to build relationships with community organizations who provide similar services or support overlapping populations.

CASE STUDY B

ORGANIZATION B draws on Worksheet 1 to draft the following:

We use data to understand how diverse groups of newcomers experience our services, connecting demographic data collected at client intake with progress notes and satisfaction surveys to see how intersecting identity factors impact service usage and benefits.

> *To support these practices and principles, we have developed the following policies and guidelines:*

EQUITY-FOCUSED POLICIES

ORGANIZATION A brings together the evaluation action steps from Worksheet A2 and the design from Worksheet 4 to draft this section:

One key step to ensure access to quality data is collection. We train our staff to collect data in a culturally safe manner through strong rapport and cultural humility, ensuring staff have a strong understanding of informed consent, including why each piece of data is collected, how it is protected and used, and what it means for a client to consent to sharing their personal data.

CORE PRACTICES

ORGANIZATION B refers to Worksheet 7 to describe this measure:

To ensure high-quality data, we conduct twice-yearly audits of all active client files to ensure our data is complete, accurate, and valid.

Data Practices Evaluation Guide

The following section outlines the core practices of data management.

An evaluation of data practices should address each function across the data lifecycle to ensure that data processes meet all applicable requirements as well as supporting agency data needs and goals (as identified on Worksheet 1 and Worksheet 2). The Data Evaluation Worksheets in Appendix B include guiding questions for agencies to use in their evaluation process, while this section provides more information about each core data practice alongside suggestions for possible activities when carrying out the evaluation. The Key Data Terms may also be helpful when reviewing this content.

Standards

Data standards are the rules used to standardize how data is described, represented, and structured. They include common terminology (such as gender categories), definitions (e.g. what constitutes a disability), representation (for example, dates), and the process of making data recognizable through common file formats. Data should be findable, accessible, interoperable, and (re)usable.

Because agencies may want their internal data to be comparable to data from other sources, such as IRCC data, it is recommended that agencies consult governmental data standards, many of which are available through the Government Open Data portal and on the Statistics Canada website. Organizations in the same sector and/or province or region may also benefit from cross-agency collaboration in establishing shared data standards, which better enables data sharing and comparisons to generate a larger and more accurate picture of the sector as a whole.

WHAT'S COMMON?

Common file formats include .xls and .csv (both of which can be opened using spreadsheet programs like Excel). There are a wide variety of file formats out there! Don't get bogged down with the variety—consider who you share data with and what formats these partners can read.

In addition to government standards, agencies can consult with staff of diverse backgrounds as well as the communities they serve to learn what categories and labels accurately reflect that community's self-identification. In order to ensure data standards are used correctly, agencies should also maintain clear documentation with relevant definitions for staff. Agencies may consider creating similar resources for clients to increase transparency and accountability.

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POSSIBLE ACTIVITIES:

- Examine the standards currently in use to identify any areas where your data is not standardized.

- Compare existing agency standards to those of entities whose data the agency wants to be able to compare against, such as the Government of Canada or other organizations with whom the agency wants to collaborate.

- Consult with staff of diverse backgrounds and identities as well as client communities to better understand the labels and categories used in self-description.

- Connect current standards, collaborator standards, and self-identification to update data standards for the agency.

- Create a guide to agency data standards and hold trainings for staff who collect, enter, and use data.

Collection

Data collection is a pivotal part of the data lifecycle. Staff collecting data should be trained to understand what they are collecting and why; the nuances of informed consent; how the data will be used, who can see it, where and how long it will be kept; and in establishing culturally safe spaces. Federal and provincial legislation may affect what data can or should be collected. For example, in British Columbia, it is recommended that demographic data be collected, but refusal to answer demographic questions cannot disqualify clients from accessing services. Agencies should review any data-related legislation or guidelines in their respective province or relevant contracts to ensure that they are complying with regulations and stipulations.

An understanding of what data is being collected, and the purpose it serves, is necessary for staff to have and to be able to share with the client. Stronger understanding may improve client receptivity and increase response accuracy, as staff will be better able to explain the meaning of questions or categories which may be unclear to the client. Understanding how the data will be used, stored, and protected is also important information to share with the client, as all of these things are integral to informed consent.

Culturally safe data collection centres on a recognition not just of possible cultural differences, but also the power relationship between staff and clients and the potential for data collection to harm individuals or communities.[6] For many clients, staff are the gatekeepers of services. Newcomers may be afraid of stigma, losing access to needed supports, or even being sent back to a country from which they fled,[7] a concern that is particularly among refugees with disabilities.[8] Understand that the mere possession of sensitive information is a form of power. For example, some newcomers do not share their gender identity or sexual orientation with their co-ethnic communities, fearing a loss of support if this information were to be known.[9] A settlement worker with this data then has the ability to cause substantial harm to that client by sharing this information. It requires care and humility to create a space where clients feel safe sharing this kind of sensitive information.

THE RIGHT TO BE FORGOTTEN

Informed consent is essential to ethical data work. But people may change their minds about sharing their personal information, so you need a way for clients to retract their consent (also called "the right to be forgotten"). This is often a simple written form. Let clients know how this works at the same time as you ask for their consent. Remember to build in a method for removing identifying data so that you can honor these decisions.

POSSIBLE ACTIVITIES:

- Review federal and provincial regulations and contract stipulations related to data collection.

- Examine data collection practices within the agency, including who is collecting data, the environment in which data is collected, and how informed consent is navigated.

- Locate any gaps in institutional knowledge and staff training with respect to culturally safe and trauma-informed data collection.

- Establish guidelines and training on culturally safe and trauma-informed data collection.

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Quality

Data quality refers to the accuracy, completeness, and consistency of data. High-quality data increases trustworthiness and ensures that evidence-based decisions are made on a strong foundation of evidence. Agencies should establish a clear internal expectation for data quality, measured in percentages. In the initial evaluation, and at regular intervals, data quality should be assessed and protocols adjusted to support high quality data using the following measures.

Accuracy refers to the validity of data. For example, if a data field has an invalid value, it may have a word instead of a number, or it might contain an impossible answer, such as an age of 230. Not all unusual values are necessarily wrong, but it is important to determine the proportion of unusual values and to identify and correct the ones that are definitively wrong, if possible.

Completeness is a measure of how many data fields are filled or empty. Incomplete data impedes analysis, so it is important to know how complete your data is, and to understand how incomplete data may affect any analysis or derived data. Include this measure in your metadata.

Consistency means that all data is using the same standards. For example, all entries use the same options for gender, and each option is defined the same across entries. Inconsistencies reduce comparability and thereby complicate and impede analysis and derivation.

The Government of Canada recommends the VIMO standard, measuring Valid versus Invalid data, Missing and Outlier values. These can be measured using simple data analysis and visualizations, such as generating a scatter plot that would clearly display outlier data.

GRAPH IT OUT

Simple data visualizations (like scatter plots or bar graphs) can be generated through spreadsheet software like Excel. These can be a quick way to check for outlier data—you will see your unusual data point off by itself and can check to see if it is a valid outlier or if it is the result of an error.

POSSIBLE ACTIVITIES:

- Audit data quality throughout organization.
- Identify areas for improvement.
- Establish data quality targets.

Curation

Agencies must consider federal and provincial privacy and protection laws and regulations as applicable to their data practices. This is especially important for managing data privacy and related protections. Because such regulations may change over time, it is essential for agencies to incorporate a review of data and privacy laws into their ongoing monitoring and evaluation practices. The Office of the Privacy Commissioner of Canada maintains a website, https://priv.gc.ca, with an overview of privacy-related laws and guides, including links and resources for privacy laws and oversight in each province and territory. In addition, contracts with federal and provincial governments may include stipulations around data privacy and protections, such as a requirement to store data within Canada. Agencies should review all funding contracts for privacy and protection requirements or guidelines.

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Warehousing is an important step in the curation process. Evaluating this stage of the data lifecycle requires examining where and how data is stored, both digitally and physically, and for how long it is retained before being deleted or destroyed. As with privacy and protection, agencies should consult federal and provincial regulations as well as relevant contracts. In addition to privacy protections, this step includes determining who, inside or outside the agency, has access to data and in what ways. This encompasses entering, viewing, changing, deleting, and exporting data. It is recommended that access be controlled, and that all agency staff with data access receive training appropriate to their data-related roles, including expectations and procedures for protecting client privacy. As data entry is one point at which inaccuracies may enter, training and quality checks for data entry are recommended.

Database structures play a key role in both curation and analysis. Because GBA Plus integration requires access to disaggregated data, agency databases need to provide mechanisms for disaggregating the data they contain. To avoid manual collation, which is time-consuming and error-prone, it is recommended that agencies establish database reporting structures for the desired disaggregation and collation, allowing the appropriate staff to extract data in the desired combination and format.

WHAT MAKES DATA CLEAN?

Data cleaning is simply the process of correcting or removing data that is inaccurate, incorrectly formatted, incomplete, or corrupted. Cleaning is the next step after checking data quality.

Curation also includes cleaning and processing data for use. Agencies need to have an established method for handling missing and/or inaccurate data. This can be handled in several ways, but it is important to center data equity in determining protocols for managing missing and inaccurate data. Excluding a data record because it is missing one or more fields may perpetuate underrepresentation, while filling in a "best guess" to correct a field may contribute to erasure and propagate biases and assumptions. One option is to follow up with the client in question to verify the answer.

Metadata is an essential part of curation, as it makes data easier to find, interpret, trust, and use. Metadata provides information about the source of the data (such as how and when it was collected), what processing was done (such as how it was cleaned or how aggregate numbers were calculated), an assessment of the data's quality, and the data standards that were followed. This information provides context for analysis and plays a valuable role in protecting against misinterpretation. This is important to include when reporting on data. Check with your database vendor to see what options you have for automatically generating some of your metadata.

POSSIBLE ACTIVITIES:

- Review federal and provincial legislation and funding contracts for stipulations regarding privacy and protection.
- Assess current practices against legal and contractual requirements.
- Determine whether existing database structures support all of the agency's needs and the extent to which they enable disaggregation and GBA Plus analysis.
- Audit curation practices for handling missing, invalid, or inconsistent data. Re-examine these practices through a data equity lens.
- Audit metadata practices for their ability to support finding, interpreting, trusting, and using data.
- Establish clear guidelines and practices for each aspect of data curations.

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Analysis & Use

For data management to support equity and intersectional analysis, it needs to enable access to disaggregated data, which is pivotal to any equity-based analysis, as it is difficult to find and identify gaps without the ability to compare service use or outcomes across demographic groups. Agencies may want or need to perform many kinds of analysis in the course of their work, and it is essential to retain an intersectional equity-driven lens throughout all analysis. The Government of Canada guiding principles of data ethics include using data to benefit society as well as ensuring that information derived from the data is reported fairly and does no harm.[10]

How information is presented, even the words used to frame it, impacts how that information is received and interpreted. It is essential to center the people from whom data has been collected and to consider how framing and language choices empower or impede the people and communities being described. When partnering with other stakeholders, agencies need to bring these concerns to the collaboration. Equity should drive collaboration, from selecting partners to shaping the relationship and the work done together.

Much like the data itself, analysis does not exist in a vacuum. It is performed for a purpose and put to use, both of which should incorporate an intersectional lens.

- Is this data being used to identify and address equity gaps or to excuse them?
- How could analysis be interpreted or used by other parties to support or hinder equity-seeking groups?
- In what ways can agency data analysis empower newcomer communities?

Reports and analysis cannot be controlled after they have been released, so these questions need to be considered beforehand.

STRIVING OR THRIVING?

It's very easy to fall into the trap of presenting all of your data around deficits by focusing on what is lacking. But that creates a very skewed image of newcomers. Consider ways to share successes, triumphs, joys, and the many ways newcomers thrive and contribute to their communities.

Analysis and utilization of data is a process that benefits greatly from engagement with client communities. Qualitative data from interviews, focus groups, and open-ended surveys provide valuable context, reinforcing or challenging results derived from quantitative data. Quantitative data is an excellent tool for identifying gaps, while qualitative data from community engagement is often required to determine the specific causes and barriers behind these gaps. For example, it is not enough to note that trans women are underrepresented in language classes; it is necessary to follow through on that observation and engage directly with trans women clients to learn why there is lower uptake. Do trans women fear or face discrimination from instructors or fellow students? Do they tend to have more challenges related to basic needs like income, food, and housing that make attendance more difficult? Without direct engagement, efforts to address this service gap may be misdirected and unsuccessful.

POSSIBLE ACTIVITIES:

- Identify the frameworks used to guide data analysis conducted by the agency. Consider the role data equity and GBA Plus play, or could play, in these processes.
- Examine how the agency engages with newcomer communities around data and analysis
- Consider which entities the agency shares its analysis, and the format in which the analysis is presented. Investigate possible mechanisms and accessible formats for sharing analysis with equity-seeking communities.
- Explore ways to engage newcomer communities directly in order to understand how data use impacts them.

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Monitoring & Evaluation

Finally, agencies must consider existing evaluation and monitoring practices.

- Are there procedures already in place to assess data quality?

- To monitor data collection?

- To maintain compliance with legal and contractual privacy obligations?

- If there are procedures, how consistently are they followed, and at what intervals?

- What practices are in place to identify and correct bias at each stage of the data lifecycle?

This evaluation framework can be a valuable tool for agencies seeking to improve their data practices, but evaluation and monitoring must be ongoing. Data standards may evolve to more accurately represent client identities, or to more closely align with outside standards, such as those used by the Government of Canada. Data collection should be monitored to ensure that it is gathered in a respectful and appropriate manner. Data quality needs to be regularly assessed. Curation practices may require updating to comply with legal and contractual obligations, to respond to evolving technology, or to prepare for disaggregation on alternate axes. Analysis and data use need to be closely monitored to uphold data ethics and agency values. At every stage, these processes need to remain grounded in data equity principles and be structured to facilitate intersectional analysis.

IF YOU LIKE IT, KEEP IT

This guide is intended to be reasonably comprehensive, but its component parts can be pulled apart and adapted in whatever way works for you. Maybe you want to have a yearly staff engagement event where you revisit your data questions and narratives, or evaluate one core practice every six months. If it works for you, do it!

POSSIBLE ACTIVITIES:

- Examine any existing monitoring and evaluation procedures for suitability, thoroughness, and usefulness. Consider where they are meeting agency needs as well as where gaps might arise.

- Consider streamlining relevant portions of this evaluation guide to fit agency needs and capacity as a regular activity.

Data Practices Evaluation Worksheets

The worksheets in this section are designed to provide guiding questions and possible activities for organizations as they evaluate their core data practices (as described in Phase Two and elaborated upon in Appendix A. Resources and capacity may limit the extent of an evaluation, so use as many or as few of these worksheets as makes sense for your data journey. Keep Worksheet 3 prominent and visible throughout this process, to sustain your reflection on equity and values across data practices.

Worksheet A1: Evaluating Data Standards

Data Standards Questions:	Notes:
Data Standards Questions:	
• What terms, categories, and variables are in use? (e.g. gender identities, ethnocultural identifiers, etc.)	
• Are all client identities represented in these standards?	
• What mechanisms are in place to update terms?	
• How are data standards communicated to staff?	
• How consistently are these standards used and upheld?	
• How are these standards expressed in the metadata?	
Possible activities:	
• Refer to data standards used by federal and provincial governments	
• Consider consultation with ethnocultural groups to determine terms.	
• Avoid using "other" as a catch-all category.	
• Provide clear documentation for all data standards in plain language.	

Worksheet A2: Evaluating Data Collection

Data Collection Questions:	Notes:

Data Collection Questions:

- Who is collecting data?
- Does the staff composition reflect the diversity of the population served?
- What are your data collection guidelines?
- How do they reflect agency values and data needs?
- What training do staff have? What training is the agency currently offering?
- What data is being collected? From whom?
- What are possible harms from this collection?
- How are those harms mitigated?

Possible activities:

- Consider updating data collection guidelines or practices to reflect emerging priorities.
- Consider offering additional training in data collection and cultural safety.
- Ensure all data being collected is minimally invasive and necessary for answering priority questions.
- Consider consulting with clients and communities about possible harms and concerns.

Notes:

Worksheet A3: Evaluating Data Quality

Data Quality Questions:	Notes:
• What is the expected standard of data quality? • How is accuracy checked? • How accurate is the current data? • How is data completeness checked? • How complete is the current data? • How is data consistency checked? • How consistent is the current data? • How is missing or inaccurate data handled? **Possible activities:** • Determine what standard of data quality is desired and what is acceptable. • Develop a standard quality check procedure/audit process and institute a regular schedule. • Develop agency guidelines for handling missing and/or invalid data.	

Worksheet A4: Evaluating Data Curation

Data Curation Questions:

- What legislation or contract stipulations exist concerning data storage and privacy? Where is data stored? What protections are in place?

- Who can access, change, and pull data?

- How is anonymization handled?

- Can data be disaggregated to the degree necessary to answer priority questions? How can future disaggregation be introduced?

- How, with whom, and for what purposes is agency data shared? What processes are in place to produce shareable data?

Possible activities:

- Refer to data storage and protection guidelines outlined in federal and provincial legislation and funder contracts.

- Implement a regular check to ensure protections meet standards and are up to date.

- Develop practices to ensure adequate disaggregation and a procedure for implementing new disaggregation protocols as necessary.

- Determine with whom the agency needs or wants to share data.

- Establish guidelines to ensure data can be exported in formats usable by data partners.

Notes:

Data Practices Evaluation Worksheets

Worksheet A5: Evaluating Data Use

Data Use Questions:

- What methods are used to analyze data?

- How is qualitative data integrated into data analysis?

- What processes are in place to ensure data is reported fairly and used responsibly?

- How is data currently integrated into agency decision-making?

- What partnerships are in place, and what role does data play in them?

- How are client communities connected to the ways agency data is used?

Possible activities:

- Establish guidelines for contextualizing data and using qualitative data (e.g. focus groups, open-ended surveys) to check agency data against client experiences.

- Integrate data equity oversight into reporting.

- Consider agency decision-making models in the context of data equity.

- Embed GBA Plus and data equity principles in partnerships and collaborations.

- Consider community outreach and engagement practices.

Notes:

Data Practices Evaluation Worksheets

Worksheet A6: Evaluating Data Monitoring

Data Monitoring Questions:

- What processes are in place to monitor data quality? What processes are in place to assess practices for potential harms?

- How is the agency accountable to its clients and funders?

- How diverse is the team responsible for data throughout its lifecycle? What measures are in place to ensure diverse perspectives?

- How often are data security measures evaluated? In what ways is quantitative data checked against qualitative data?

- What resources are available to staff for ongoing skills development?

Possible activities:

- Update or implement processes and schedule for regular data quality monitoring and updating data security measures.

- Update or implement standard practices for community consultation.

- Integrate accountability standards and measures into monitoring and evaluation framework.

- Consider regular qualitative data collection and comparison between qualitative and quantitative data for gaps and incongruencies.

- Consider developing, or partnering to create, resources and training for staff involved in the data lifecycle.

Notes:

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Endnotes

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