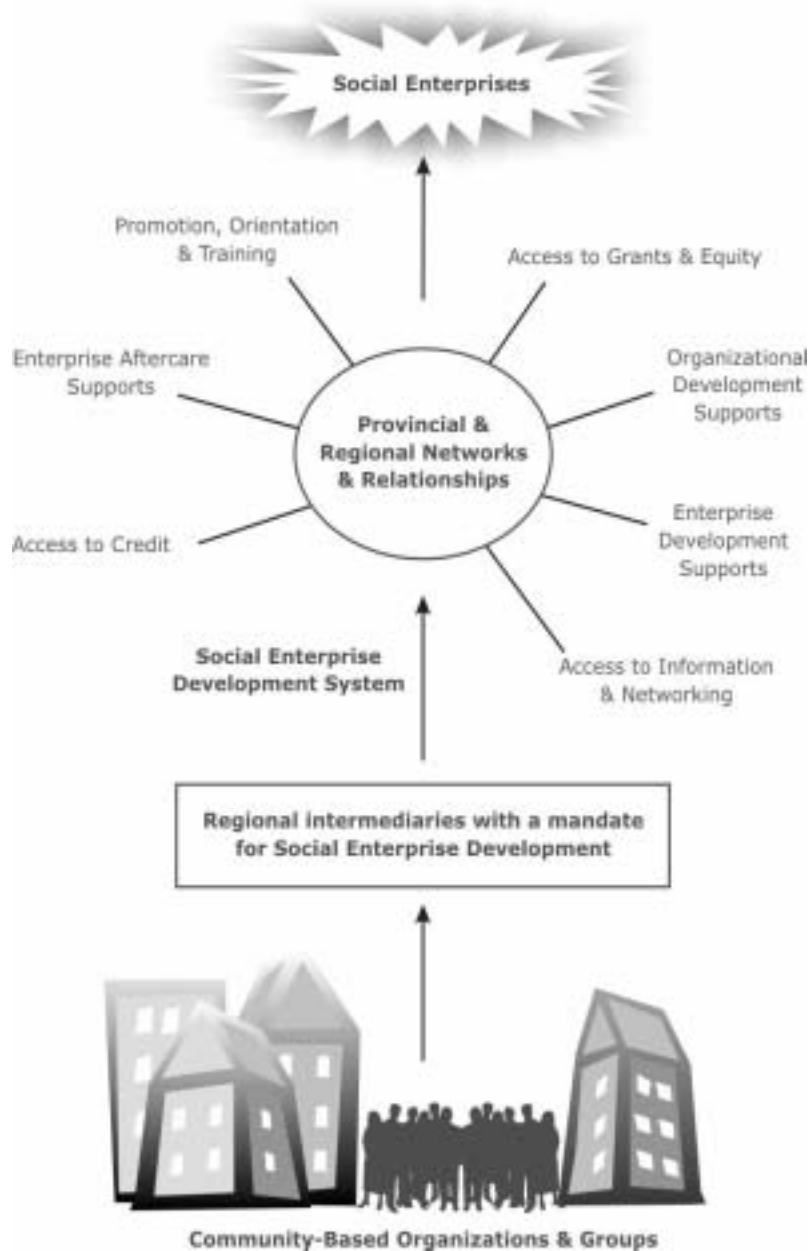


Evaluation Report Framework Outline

Building Capacity for Social Enterprise Development



**Canadian Centre for Community Renewal and the
Centre for Community Enterprise**

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1.0 The Model

The underlying goal of this model application is to strengthen the skills and relationships required to support a social enterprise development system (as depicted on the cover). In BC, this is being done in two regions. In francophone Ontario there are three regions covering the entire province but focused on a particular population, the francophone communities. So, one province is geographically focused and the other is population focused. In both cases, there are provincial steering groups (PSGs) whose mandate is to learn from the regional work, examine implications for their own work, to connect regions with resources, and to be collaborators on achieving the goal.

There are a number of tools and methods being used as the basis for this learning and strengthening of the system:

- The SE Checklist is at the heart of this model. Regions are trained to use it with community organizations and groups

2.0 The Evaluation Framework and Approach

This report describes activities, outcomes and impacts of the first nine months of the project. The project includes two sites in BC and three sites in francophone Ontario. Each province brings a very different context to this work, so results are reported separately and then integrated where that is appropriate. In addition, there are several levels of reporting related to the primary goal of building capacity for social enterprise development:

- The structuring level: what we are learning about partnerships, participation, funding, training trainers and other tasks related to the initial organizing and structuring of a project of this scope and complexity.
- The implementation level: what we are learning and what impacts have been measured related to the following:
 - Provincial level organizations awareness, commitment and capacity
 - Regional level organizations awareness, commitment and capacity
 - Community Based organizations and groups awareness, readiness and SE development capacity

The project is designed to gather baseline data for the provincial and regional partners (year end 2005) and then measure changes and impacts at the end of 2006 and again at the end of 2007. Baseline data for the Community Based organizations and groups who participate is gathered at "intake" – which is when they attend the initial one-day workshop delivered by regional organizations. Intake and data collection at this level then is continuous, with follow-up measures of impacts (for whatever period they have been engaged) at the end of 2006 and again at the end of 2007.

This report then, will speak to our learning from the structuring process, and will note where very early impacts have been achieved during implementation, but for the most part it presents what we call "baseline" information about the organizations involved. This means it offers us a starting "snapshot" of the current capacities and conditions related to Social

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Enterprise Development. Subsequent reports will be able to speak to the question of change over time, and the impact of the project more tangibly.

2.1 Use of Control Site

The proposal for the project described the use of a control region – where the project was not being implemented – to help us understand the impacts of the project. To date however, workshops in Ontario and in the urban adjacent site in BC have all attracted participants from outside project regions (both urban and rural). All material is free on our website, and is being accessed by other organizations across the country. It is simply not realistic to find a region where there is no potential impact from the project. While this bodes well for our goal of scaling up what works, it is a problem from a research reliability perspective.

In lieu of this control approach, we have opted to use a case study approach. We will take research and case studies from the UK, US and anything available in a Canadian context and summarize findings around core indicators. This information will be used to compare to the project findings and impacts. At this time we are not sure how much information is available given the relative newness of the field. It may be though that by the end of 2007, we can access the findings of the SHRCC SE Research Hubs related to mapping etc. in both provinces.

3.0 Implementation of the Model to Date (Overview)

List the main types of activities related to Structuring and Implementation.

4.0 Alberta, BC and Ontario: Early Observations of SE Readiness

5.0 Structuring the Project: Impacts and Lessons to Date

- 5.1 Provincial and Regional Site Selection**
- 5.2 Provincial Steering Groups (PSGs): Collaboration**
- 5.3 Regional Organizations: Participation & Ownership**
- 5.4 Funding**
- 5.5 Workshops and Materials: Stimulate Awareness & Engagement**
- 5.6 Research Tools and Methods: Observations To Date**
- 5.7 Communications: Impacts Outside Project Areas**

6.0 Project Implementation: Impacts and Lessons to Date

Introduction to this section: describe the workshop delivery methods and objectives and PSG engagement to date.

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6.1 Provincial and Regional Awareness and Commitment Baseline

6.2 Provincial and Regional Capacity Baseline

To include indicators related to partnerships, participation & capacity (for promotion, service delivery, access to resources, policy influence)

6.3 Community Based Organizations: Who are they?

6.4 Community Based Organizations: Awareness and Readiness

6.5 Community Based Organizations: Priority Tasks

7.0 Success Stories To Date

8.0 Conclusion

ATTACHMENT #1: LIST OF REPORTS AND RELATED DOCUMENTS AVAILABLE

For each Evaluation Report we will attach a list of baseline and other evaluation reports that are available as well as a list of manuals, guides etc. that have been produced by the project. This information will all be available from our website under the Social Enterprise page, or by contacting Michelle at: colussi@shaw.ca or (250) 595-8874.

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ATTACHMENT #2: DETAIL OF OUTCOMES AND RELATED INDICATORS

Project Structuring Activities

The research framework originally focused on tracking impacts of the project on provincial, regional and community level organizations who were participating. As a result of our experience with the initial organizing – or getting ready to deliver the project – we have identified a number of additional themes that we are tracking for impacts and lessons as well. These are described in the table that follows.

Project Structuring Activities		
Anticipated Outcomes	Indicators	Data Collection Methods
PSGs will be collaborators in building a stronger delivery system for SE	<ul style="list-style-type: none"> • # of (non-meeting) interactions between provincial and regional members • % of members who attend workshops (or send staff) • % of members who request workshops for their org or others • # of members who insert material or delivery ideas • # of members who start to collect data for the research component 	Co-ordinators to track ongoing
Regional Sites will take ownership of the service delivery	<ul style="list-style-type: none"> • # of workshops delivered • scope of sectors & communities engaged • # of new products or adaptations developed • # of requests for specific TA support • # of other providers who become familiar with checklist/use it • funders & decision-makers engaged • Effort to leverage TA funds 	Co-ordinators to track & formally interview annually
Funding will be obtained	<ul style="list-style-type: none"> • Project is fully funded • Additional TA dollars are leveraged 	Co-ordinators to track
Workshop materials (including the checklist) and delivery will engage trainers and community orgs in thinking critically about the role of SED in their community	<ul style="list-style-type: none"> • Trainers do their homework & take the learning seriously • Workshop evaluations • SE is a tool that advances their org. mission & goals • Trainers ID value of material & TA supports 	Co-ordinators to track Interviews with Regional trainers & champions annually
Workshops will increase profile and regional relationships for Reg. Orgs.	<ul style="list-style-type: none"> • Reg orgs have an increased DB of community contacts • Reg orgs get more requests from community groups • # of media stories over project 	Through interviews with Reg. Org staff/trainers

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	<ul style="list-style-type: none"> # of requests from non-project consultants & orgs to participate in training/region 	
The information collected through the research component will inform our understanding of issues & opportunities	<ul style="list-style-type: none"> PSG and National Advisory input Extent to which # of initiatives to which members attribute project participation or information as a contributing factor types of initiatives 	PSG input
Communications activities will increase awareness and understanding of SE	<ul style="list-style-type: none"> # of requests for newsletter from non-project orgs & individuals # of downloads of materials anecdotal feedback on materials # of requests for workshops in non-project areas 	Co-ordinators & publications staff to track

Project Implementation: Provincial & Regional Level Organizations

These levels of project impact are currently being assessed through a survey of regional and provincial level organizations involved with the project Provincial Steering Groups. In addition to initial interviews data has been checked and additional data collected from organizations where there were gaps or questions about reliability.

- Baseline data was gathered for 2005, and subsequent collection points (which will give us measures of change or impacts) are the end of 2006 and 2007.
- We anticipate the use of focus groups and case study analysis to supplement this data for the second round at the end of 2006.
- Provincial Coordinators are tracking their work in training and TA for the regional organizations (site level) as a supplement to this key respondent information.
- For all indicators, an ongoing focus of data collection will be a supplemental question: "*To what extent did this project impact what has changed – and how?*"

Provincial & Regional Level Organizations		
Outcomes:	Indicators:	Data collection:
Increased Awareness of Social Enterprise	<ul style="list-style-type: none"> Level of board awareness Level of staff awareness Level of member awareness (if applicable) 	Baseline: Dec. 2005 1 st Impact Assessment: Dec. 2006
Increased Commitment to Social Enterprise (SE)	<ul style="list-style-type: none"> Level of commitment of board Level of commitment of staff Level of commitment of members (if applicable) Extent organization is active in SE development Extent that SE is relevant to achieving org. mission Existence of a strategy to focus resources and effort on SED 	2 nd Impact Assessment: Dec. 2007

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<p>Increased Capacity for SED:</p> <ul style="list-style-type: none"> - Direct Service Delivery - Referrals for Services - Screening - Awareness & use of resources - Extent and nature of relationships 	<ul style="list-style-type: none"> • Extent to which organization actively promotes SE • # of new SEs worked with in last year • # of expanded SEs worked with in last year • # of training sessions on SE in last year • # of participants in training sessions in last year • # of SE clients for organizational dev. TA in last year • # of SE clients for business dev. TA in last year • # of SE clients for after-care TA in last year • # of SE clients referred for TA in last year • # of SE clients referred for loans/grants in last year • # of SE loans/grants made in last year • Existence of a screening tool to assess readiness • Effectiveness of screening tool • Level of awareness of resources for SE • Level of availability and accessibility of TA services • Level of availability and accessibility of credit • Level of business / non-profit partnerships for SE • Extent to which organization is involved in influencing the policy context • Nature and significance of local, provincial and federal level relationships 	<p>Data collected using: Key Informant interviews, relationship mapping, statistical reports & focus groups</p>
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Project Implementation: Community Based Groups and Organizations

The project impacts on these organizations are measured through three survey tools.

- The first, asks all full day workshop registrants a number of questions in the on-line workshop registration form.
- Second, all workshop participants complete a workshop evaluation.
- Third, those who think they are ready to move ahead with SE Development then complete another survey at the end of the workshop: Next Steps Questionnaire. The information in this tool is used by CCE and the Regional Organization to identify key tasks – and thus technical assistance needs – of CBO's in each region. This second tool will also form the basis of our second round of data collection where we will ask about progress against tasks.
- We anticipate that roughly 25% of all CBOs at this second level will also have follow-up phone interviews to probe for additional details and check validity of data.
- For all indicators, an ongoing focus of data collection will be a supplemental question: *"To what extent did this project impact what has changed – and how?"*

Community Based Groups and Organizations		
Outcomes:	Indicator:	Data collection:
We understand the reach of the project in terms of types, mandates and goals of organizations engaging in SE Development.	<ul style="list-style-type: none"> • Legal structure of org. • Revenue sources of org. • Sectors of focus • Populations of focus • Purpose for SED • Current SE focus/results 	Collected during workshop registration: Feb 15 in Ontario & ongoing March 21 in BC & ongoing
Increased awareness of SE	<ul style="list-style-type: none"> • Prior awareness of Reg. 	Collected in workshop

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<p>& Resources</p>	<p>Org.</p> <ul style="list-style-type: none"> • Level of interest in SE pre-workshop • Level of interest in SE post workshop • Understanding of SE post workshop • Usefulness of workshop activities & resources • Use of resources post workshop • Additional resources required • Appropriate use of Reg. Org. post workshop 	<p>evaluation: Ongoing</p>
<p>Assessment of Readiness</p>	<ul style="list-style-type: none"> • ID of readiness for SED • Why or why not • Impact of workshop on decision 	<p>Collected post workshop</p>
<p>Identification of Tasks toward SE Development</p>	<ul style="list-style-type: none"> • All tasks over next year • Priority tasks • ID of tasks that require outside assistance • Types of tasks that require assistance • ID of who can provide that assistance 	<p>Collected post workshop and annually over two years</p>

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<p>Completion of Tasks:</p> <p>Organizational Development</p> <p>Enterprise Development</p> <p>Community Participation and Strategic Networking</p> <p>Use of Technical Assistance</p>	<ul style="list-style-type: none"> • Which tasks (from 1st questionnaire) were completed • Which tasks were not • Use of tool • Problems that prevented task completion • Nature of tasks requiring assistance • Use & impact of Reg. Org. • Access to other TA providers • Access to grants • Access to financing • Scope of relationships & networks compared to baseline • Degree of impact of project/tool on above • Overall impact on organization 	<p>Collected in 2nd and 3rd data collection periods (Dec. 2006 and 2007)</p>
<p>SE Formation</p>	<ul style="list-style-type: none"> • Average length of development time • Average cost of development • SE type and focus • SE jobs • SE revenue 	<p>?? Will we have time to get any of this data? This tool is not yet developed.</p>