

**The DEVELOPMENT WHEEL**

**BUILDING CAPACITY FOR SOCIAL ENTERPRISE  
DEVELOPMENT**

**EVALUATION REPORT: JUNE 2007**

**CANADIAN CENTRE FOR COMMUNITY RENEWAL  
Centre for Community Enterprise**

Mike Lewis, Michelle Colussi and Ethel Cote

## **Table of Contents:**

I Summary of Key Points	page 2
II Background & Context for the Report	page 6
III Data and Outcome Analysis To Date	page 8
A. Reporting on British Columbia	page 8
Conclusions for BC	page 27
B. Reporting for Ontario	page 29
Conclusions for Ontario	page 47
IV Attachments for Ontario	page 49

## **Stories and Testimonies**

John Howard Society – Making the Links	24
A Project In Development : Social Enterprise Retail Cluster in the Okanogan	27
Ontario Development Officers Perspective on the Use of and Adaptation of the Development Wheel (en Français)	49

## I Summary of Key Points : Ontario and B.C.

<b>ONTARIO SUMMARY OF KEY POINTS</b>	<b>B.C. SUMMARY OF KEY POINTS</b>
<p><b>Summary of Key Impacts to date:</b></p> <ol style="list-style-type: none"> <li>1. The project has had a significant impact on the 12 organizations and associations that make up the provincial steering group in Ontario. On every indicator it is clear that the level of awareness (board and staff), activity levels and integration of SE as a strategy into organization life has increased substantially in the last year.</li> <li>2. While there was some evidence that relationships between key actors was evolving before the introduction of the DW project, it is clear that the DW project has accelerated this process. The bi-lateral collaboration evident, the integration of SED into the RDEE mandate, the growing collaboration between CCO and RDEE, and the use of the DW by Trillium to design a funding decision making tool, are all indicators that progress towards weaving together a stronger SE development system is underway. The DW project has created both the space (the PSG table) and the supports to enable organizations to think, to network and for some of them, to plan together in SED.</li> <li>3. RDEE (East, CSO &amp; North) &amp; CCO organizations have benefited most directly from the project in terms of additional capacity. They have enhanced their training and project development capacity in the social enterprise field and increased their visibility, particularly RDEE. Both organizations have adapted the design and applications of the tool to address varied contexts and opportunities. It appears that the prospects are good for the DW to be integrated into the mandates and services of each organization.</li> <li>4. Trillium Foundation's adaptation of the tool as a screen for grant decision making is beginning to shape their relationship with organizations making funding requests. Demand is slowly becoming sensitive to the questions and demands emanating from the DW framework.</li> <li>5. There is an increase in demand for TA services as a result of the project.</li> <li>6. The workshop is a successful means of introducing SE and helping CBO's assess their readiness.</li> </ol>	<p><b>Summary of Key Impacts to date:</b></p> <ol style="list-style-type: none"> <li>1. The DW project has created both the space (the PSG table) and the supports to enable organizations to think and plan together. More than that, the cycle of applied research being fed into discussions is enabling ongoing progress to be made at both the development system level and, to a lesser extent, at the organizational level.</li> <li>2. ENP and FVCSE organizations have benefited most directly from the project. They have built additional capacity that has allowed them to "do more with less" as well as adapt their service delivery methods to better serve CBO's and communities. ENP has been able to expand its reach in rural communities more rapidly and broadly as a result of the project.</li> <li>3. The workshop is an efficient and effective means of introducing SE and helping CBO's assess their readiness.</li> <li>4. The engagement of the Nanaimo CFDC (by ENP) in downstream TA after the workshop is one example of successful engagement of regional organizations. This CFDC has also joined the CFDC discussion group subsequent to participating in the workshop.</li> <li>5. While we still have questions related to the capacity and TA requirements of CBO's starting a SE, we understand much more than one year ago and have focused future activities to help us answer outstanding questions.</li> </ol>

<p>Workshop materials are highly valued and are used as an ongoing resource after the workshop.</p> <p>7. Services organizations (employment, social and recreational services), arts and culture organizations and tourism have been the main sectors drawn to the workshops and a majority are at an early stage of exploration.</p>	
<p><b>Summary of Key Lessons to date: Ont.</b></p> <p>8. The process of planning, applying, assessing, learning, training, re-training, informing, re-informing, sending materials, re-sending materials, re-planning, applying again, etc. was not fully anticipated in the research design and thus we have no indicators that speak this process and its related impacts, positive and negative.</p> <p>9. The time spent in training &amp; informing regional trainers (12 for RDEE + 1 for CCO – who trained her colleague plus 3 regional RDEE directors) for the workshop was not warranted and took a lot more time than planned.</p> <p>10. Between training and having the capacity to appropriate the content and be able to deliver it, more time than anticipated was required. This may explain the time needed by RDEE to assess who could and could not deliver and also their readiness (or not) to provide efficient TA.</p> <p>11. CBO's do not establish SE's quickly. The gestation period is long.</p> <p>12. This project reveals the importance of having effective resources for SED in French for francophones in a minority context. The request for a lot more resources (additional information on Ontario SE, list of funders &amp; potential funders, meetings with funders, specific resources for each an everyone major task of organizational &amp; business development &amp; community mobilization had been confirmed by almost all workshops participants.</p> <p>13. SED is emerging as an important strategy within community development, and may have a particular relevance for particular segments of the community (Seniors, women, immigrants, youth).</p>	<p><b>Summary of Key Lessons to date: B.C.</b></p> <p>6. This process of planning, applying, assessing, learning, re-planning, applying again, etc. was not fully anticipated in the research design and thus we have no indicators that speak to the huge amounts of time and energy it takes, or to measuring the types of organizational and system level impacts.</p> <p>7. Related to this, we assumed that project impacts would be more targeted at the quantity of organizational service delivery when in fact there have been more impacts on the quality of services and on the integration and coordination of system actors than on individual organizations.</p> <p>8. The time spent in training regional trainers for the workshop was not warranted. Demand is such that centralized delivery is more time and cost effective. Early interest in CFDCs to play a more active role is encouraging.</p> <p>9. It will take far more time than we anticipated to generate the volume of social enterprise activity estimated in the original proposal.</p> <p>10. The tool itself is very useful as part of the workshop curriculum but the framework of steps and types of tasks it presents has not been picked up in other ways, at least in B.C., or even applied post workshop as far as we know. Ontario results contrast with this starkly. There will likely be more discussion of this after the CBO follow-ups are completed.</p> <p>The major impacts to date have come primarily as a result of the leadership/support CCCR staff has been able to provide and the process of learning from the applied research itself.</p>

<b>Outstanding Questions: Ont.</b>	<b>Outstanding Questions: B.C.</b>
<p>14. Within RDEE, the evidence of “ownership” would appear to vary between the three regions. This is reflected in the number of workshops completed, the partnerships forged from promotion and the level of level of adaptation and integration of the tool into the overall programming of the organization. It remains a question as to why this variation. To what extent is it the attitude and experience of management and key development staff that explains the varied performance among regional intermediaries?</p> <p>15. To what extent is there variation in the results being achieved between RDEE and CCO? This may or may not be a fruitful question. It is raised because of the different starting points of each organization; CCO is dedicated to one format or SE development whereas for RDEE, it is but one sphere in a larger array of services it provides. How to determine clues to answering this question has not been thought through.</p> <p>16. Has the change in Federal Policy on the social economy affected RDEE delivery and if so, in what ways?</p> <p>17. Why have the workshop materials and related tools been used much more extensively in francophone Ontario than they have in British Columbia?</p> <p>18. What are the other factors that foster CBO success in SE development and how can we better assess readiness and/or focus our limited resources where there might be greater impacts?</p>	<p>11. Given the collaborative effort of multiple players in BC, some of which are outside this project, it is very difficult to definitively assess impacts. How do you pull out one role, or one activity, when in reality it is a series of roles and activities (and sometimes good timing or luck) that have contributed to a shift, or a new opportunity being realized?</p> <p>12. What are the other factors that contribute to CBO success with SE development and how can we better assess readiness and/or focus our limited resources where there might be greater impacts?</p> <p>13. With regard to scaling up of the tool, do we need to follow-up with those who have downloaded the workbook from the website, or otherwise do more to identify the potential of the tool after the project? What else do we need to know in order to decide how important the tool is to SE assessment and development?</p> <p>14. What would the impact be in CCCR if its capacity building role worked more directly with regional intermediaries to assess the opportunities for social enterprise development in key sectors, for example, in the health, arts and culture, alternative agriculture? Might this analytical work lead to targeting promotion of the workshop more effectively? In sectors “ripe” for social enterprise, might impacts be deepened and accelerated?</p>

In both provinces, there is evidence that the project has played a critical convening and capacity building role for PSG members. Both PSG’s however have taken hold, or benefited from the project, in different ways.

In Ontario, the project has contributed to a number of specific relationships and partnerships being developed among participants and there has been a much greater impact on overall awareness and capacity related to SE at every level.

In contrast, the BC PSG has met more often and both stimulated and been fed research (and other) reports to guide the collective learning process. This has yielded a number of project innovations and insights into the development system overall.

In both provinces the regional organizations have had increases in capacity among staff, and they attribute specific benefits to the project (the curriculum, the training, the coaching, the materials). However, in Ontario this seems to be a more dramatic impact. Both provinces also have one additional PSG member directly involved in delivery (CCO in Ontario & ENP in BC). There have been direct project impacts on the resources and/or capacity of these organizations as well.

In Ontario, there seem to be far greater impacts on the capacity of regional organizations than in BC. The reasons are not immediately apparent although the workbook is also one of only a few resources in French available to them, whereas in B.C. there has been longer term access to a range of materials.

In BC, the impacts have been primarily at the systems level. The project in BC is actually contributing to changing the face of how SE services are delivered provincially, more than the quality of SE services available in the regional site (which is already quite high).

# I. Background and Context for this Report

## A. Reminder of the Project Goals

The original pilot project was intended to increase our understanding of the ways in which *adaptation and scaling up of the use of a tool called the Development Wheel*. (DW) could be effectively facilitated. It was designed<sup>1</sup> to build on existing assets relevant to rural community economic development and *to increase regional and provincial capacity relevant to social enterprise development*. The proposal suggested<sup>2</sup> that the application of the tool, *set within a strategy of relationship building, networking & capacity building*, could be a *means for strengthening the social economy in BC and Francophone Ontario* and a *means by which social enterprise development could be rendered more effective and more efficient*.

There are some important social economy policy developments on the Federal scene that are shaping the context within which project goals are being pursued. Before reporting the activities, impacts, challenges and successes of the last year, it is useful to take note of some features of this broader environment that may be relevant to project achievements.

## B. Federal Social Economy Policy has Changed since Project Inception

The Development Wheel project was conceived at a time when social economy policy momentum at the Federal level was high (December 2004). The choice of the Development Wheel by CCE as the tool for the Models Program was specifically motivated by the knowledge that new Federal resources were coming available. By the time the project got underway (September 2005) negotiations with Treasury Board were complete in Quebec and underway in several other regions, including B.C. and Ontario. The budget of \$132 million was for social economy capacity building and financing development initiatives. While modest, it was viewed by actors in the field as a point of departure from which some real advances could be made. In B.C. and Ontario active discussions were well underway. The modest recognition of the importance of the social economy in the life of Canadian communities was creating a veritable buzz of activity and interest.

Many of the players involved in the two provincial steering groups in B.C. and Ontario were very encouraged by these events. Some long time actors were actively organizing to expand the capacity and organization of the sector to respond to new opportunities and challenges. Others, newer to the values, goals and tools employed within the social economy, began for the first time to really position their organizations to learn and become contributors.

The election of a Conservative government in the late fall of 2005 led to several setbacks; all Social Economy funding was frozen that did not have treasury board authority already in place. Several months later the uncommitted portion of the \$132 million was cut, along with another billion dollars plus from the non-profit sector.

It appears more changes are on their way. Community Futures Development Corporation managers have reported that though social enterprise has not been formally removed from their mandate,<sup>3</sup> they recently have been told in B.C. by Western Economic Diversification that they are to redirect their efforts to larger, "regionally significant" projects and to remove any relationship they may have to work that might be construed as being related to social development.

---

<sup>1</sup> Proposal page 10

<sup>2</sup> Proposal pages 1 and 2, and 5 and 6 for the importance of building networks and relationships

<sup>3</sup> The Martin government inserted social enterprise into the CFDC mandate as part of their social economy policy

### **C. Impacts and Questions for the Project Arising From the Federal Withdrawal**

These broader policy factors are introduced in this report as background to some analytical threads and questions. Did the Federal policy context have discernible impacts? If so, what were they? We know there were some obvious problems that emerged in B.C. WED withdrew from any engagement in this project. The withdrawal of Trail as a regional site was directly related to being denied resources from WED. The Nadina CFDC erosion of staff capacity for the project was indirectly related to the sudden loss of WED interest, flexibility and innovation. New rules and frozen resources shut them down. Thus in B.C. we lost two regional intermediaries and were forced to cancel T.A. grant funding in this province. Nadina was forced to withdraw from the project in September 06.

These are just the obvious impacts. Others may be more subtle. For example, what tensions are introduced for those project participants that have a high level of dependence on Federal funding? Is there discernible impact on project dynamics? If so, is there an impact on the extent to which scaling up objectives are being realized, or not? In contrast, has there been any positive project impacts resulting from the Federal about face? These will be explored at appropriate junctures in the report that follows.

### **D. Key Project Accomplishments Reported to end of May 2006**

For the ease of the reader, we summarize here the highlights of the first nine months of activity:

1. Workshop and related materials were designed, written, translated, tested, revised and tested again.
2. Workshops were field tested in B.C. and Ontario and training regional trainers was initiated. Six workshops involved 159 participants: 60 in Ontario and 99 in B.C.
3. Provincial Steering Groups were finalized, organized and convened for a two day meeting in the fall of 2005 and with conference calls thereafter.
4. Research designs related to provincial and regional intermediaries were done and baseline research completed and published.
5. Design of Next Steps Questionnaire was designed and tested (twice) with revisions still ongoing. Baseline had not been achieved.
6. Data base design was initiated
7. Project Newsletter was launched
8. Further funding secured from FedNor and Trillium in Ontario. WED funding attempts failed
9. Alberta component was vigorously pursued but taken off the table as a viable project within the time frame established

By May 2006 project implementation was two months behind schedule, due in part to the need to broaden the number of regional intermediary staff participating in the project. Targeting and marketing the two workshops took more time and coaching than expected. As a result training regional intermediary trainers to deliver workshops was somewhat delayed. Because of these delays, the number of workshops, able to be delivered before the summer, was reduced. As a result, the training of staff in four of the five sites was not as advanced. The anticipated completion of this aspect of the regional intermediary capacity building in December 2006 was thus delayed into early spring 2007. The overall delay given this timing reflects a 4 to 5 month detour from the original timetable.

## **II. Data and Outcome Analysis to Date**

The following two sections reporting on the research in B.C. and Ontario represent a significant point of departure from the format of the first report (May 2006) submitted to the Rural Secretariat. Using the original outcomes and indicators from the Development Wheel evaluation framework, we present, by province, the data gathered to date by outcome. At the end of each section we present a summary of the impacts, lessons and outstanding questions that emerge from our analysis of the projects progress in the two provinces.

1. Outcomes are organized by the Project Element they are related to: Structuring the project, Provincial/Regional Organization impacts, and Community Based Organization impacts. The original definition of outcome and related indicators is presented, as well as the results for the last year. Where indicators have no data and/or have not been useful, this is noted by coloring the indicator red.
2. Additional data is presented that relates to the outcome from reports, minutes, etc.
3. Following is an interpretation of the data is provided
4. Finally the limitations of each outcomes data set is noted, if relevant.
5. The same is then done for Ontario.

### **A. Reporting on British Columbia**

The research framework originally focused on tracking impacts of the project on provincial, regional and community level organizations who became participants. These continue to be tracked, although as indicated, there are ongoing adjustments and revisions, both to indicators and to methodologies employed. In BC, there are additional objectives related to the re-profiling of the project that took place in November and December 06. These follow at the end of this section.

#### **a) BC Provincial Steering Group (PSG)**

- Enterprising Non-Profits (ENP) – training & grants for SE development
- BC Coop Association (BCCA) – training, orientation, coop development & referrals
- United Community Services Co-op (USCS) – an umbrella for 100+ non-profits across BC; provides training, organizational & enterprise development services, HR & financial management as well as group buying etc.
- Vancity Capital Corporation, a subsidiary of Vancity Savings Credit Union that provides higher risk enterprise financing
- Fraser Valley Centre for Social Enterprise (FVCSE) – **regional site** (supported by South Fraser CFDC)
- Two representatives from the Rural Secretariat (RS)
- Coast Capital and Société de développement économique de la Colombie-Britannique (SDECB) remain on the mail list but no longer participate actively. They were not included in the Provincial & Regional Report BC 2006.

#### **b) Project Structuring: Outcomes 1- 7**

<b>1. Structuring Outcome: PSGs will be collaborators in building a stronger delivery system for Social Enterprise (SE)</b>	
<b>Indicators</b>	<b>Results for 06/07</b>
<ul style="list-style-type: none"> <li>• # of (non-meeting) interactions between provincial and regional members</li> </ul>	<ul style="list-style-type: none"> <li>• Over 15 formal, non-PSG meeting interactions involving both PSG members and others (TA Providers, etc.) who have worked closely with CCCR in the research program and the design of activities related to re-structuring the project.</li> </ul>

<ul style="list-style-type: none"> <li>• % of members who attend workshops (or send staff)</li> <li>• % of members who request workshops for their org or others</li> <li>• # of members who insert material or delivery ideas</li> <li>• # of members who start to collect data for the research component</li> </ul>	<ul style="list-style-type: none"> <li>• BCCA (new) staff attended a workshop in Abbotsford.</li> <li>• None this year.</li> <li>• ENP and CCCR have a formal working relationship to deliver an integrated workshop. Promotion, curriculum and delivery have all involved ENP input and collaboration.</li> <li>• None of the BC members have changed the data they track in response to project indicators/reporting with the exception of the Regional site (FVCSE).</li> </ul>
<p>Additional Data: (Source: PSG Notes/ Minutes June &amp; Sept. 06, April &amp; May 07)</p>	<ul style="list-style-type: none"> <li>• The PSG documentation reveals a “thoughtful digging” on the part of members. Their reflections, conclusions and directions to the project have resulted in several initiatives: <ul style="list-style-type: none"> <li>o Research for a discussion paper on T.A. in B.C. was completed. It included a review of U.K. data and identification of possible approaches to improve our TA system</li> <li>o Several meetings with smaller and larger groups affirmed TA as a priority focus and began to shape definition of options to strengthen it.</li> <li>o CCCR convened meetings on social enterprise financing. This has led to a working group focused on examining how to raise equity through tax credits.</li> <li>o Based on what was being learned a major examination of project assumptions related to regional intermediaries was undertaken. This led to reorganization of the B.C. project.</li> <li>o PSG members are thinking ahead to the end of the project and asking what kind of longer term relationship between UCSC, ENP, BCCA and CCE/CCCR might continue to strengthen supports for SE. They have also noted that there are other significant programs potentially ending in March 08, and that efforts to support SE need to be developed within this context.</li> </ul> </li> </ul>

**Interpretation:**

The reorganization of the BC project is a good example of collaboration evolving at the PSG level. In its design and the subsequent implementation of activities, PSG participation has been critical. It is important to note that PSG members meet around other tables; the DW project is only one. However, the DW project has created a unique space, one that facilitates research, learning and analysis that actually leads to defining new approaches that can be further tested. The integrated CCCR – ENP training product and joint promotion and delivery is one good example. Overall there is a sense of progress. It appears the cycle of being able to test and act on jointly arrived at conclusions is contributing to building a SE provincial development system.

**Data Limitations:** None.

<p><b>2. Structuring Outcome: Regional Sites will take ownership of the service delivery</b> <i>There is one regional site remaining in BC. The two new target regions have employed a host organization system for delivery, but it is not expected that the level of service delivery/ownership in these organizations will be as high.</i></p>	
<p><b>Indicators</b></p> <ul style="list-style-type: none"> <li>• # of workshops delivered</li> </ul>	<p><b>Results for 06/07</b></p> <ul style="list-style-type: none"> <li>• FVCSE delivered 2 workshops since June 1/06.</li> </ul>

<ul style="list-style-type: none"> <li>• scope of sectors &amp; communities engaged</li> <li>• # of new products or adaptations developed</li> <li>• # of requests for specific TA support</li> <li>• # of other providers who become familiar with checklist/use it</li> <li>• funders &amp; decision-makers engaged</li> <li>• Effort to leverage TA funds</li> </ul>	<ul style="list-style-type: none"> <li>• The predominant sector in FVCSE is non-profits, with a strong representation of those who serve inmates.</li> <li>• FVCSE has used the Enterprise Selection portion of the workshop independently. No other products developed.</li> <li>• Since June 06 the FVCSE has had 18 requests for assistance ranging from help with grant applications, to board presentations, feedback on documents, referrals to resources, planning support and several feasibility studies. Nanaimo CFDC has had 1 request and responded with free TA coaching for Business Planning.</li> <li>• No reported use of checklist by others in FV region. One consulting group on Island is using tool for planning with clients. SDECB staff have used workshop and tool as well.</li> <li>• WED is a core funder of the FVCSE to March 08. They have not engaged at all beyond their funding role. The ED of their host CFDC and the Advisory Board for the Centre are more engaged now than they were a year ago, due in part to more exposure and understanding, but this is not directly related to the project.</li> <li>• No TA funds are being managed by the FVCSE. In B.C. T.A. funds were not part of the mix because of WED withdrawal. However, the re-profile of the project released \$50,000, of which \$20,000 is dedicated to the Fraser Valley region.</li> </ul>
---	---

**Interpretation:**

Workshops are being delivered and clients are being supported in a variety of ways, all of which testifies that FVCSE takes their responsibility for follow up very seriously. They are also an active participant in all aspects of the PSG work. However, they have not used the DW checklists as a vehicle for reaching out to other target sectors or populations (beyond non-profits) or as a tool for post-workshop coaching with clients. Similarly, the targeting of the workshop is focused on the non-profit sector. This could be due, in part, to a lack of probing or pushing on the part of CCCR staff providing regional site support, and in part to the lack of staff time within FVCSE for anything other than “what is immediate”.

**Data Limitations:**

We do not know if other providers in other regions may be using the material – unless they tell us. See outcome 4 below.

<b>3. Structuring Outcome: Funding will be obtained</b>	
<b>Indicators</b>	<b>Results for 06/07</b>
<ul style="list-style-type: none"> <li>• Project is fully funded</li> <li>• Additional TA dollars are leveraged</li> </ul>	<ul style="list-style-type: none"> <li>• The reorganization of the B.C. project freed up \$50,000 for TA grant funds from the Rural Secretariat contribution. It is intended that it will be leveraged by ENP over the course of this fiscal year.</li> </ul>

**Interpretation:**

WED non-participation impacts were identified in the early sections of this report. Subsequent flexibility on the part of the RS, coupled with coming in under budget, allowed us to test a new approach as well as liberate \$50,000 for technical assistance grants.

**Data Limitations:** None.

<b>4. Structuring Outcome: Workshop materials (including the checklist) and delivery will engage trainers and community orgs in thinking critically about the role of SED in their community.</b>	
<b>Indicators</b>	<b>Results for 06/07</b>
<ul style="list-style-type: none"> <li>• Trainers do their homework &amp; take the learning seriously</li> <li>• Workshop evaluations</li> <li>• SE is a tool that advances their org. mission &amp; goals</li> <li>• Trainers ID value of material &amp; TA supports</li> </ul>	<ul style="list-style-type: none"> <li>• Training the trainers was not continued in BC because FVCSE was trained and other regional intermediaries has been forced to withdraw. The project reorganization is testing centralized delivery to assess if it is more time and cost effective.</li> <li>• BC workshop evaluations since June 06 (4 sessions) continue to highlight the usefulness of the checklist as a valuable tool for community organizations. See below*</li> <li>• The extent to which this is being reflected in the actual SE work will not be known until we conclude the CBO level follow-up interviews.</li> <li>• The pre-set curriculum was a huge value-added for FVCSE. See below for information on other trainers**</li> </ul>
<p>Additional Information:            *(Source: CBO Follow-Up Fall 06 report)</p> <p>**</p> <p>(Source: PSG Reports June 06 to May 07)</p>	<ul style="list-style-type: none"> <li>• CBO follow-up in the fall of 06 indicated that none of the BC workshop participants had referred to the workbook or checklist since the workshop. This is the complete opposite result in Ontario.</li> <li>• By accident we discovered 2 other trainers in BC that are using portions of our workbook/curriculum in their own training. We do not know of others</li> <li>• FVCSE is part of the PSG. As such, they are participants in the ongoing discussion and research focused on strengthening the development system for SE in the province. There is ample evidence throughout the PSG documentation record of FVCSE engaging in critical discussion related to SE in the community, its role, functions, potentials and limitations.</li> </ul>

**Interpretation:**

The workshop evaluations suggest the workshop is engaging and achieves its intended outcomes. The extent to which the workbook and materials are used outside the workshop is the key question here. FVCSE does not explicitly use the checklist, and we know from fall 2006 CBO follow-ups that none of the workshop participants had looked at the workbook post workshop. It would “seem” then that although the resource is praised in workshops, it does not in fact get used or referred to after the sessions. This is a complete contrast with Ontario. We are not clear about why this is, but this will be explored in subsequent CBO follow-ups beginning this month.

The PSG, rather than the workshop materials, appears to be the key forum for ongoing learning and dialogue related to the SE in the community. The role of the regional intermediary as a contributor to this discussion has been important. However, in this case it is the process and engagement with peers that is the critical factor. (see outcome 6)

**Data Limitations:**

The outcome “engaging them in thinking critically about SED in their community” is not actually measured by the indicators or data available. The indicators we have data for are measuring value for the purpose of organizational assessment, but are not measuring the value for thinking more broadly about the role of SED in the community. This outcome, for regional organizations, is linked to outcome 2. “Ownership” implies applications in new ways and is related to understanding specific targets and opportunities for SE as a tool for community strengthening.

Also see outcome 2 above for related information on developers who have attended workshops and been oriented to the tool, but who have not yet applied it that we know of. We do not know if other providers may be using the material – unless they tell us. See outcome 5 below.

<b>5. Structuring Outcome: Workshops will increase profile and regional relationships for Regional Organizations (Reg Orgs)</b>	
<b>Indicators</b>	<b>Results for 06/07</b>
<ul style="list-style-type: none"> <li>• Reg orgs have an increased Data Base (DB) of community contacts</li> <li>• Reg orgs get more requests from community groups</li> <li>• # of media stories over project</li> <li>• # of requests from non-project consultants &amp; orgs to participate in training</li> </ul>	<ul style="list-style-type: none"> <li>• FVCSE data base is over 1,000 – more than some provincial level organizations. Several hundred non-profits were added through the DW project.</li> <li>• Since the last workshop in the Fraser Valley, the centre has seen a marked increase in requests for help. This has been attributed in part to the proactive outreach approach of the centre, and in part to their increased credibility and visibility.</li> <li>• Nanaimo CF has had 1 CBO request Business Planning support &amp; has offered several days of free TA to this end.</li> <li>• There was media coverage both pre-workshop and in one region post workshop as well (Nanaimo &amp; Vernon).</li> <li>• Workshops in Vernon attracted two non-host CFDCs and several consultants, but there has been no follow-up to date to determine their use of the tool or other impacts. We do know that one of these CFDCs has now joined the discussion group on how CFDCs can be more effectively engaged in TA for SE, as has the Nanaimo CF that hosted.</li> </ul>
<ul style="list-style-type: none"> <li>• Additional Information: <i>(Source: Survey Monkey workshop registrations)</i></li> </ul>	<ul style="list-style-type: none"> <li>• Of all those who registered for workshops in BC to March 07, 25% had never heard of the host organization, 25% had high awareness of the organization, and 50% were in the middle – had heard of them but didn't know much about them.</li> </ul>

**Interpretation:**

FVCSE has reported specific impacts in terms of visibility and credibility. One of the observations from FVCSE is that they have been working to raise their profile for 2 years and are just now starting to see evidence of this work paying off in terms of requests and clients. There is some anecdotal evidence from the Nanaimo CFDC that having the workshop at their office was good exposure to the non-profit sector, but to date (since Feb. 27) there has been only 1 contact as a result of that exposure. We know that CBO's take longer to do their SE development work than anticipated, and it could be that it takes more concerted effort than one workshop to establish relationships between regional organizations and CBO's. About 25% of participants are getting their first exposure (to the host organization), and another 50% are getting increased exposure.

**Data Limitations:**

The indicator related to other consultants wanting to be trained is misleading given the free download on the website where there has been 209 downloads in the last year. In BC we know of 2 trainers that are using portions of the workbook but neither has attended a workshop and we discovered them completely coincidentally.

<b>6. Structuring Outcome: The information collected through the research component will inform our understanding of issues &amp; opportunities</b>	
<b>Indicators</b>	<b>Results for 06/07</b>
<ul style="list-style-type: none"> <li>• PSG input</li> <li>• Extent to which the project adapts as we gather new information.</li> <li>• # of initiatives to which members attribute project participation or information as a contributing factor</li> <li>• types of initiatives</li> </ul>	<ul style="list-style-type: none"> <li>• The restructuring of the project was itself a result of learning from the research component. (see outcome 1)</li> <li>• PSG meetings have driven a process of research, discussion and adaptation that has significantly contributed to learning and planning.</li> <li>• 8 examples: MOU between ENP and BCCA related to access to technical assistance, TA paper assessing BC context, special meeting of TA providers from different parts of the Province with PSG (November 06), FVCSE proactive outreach to CBOs, 4 re-profile objectives &amp; related activities; See below*</li> <li>• Re-profile includes central delivery of workshops (integrated with ENP) &amp; free distance TA; ongoing discussions with CFDCs around TA &amp; SE; TA discussion groups; ID of TA providers in target regions; TA grants for target regions</li> </ul>
<p>*Additional Information: (Source, P&amp;R Second Report BC 2006)</p>	<ul style="list-style-type: none"> <li>• For a number of the initiatives listed above, a few PSG members suggested that they “would have got there/done that” regardless of the project. They did all agree however, that the information and discussions were pushing them to get clearer about SE development factors, and their roles:  “<i>The project has allowed a systematic analysis of the factors involved in SE development.</i>”  “<i>It has made my SE work more intentional.</i>”  “<i>The project has helped us see how our work fit into the broader role of SE in communities, so we are responding more appropriately.</i>”</li> </ul>

**Interpretation:**

The re-profiling of the project in late 2006 and the stream of research and discussion related to strengthening the technical assistance capacity in the province is the most tangible evidence of how our learning and experience in the first year has informed our understanding. This has resulted in both new ideas about what is required to establish a development system and to more informed questions that in turn have driven activities designed to find some answers. The impact of the research on PSG members has therefore been more related to strengthening the B.C. SE development system than on operational level within their own organizations. The exception is ENP who has expanded operations more quickly in rural areas of the province than otherwise would have been the case.

**Data Limitations:**

The BC PSG have identified (PSG Conference call & in person meetings April & May 2007) that the questions in the Provincial & Regional survey tool are missing the mark – that they are not getting at some of the core underlying issues in the same way that is reflected in our conversations. See Outcomes 1 and 7.

<b>7. Structuring Outcome: Communications activities will increase awareness and understanding of SE</b>	
<b>Indicators</b>	<b>Results for 06/07:</b>
<ul style="list-style-type: none"> <li>• # of requests for newsletter from non-project orgs &amp; individuals</li> <li>• # of downloads of materials</li> <li>• anecdotal feedback on materials</li> <li>• # of requests for workshops in non-project areas</li> </ul>	<ul style="list-style-type: none"> <li>• There is no means to distinguish non-project related downloads. The newsletter has received 800 downloads in English and 1000 downloads in French.</li> <li>• 209 English &amp; 15 French of Building Community Wealth</li> <li>• None</li> <li>• None in B.C. since June 2006</li> </ul>

**Interpretation:**

The workshop itself is having an impact on awareness and understanding (as reported in workshop evaluations), but there is no concrete evidence that other communications activities are, although there have been anecdotal reports about the usefulness of the newsletter as a way of keeping in touch with the project. Follow up on downloads of the workbook (all of which have to register) may yield a better understanding. Early requests for workshops outside of project sites did not transpire due to cost implications for host organizations.

**Data Limitations:**

It could be that the newsletter and or downloaded materials are having impacts, but we have done no follow-up work with workbook downloads and with the newsletter we have no way of knowing unless users are proactive in contacting us.

### c) Provincial and Regional Organizations: Outcomes 8 & 9

<b>8. Provincial/Regional Org. Outcome: Increased Awareness of and Commitment to SE</b>	
<b>Indicators</b>	<b>Results for 2006/07</b>
<p>Levels of board, staff and member awareness and commitment</p> <ul style="list-style-type: none"> <li>• Extent organization is active in SE development</li> <li>• Extent that SE is relevant to achieving org. mission</li> <li>• Existence of a strategy to focus resources and effort on SED</li> </ul>	<ul style="list-style-type: none"> <li>• PSG members reported that board &amp; staff awareness was the same or slightly higher than at the end of 2005. This was not attributed to the project, but to their own efforts. Members did report however that the project had elevated their own awareness &amp; understanding of the components of SED &amp; how they work together.</li> <li>• PSG members remain as active, or more active, in their SE development activities. See below* for additional comment.</li> <li>• This was rated as high for all PSG members as it was in 2005.</li> <li>• PSG members include SE as a focus of their organizations strategies and related activities. The extent to which it is documented varies between organizations.</li> </ul>
<p>* Additional information from PSG interviews (Source: DW Project Provincial/Regional Report for 2006, Feb. 2007)</p>	<ul style="list-style-type: none"> <li>• It must be noted that while existing PSG members are quite active and committed to SED, we have had 3 provincial organizations and 1 regional organization either formally withdraw, or simply not attend meetings. We know that for the regional organization it was a lack of funding/staff capacity, and that for 1 provincial organization it was lack of commitment to SE overall. It is not clear why the other 2 provincial organizations have reduced participation, although we know that staff changes and maternity leaves are a factor.</li> <li>• BCCA, ENP &amp; FVCSE reported shifts in their strategies related to SE (ID of target groups, expansion of rural delivery &amp; proactive outreach respectively). BCCA &amp; ENP did not attribute this shift to the project however.</li> <li>• Awareness was noted as being much higher for the Rural Secretariat member who is making more and better referrals to PSG members as a result of the project.</li> </ul>

#### **Interpretation:**

The evidence suggests that the project has not had a notable impact on awareness or commitment of PSG members. This is in stark contrast to Ontario where on almost every indicator the impact of the project was clearly demonstrable. How to interpret the difference is not clear. One explanation may be that in the francophone context the introduction of the DW tool was into a relative vacuum of tools and resources available in French. It may be that the members of the PSG have had a higher awareness and commitment from the outset. When one considers outcome 6 related to the impact of the research, it may be that the experience base being higher may be an important part of the explanation.

#### **Data Limitations:**

It could be that this outcome assumed much lower levels of awareness and commitment than originally existed. The members of the PSG (who are still participating) have a strong, strategic focus on SE – which is why they are participating.

**9. Provincial/Regional Org. Outcome: Increased Capacity for SED direct service delivery, referrals, screening, awareness & use of resources, and extent and nature of relationships**

Indicators	Results for 2006
<ul style="list-style-type: none"> <li>• Extent to which organization actively promotes SE</li> <li>• # of new SEs worked with in last year</li> <li>• # of expanded SEs worked with in last year</li> <li>• # of training sessions on SE in last year</li> </ul>	<ul style="list-style-type: none"> <li>• All current PSG members are very active in the promotion of SE through in person, print and electronic mediums.</li> <li>• 3 organizations report 29 new SE clients for 2006 year; 2 organizations did not know</li> <li>• unknown</li> <li>• 4 organizations report 23 training sessions during 2006; 1 organization did not track this information; this is down from 65 reported in 2005; of the 23 sessions, 6 were DW workshops</li> </ul>
<ul style="list-style-type: none"> <li>• # of participants in training sessions in last year</li> <li>• # of SE clients for organizational development TA in last year</li> </ul>	<ul style="list-style-type: none"> <li>• 465 people (approximate) attended these sessions; this is up from 300 reported in 2005; approximately 120 of these people attended DW workshops</li> <li>• 2 organizations report 18 clients with this focus. One did not track this information; down substantially from 2005 due in part to lack of tracking by BCCA (56 contacts of this kind in 05)</li> </ul>
<ul style="list-style-type: none"> <li>• # of SE clients for business dev. TA in last year</li> <li>• # of SE clients for after-care TA in last year</li> <li>• # of SE clients referred for TA in last year</li> <li>• # of SE clients referred for loans/grants in last year</li> <li>• # of SE loans/grants made in last year</li> </ul>	<ul style="list-style-type: none"> <li>• 2 organizations report 11 clients with this focus; 1 did not track this information</li> <li>• 1 organization reported 4 clients of this type</li> <li>• None formally track this information</li> <li>• None formally track this information</li> <li>• 2 organizations made 39 grants for SED; 1 organization made 7 loans; very slight increase over 2005</li> </ul>
<ul style="list-style-type: none"> <li>• Existence of a screening tool to assess readiness</li> </ul>	<ul style="list-style-type: none"> <li>• Those reporting they use a screening tool is up slightly; none use the DW tool for this purpose &amp; several use "informal conversations" to screen</li> </ul>
<ul style="list-style-type: none"> <li>• Effectiveness of screening tool</li> </ul>	<ul style="list-style-type: none"> <li>• Good for those who use a formal process.</li> </ul>
<ul style="list-style-type: none"> <li>• Level of awareness of resources for SE</li> <li>• Level of availability and accessibility of TA services</li> </ul>	<ul style="list-style-type: none"> <li>• This remained relatively high for 2006.</li> <li>• The rating for this went up from 2 to 3 in 2006 (out of 5). There was an increased focus on the quality of TA being provided.</li> </ul>
<ul style="list-style-type: none"> <li>• Level of availability and accessibility of credit</li> </ul>	<ul style="list-style-type: none"> <li>• This rating stayed the same for 2006 (3 out of 5) but participants noted this year that the gap was specifically related to patient or flexible capital, and that this was related to the quality of TA: that if TA was of a higher quality and more accessible then more capital would flow. They also noted that non-profits, in general, are risk adverse.</li> </ul>
<ul style="list-style-type: none"> <li>• Level of business / non-</li> </ul>	<ul style="list-style-type: none"> <li>• No data</li> </ul>

<ul style="list-style-type: none"> <li>profit partnerships for SE</li> <li>Extent to which organization is involved in influencing the policy context</li> <li>Nature and significance of local, provincial and federal level relationships for purpose of SE</li> </ul>	<ul style="list-style-type: none"> <li>The number of PSG members involved in influencing policy increased from 4 in 2005 to 6 in 2006. Participants noted that this was due to the increased need, rather than to the project directly.</li> <li>Significant relationships changed in 2006. PSG members were no longer citing WED, Community Futures Association or CCEDNet and organizations such as Van City, ENP, Coast Capital and CCE were mentioned more often than in 2005.</li> </ul>
<ul style="list-style-type: none"> <li>Additional Information related to overall <u>capacity for SED at a system level, rather than within any one organization:</u> <i>(Source: BC Re-Profile Proposal (8))</i></li> </ul>	<ul style="list-style-type: none"> <li>ENP is able to deliver more workshops rurally due to the project.</li> <li>ENP has access to grant funds for those rural regions, providing increased access for CBOs, and an opportunity to leverage the funds in future years.</li> <li>We understand better now what CBO's need, and the time/capacity it takes to establish a SE.</li> <li>There is progress being made with CFDCs and their role in providing TA for SE.</li> <li>There is progress being made in identifying TA providers in rural areas.</li> <li>There is progress being made to more clearly define the SE support or development system and where we might most effectively influence strengthening it.</li> </ul>

**Interpretation:**

The outcome is focused on capacity for direct service delivery. It is evident however, that in B.C. the nature of project impacts are primarily at the system development level. These are not captured by these indicators. Indeed, it has been suggested that the research instruments for the provincial and regional organizations have been of limited utility. The documentary record of discussions, meetings and phone conferences yield a much richer data base for tracking and analysis of impacts. The impacts that have been noted are related more to the quality of thinking about how to more effectively organize services than the quality of services themselves. The impact is also evident at a systemic level more than within any given organization. The outcome as formulated and the related indicators do not effectively pick up on the conceptualizing, negotiating, experimenting and learning about the aspects of the BC development system that have taken so much attention in the BC project. The PSG members have requested that we find ways to identify and document this for the final report.

**Data Limitations:**

First, because there are gaps in data being reported from organizations that did report in 2005, the numbers related to levels of service are not reliable indicators of any changes in activity.

Second, most of these indicators assume that PSG organizations will be operationally impacted by the tool/the project; the assumption being that if the tool/project is having impacts we will see an increase in SE services delivered. This has been shown not to be the case.

## d) Community Based Organizations: Outcomes 10 - 13

<b>10. Community Based Org. Outcome: We understand the reach of the project in terms of types, mandates and goals of organizations engaging in SE Development.</b>	
<b>Indicators</b>	<b>Results to date: N = 130 participants</b>
<ul style="list-style-type: none"> <li>• Legal structure of org.</li> <li>• Revenue sources of org.</li> <li>• Sectors of focus</li> <li>• Populations of focus</li> <li>• Purpose for SED</li> <li>• Current SE focus/results</li> </ul>	<ul style="list-style-type: none"> <li>• 85% of workshop participants represented an organization: 46% are non-profits or charities, 18% co-ops, 3% private.</li> <li>• Revenue sources in rank order are: Gov. grants, Foundations/Corporate grants, &amp; Contracted services/other fund raising tied for 3<sup>rd</sup>.</li> <li>• 52% identify with social support services, 29% education/training, 26% employment supports &amp; 16% identify with housing &amp; with healthcare</li> <li>• Most identified with “the community at large” but target populations mentioned most often include Aboriginal, Youth/Children/Families, Women, People with Disabilities &amp; Inmates. 77% identified clients who were on welfare or unemployed as a primary target group.</li> <li>• No data on this. <b>This will come from the revised CBO Follow-up survey for the final report.</b></li> <li>• 62% exploring, 9% developing an enterprise, 12% already own an enterprise</li> </ul>

### **Interpretation:**

In BC the non-profit sector has been the primary audience for workshops with a sprinkling of co-operatives and even less private sector businesses. Social service related activities predominate among those attending workshops. Most are at very early “exploring” stages. This data will be more useful once we have better information about actual progress toward SED. In other words, which ones are making progress and why and what are the implications of this for the focus of intermediary organizations in the future?

### **Data Limitations:**

The data only tells us about those who are registering for workshops, rather than all those who are “engaging in SE Development”. It is not clear why, for example, we would have 18% co-ops and only 12% indicating they already own a social enterprise – unless some co-ops did not see themselves as social enterprises? This could be representative of the confusion that exists in terminology: co-op, social enterprise, sector versus population, etc. The percentages run over 100% in some cases where respondents were asked to check “all that apply”. Some respondents skipped questions as well so data may be slightly skewed.

<b>11. Community Based Org. Outcome: Increased awareness of SE &amp; Resources</b>	
<b>Indicators</b>	<b>Results to date: May 07</b>
<ul style="list-style-type: none"> <li>• Prior awareness of Reg. Org.</li> <li>• Level of interest in SE pre-workshop</li> <li>• Level of interest in SE post workshop</li> <li>• Understanding of SE post workshop</li> <li>• Usefulness of workshop activities &amp; resources</li> <li>• Use of resources post workshop;</li> <li>• Additional resources required</li> <li>• Appropriate use of Reg. Org. post workshop <i>(Preliminary results from Fall 2006 Follow-Up Survey)</i></li> </ul>	<ul style="list-style-type: none"> <li>• Of all those who registered for workshops in BC to date, 25% had never heard of the host organization, 25% had high awareness of the organization, and 50% were in the middle – had heard of them but didn't know much about them.</li> <li>• 62% exploring, 9% developing an enterprise, 12% already own an enterprise</li> <li>• Data not available</li> <li>• Almost 100% of participants indicate an increased understanding of SE.</li> <li>• This continues to get an average rating of 4.5 (out of 5) from participants.</li> <li>• Over 50% of participants indicate that they think the checklist will be a useful tool after the workshop; about 25% indicate they will "use them all"; less indicate they will use the entrepreneurial assessment.</li> <li>• Data not available; <b>This will come from the CBO follow-up questions about barriers, and about resources required.</b></li> <li>• The CBO Fall 2006 survey (N=14) suggested that 43% of those interviewed were not clear about the role of the regional organization, or how it could help them. This, combined with lessons from the UK around the need for proactive outreach to CBO's, resulted in a change in strategy in BC: FVCSE initiated contact with CBO's and CCE offered distance TA in other regions.</li> <li>• To date, FVCSE is providing funding application support, board orientations, and general planning support to workshop "graduates". The 2 requests for CCE distance TA are for similar activities. These are appropriate early stage activities. We do not yet understand why others are not accessing TA supports that are available.</li> </ul>

**Interpretation:**

There is no doubt that workshop participants end up with a greater understanding of SE, of what it takes (the steps & skills), and of some of the available resources. There have been comments since the integration of the CCE/ENP curriculum that participants would like more time getting familiar with the workbooks. The session now offers participants both the Building Community Wealth workbook and the ENP Guide to Social Enterprise, which is referred to but not worked with during the session. These are among the best resources in the country, but could be daunting given how much reading they represent? The shift to more proactive outreach to CBO's has increased their access to the regional organization as well.

**Data Limitations:**

While we will not have quantitative data until the final report, it appears that although resources and tools are rated high during the workshop, they do not in fact get used a great deal afterwards. We are not sure why this is.

**12. Community Based Org. Outcome: Assessment of Readiness and ID of priority tasks**

Indicators	Results to date: May 07
<ul style="list-style-type: none"> <li>• ID of readiness for SED &amp; impact of workshop</li>   <li>• Why or why not</li>   <li>• All tasks over next year</li> <li>• Priority tasks</li> <li>• ID of tasks that require outside assistance</li> <li>• Types of tasks that require assistance</li> <li>• ID of who can provide that assistance</li> </ul>	<ul style="list-style-type: none"> <li>• 100% of workshop participants to date have agreed that the workshop helped them assess their readiness, however, some note that they now need to go back to their organizations and get others to support their conclusion. The workshops are very cost effective, but some participants will require additional presentations to their organizations. It is important to have key decision-makers attend.</li> <li>• In most cases, those who have said NO, they would NOT proceed with SED, have identified lack of organizational stability or capacity as the key reason; a few have decided NO because they realize SE is not what they thought it was.</li> <li>• The Next Steps Questionnaire is the primary tool used to document the decisions in the left hand column. It is based on the SE Checklist. It has been through several variations, but there continue to be concerns about it's usefulness: <ul style="list-style-type: none"> <li>o It DOES serve as a means for workshop participants to assess their readiness and/or what steps they may have missed if they have a SE operating already.</li> <li>o The degree to which the specific next step priorities are accurate is not clear: some participants check every task as a priority, some cannot be sure since they need to do more detailed planning within their organization.</li> <li>o Participants leave their copy of the Next Steps with us, so they do not take it back as a source of further refinement/discussion.</li> <li>o The follow-up with workshop participants who have completed a Next Steps that is beginning now through March 2008 should help us understand more about this.</li> </ul> </li> <li>• In Abbotsford recently, FVCSE called each participant from the March workshop. Staff had the Next Steps in front of them during the call &amp; found that in most cases, after a month, participants were still planning/discussing and had not taken any steps. The steps they had indicated in the Next Steps Questionnaire were accurate about 50% of the time, but this was quite a small sample (9). All have (or will be) taking advantage of the offer of free early stage TA.</li> </ul>
<ul style="list-style-type: none"> <li>• Additional Information: <i>(Source: CBO Fall 2006 Summary Report)</i></li> </ul>	<ul style="list-style-type: none"> <li>• 14 CBO's in BC were interviewed 3-4 months after attending a workshop. Of these, 5 (36%) had not made any progress and were not sure they would due to internal organizational challenges. The other 9 organizations who had made progress cited the workshop, board support, the availability of ENP funds, the regional intermediary, and their own (individual) ability to give leadership as key factors in their progress (not in rank order).</li> </ul>

**Interpretation:**

There are two aspects to this outcome. The first, is the extent to which the particular tool – the DW – is a useful means of helping CBO's to assess readiness and identify priority tasks. It is clear

that as a readiness assessment tool it does the job. As a priority setting tool that is used over time it is not so clear in B.C. This will be pursued in the CBO follow-up interviews over the next 6 months. The second aspect is related more broadly to the BC Re-profile objectives that are striving to improve access to and quality of TA for SE. Regardless of whether or not participants in the project are using the tool, or it is useful to them, the next phase of research needs to be probing around questions of organizational leadership, capacity and resources to identify more clearly what the factors are that contribute to success with SE in some organizations, and not in others. This may assist in improving the readiness assessment process and specific targeting of TA.

**Data Limitations:**

We are not sure of the accuracy or reliability of information in the Next Steps Questionnaire.

<b>13. Community Based Org. Outcome: Completion of tasks required related to Organizational Development, Enterprise Development, Community Participation and Strategic Networking and Use of Technical Assistance</b>	
<b>Indicators</b>	<b>Results to date:</b>
<ul style="list-style-type: none"> <li>• Which tasks (from 1<sup>st</sup> questionnaire) were completed</li> <li>• Which tasks were not</li> <li>• Use of tool</li> <li>• Problems that prevented task completion</li> <li>• Nature of tasks requiring assistance</li> <li>• Use &amp; impact of Reg. Org.</li> <li>• Access to other TA providers</li> <li>• Access to grants</li> <li>• Access to financing</li> <li>• Scope of relationships &amp; networks compared to baseline</li> <li>• Degree of impact of project/tool on above</li> <li>• Overall impact on organization</li> </ul>	<ul style="list-style-type: none"> <li>• The CBO follow-up that asks all of these questions will be reported on in the final report – it is just beginning now.</li> <li>• This is also where we could speak to what we learn from national TA discussion (ENP facilitators, Leo, etc.) and pull in what we learn from the CBO follow-up re: use of the tool for ongoing planning – how adaptations were motivated – when/why and when/why not tool is effective as a CBO tool.</li> </ul>

**Interpretation:**

We expect to learn more from the CBO follow-up work to be completed in the next 6 months. Notwithstanding that we need to learn more about what CBO's require for success with SE, and how to create a TA system that is accessible and of high quality, our findings to date are fairly consistent around several key points summarized here and in Objectives 14 and 15 below.

**Re-Profile Objectives: 14 – 17 All these objectives were formulated in the re-organization of the project undertaken in late 2006..**

<b>14. Re-Profile Objective: To increase the access to technical assistance for groups and organizations at the very early stages (phases 1 and 2 within the Development Wheel framework) and assess the impacts of its availability, at no or low cost, on social enterprise formation.</b>	
<b>Activities</b>	<b>Results to date: May 07</b>
<ul style="list-style-type: none"> <li>• Workshop participants who complete a Next Steps have access to one day of free, distance TA.</li> <li>• <b>Assessing impacts of this approach will be the focus of activity in the Fall of 07.</b></li> <li>• Identification of additional TA providers.</li> </ul>	<ul style="list-style-type: none"> <li>• Offers of free TA were made one month after workshop to all participants. To date 16 out of 42 participants (38%) have responded and are being supported in some way:               <ul style="list-style-type: none"> <li>o All 9 of the Abbotsford participants are receiving assistance – largely with proposal writing (ENP funds), or board presentations. FVCSE staff called each participant, and they are locally based, which might be the reason for the 100% response here.</li> <li>o From Nanaimo, 1 group was connected with food sector TA, and the other will receive a board/staff workshop in June. (see example at Outcome 12)</li> <li>o In the Okanagan there is a cluster of (5) retail SE's that are being supported to examine opportunities for group buying, etc.</li> </ul> </li> <li>• There have been 2 meetings with CFDCs to date and another planned for June. The Vernon &amp; Nanaimo CFDCs are among this group. There are 6 or 7 CFDCs interested in providing TA for SE, however there are concerns about impact on staff time and lack of expertise related to the culture shift. There is interest in looking at opportunities to use Disability Loan Funds for SE, and in exploring how they might target existing business people to establish SE's.</li> <li>• 1 individual TA provider has been identified on the Island and 2 the Okanagan. The Island company has been engaged with John Howard Society already.</li> </ul>

**Interpretation:**

It is too early to form conclusions, however activities are progressing as planned and we continue to observe, test, and track responses in an effort to identify the impacts of early stage TA. The proactive, outreach approach is generating responses, but there are questions related to why the offer of free T.A. it isn't creating MORE demand. Once again the follow-up with CBOs is a key next stage activity that will tell us more. Nevertheless, as the John Howard Society illustrates on the page following, the potential for a better organized TA system has real potential.

---

## Story: John Howard Society – Making the Links

The Nanaimo John Howard organization responded quickly to the offer of distance TA from CCCR after the Nanaimo workshop. They indicated they owned a house and wanted to develop a commercial kitchen to employ clients and provide pre-packaged meals to other non-profits. They also had a Vancouver Island Health Authority contract in place for the training/employment portion. The steps taken provide a good indication of how an improved SE development system might work.

1. They were referred immediately to Edible Strategies (ES) a technical assistance group working within the food sector on Vancouver Island. ES made a site visit and immediately connected them with an expert on commercial kitchens and with another local non-profit who was also developing a food services SE so they could explore opportunities for collaboration.
2. CCCR convened a call with all providers to ensure roles were clear and identify next steps based on this initial assessment of the TA needs.
3. ES agreed to provide an additional day of free support to get a plan in place and work with John Howard on their ENP application.
4. The application is now in with a request for funds for a marketing strategy, which will feed into a Business Plan as well as some additional board training on managing an SE. John Howard has paid for the kitchen assessment and renovation plan themselves.

This story illustrates a couple of the features that need to be considered in building a more effective TA system for SE in the province.

- ✓ The role, in this case, of CCCR as broker that helps ensure quality control of the TA
- ✓ The responsiveness of Edible Strategies and their ability to provide free, early stage supports with the understanding of paid downstream work.

Of course, it is important to note that the capacity within the CBO itself is a key factor. In this case there was staff leadership that knew what they needed and they already had some resources in place.

---

**15. Re-Profile Objective: To design, using an action research approach, a strategic and coordinated strategy to provide and/or broker high quality technical assistance at reasonable costs. Within the Development Wheel framework this relates to some phase 2 tasks and most phase 3 and 4 tasks.**

Activities	Results for 06/07
<ul style="list-style-type: none"> <li>• A TA discussion group has been organized for June that will include 6 TA providers and 5 CBO's with some SE experience. A second group will be convened in the fall.</li> <li>• ENP has started to collect resumes of TA providers and establish a qualified pool as a first step.</li> <li>• Identification of TA providers related to objective 13 is also relevant to this objective.</li> <li>• Participating with ENP &amp; CCEDNet in a coalition to advance a CEDIF (from Nova Scotia) type of tax credit program for SE.</li> <li>• Exploring opportunities for building SE networks on a sector basis.</li> </ul>	<ul style="list-style-type: none"> <li>• None to date.</li> <li>• Ongoing</li> <li>• In Nanaimo, a past ENP applicant used funds for market research and is now ready for the Business Planning stage. ENP directed them to the Nanaimo CFDC, who agreed to provide up to \$2,000 worth of free supports to this end. Also see Objective 13 above.</li> <li>• This activity has been informed by project lessons related to the significance of TA as it relates to building demand for credit and or investments in SE. The coalition recognizes the need for more than capital if SE is to gain any credibility and impacts locally.</li> <li>• This has emerged from recent PSG discussions (April and May 07) as another means of increasing support, learning and establishing some leadership from the base.</li> </ul>
<ul style="list-style-type: none"> <li>• Additional Information: (Source: PSG Notes from May 07)</li> </ul>	<ul style="list-style-type: none"> <li>• Strengthening technical assistance delivery requires consideration of the following:               <ul style="list-style-type: none"> <li>o A means of connecting, supporting and brokering TA: a co-operative or network of TA providers</li> <li>o The means to support this function: possible allocation of grant funds to support this function and potential for financing to have built in after-care funds are two ideas</li> <li>o Inclusion of a mentoring and/or professional development component for providers</li> <li>o Identifying how organizations currently giving leadership will define their roles and relationships after the project; where is the capacity for leadership?</li> <li>o Identifying opportunities to target economic or population based sectors and to establish networks among existing SE clusters (eg: healthcare, retail, food).</li> </ul> </li> </ul>

**Interpretation:**

It is almost impossible to pull apart objectives 14 and 15 above. In most cases, with the exception of very specific sector specific expertise (for example, around alternative energy, tourism, agriculture, etc), the TA providers of early stage supports will be the same as those providing later stage supports. One of the questions that we hope to learn more about is the interest and ability of TA providers (who also need to earn a living) to provide some level of early stage, free TA support. Another question is about their interest in being part of a network of providers who are sharing resources and learning from each other. The engagement of the

Nanaimo CFDC as the first workshop host and subsequently as a (pro bono) TA provider is illustrative of progress in “linking in” a broader base of TA expertise, but is unlikely to be replicated in every CF region. To what extent these factors are critical for establishing an accessible, high quality SE development system is one question, and how to cost effectively coordinate or manage this system (whatever it looks like) in the future is another. Both will be explored over the next 6 months.

---

## **Story: A Project In Development : Social Enterprise Retail Cluster in the Okanagan**

In Vernon, a social enterprise called Mango's runs a drapery overstock retail outlet and uses the proceeds go to support youth programming in Vernon. The business is essentially based on buying containers of overstocked material from major department stores and retailing it in the local market. Mangos has been able to piggy back supply through cooperation with an enterprise known as Penny Lane in Summerland.

However, sales were going down and cash flow was getting thin. In desperation, they cut prices to dump stock and generate cash. Sales shot up to the point of reaching liquidity, thus they have been able to carry on.

Whitevalley Community Resources had recently joined the group purchasing process and is now reselling clothing in Lumby (15 KM away from Vernon). All of these organizations were concerned about quality and consistency of supply. If their current supplier were to refuse or go bankrupt they would cease to operate. Diversification of supply and product is a key concern.

They all came to the Dev Wheel workshop in Vernon. The DW facilitator had worked with both Vernon Youth Literacy Society and Whitevalley in the past and was able to draw on those relationships to build trust. Concluding the workshop, a small strategic planning session was held to identify specific needs and next steps for a combined development strategy for diversifying supply and improving retail sales capacity. The possibility of expanding co-operative purchasing capacity with other CBOs in the province in achieving greater quantities of scale was explored. A draft survey was developed and tested to be sent to known non-profit retailers across the province to gauge their interest in such a venture.

All of this led to a call being convened between the between some key members of the provincial steering group and the core people involved. ENP and United Community Services Co-op reviewed next steps with them and discussed their ENP TA application. It was decided the survey to other non-profits was premature as a provincial purchasing network would be equally venerable to supply chain breakdown. Now, the organizations are presenting a combined application to ENP to look at diversifying supply and are expected submit an application to develop a province wide network in the fall.

This story illustrates several features of a TA system – the role of the workshops in drawing people into relationship, the role of the broker/convenor (CCCR in this case), the role of TA grants and finally, the need for excellent TA providers to help get the work done when the time comes. Likewise, certain features of the CBO capacity are worth highlighting, as they determine the entry point for TA. First, this group had business understanding of the need reach economies of scale and the potential for collaboration to achieve this. They were also already linked to some extent and third, their common sector base made clustering of efforts a easy option to pursue.

---

<b>16. Re-Profile Objective: To work with key stakeholders to develop a provincial, rural social enterprise grant fund that will compliment and expand opportunities for longer term leveraging of funds by ENP and others in this field.</b>	
<b>Activities</b>	<b>Results for 06/07</b>
<ul style="list-style-type: none"> <li>ENP is delivering up to \$50,000 in additional rural grants in target regions and working to establish links to CU's and others in those regions.</li> </ul>	<ul style="list-style-type: none"> <li>Ongoing – too soon to know.</li> </ul>

<b>17. Re-Profile Objective: Based on the results that emerge from these three components and the strategy outlined in this proposal, and the work in the Fraser Valley site, make recommendations that could realize a sustainable, high quality technical assistance system for social enterprise development in B.C.</b>	
<b>Activities</b>	<b>Results for 06/07</b>
<ul style="list-style-type: none"> <li>As above</li> </ul>	<ul style="list-style-type: none"> <li>Premature to report on this.</li> </ul>

### **III. Conclusions for BC**

#### **Summary of Key Impacts to date:**

- The DW project has created both the space (the PSG table) and the supports to enable organizations to think and plan together. More than that, the cycle of applied research being fed into discussions is enabling ongoing progress to be made at both the development system level and, to a lesser extent, at the organizational level.
- ENP and FVCSE organizations have benefited most directly from the project. They have built additional capacity that has allowed them to “do more with less” as well as adapt their service delivery methods to better serve CBO's and communities. ENP has been able to expand its reach in rural communities more rapidly and broadly as a results of the project.
- The workshop is a efficient and effective means of introducing SE and helping CBO's assess their readiness.
- The engagement of the Nanaimo CFDC (by ENP) in downstream TA after the workshop is one example of successful engagement of regional organizations. This CFDC has also joined the CFDC discussion group subsequent to participating in the workshop.
- While we still have questions related to the capacity and TA requirements of CBO's starting a SE, we understand much more than one year ago and have focused future activities to help us answer outstanding questions.

#### **Summary of Key Lessons to date:**

- This process of planning, applying, assessing, learning, re-planning, applying again, etc. was not fully anticipated in the research design and thus we have no indicators that speak to the huge amounts of time and energy it takes, or to measuring the types of organizational and system level impacts.
- Related to this, we assumed that project impacts would be more targeted at the quantity of organizational service delivery when in fact there have been more impacts on the quality of

services and on the integration and coordination of system actors than on individual organizations.

22. The time spent in training regional trainers for the workshop was not warranted. Demand is such that centralized delivery is more time and cost effective. Early interest in CFDCs to play a more active role is encouraging.
23. It will take far more time than we anticipated to generate the volume of social enterprise activity estimated in the original proposal.
24. The tool itself is very useful as part of the workshop curriculum but the framework of steps and types of tasks it presents has not been picked up in other ways, at least in B.C., or even applied post workshop as far as we know. Ontario results contrast with this starkly. There will likely be more discussion of this after the CBO follow-ups are completed.
25. The major impacts to date have come primarily as a result of the leadership/support CCCR staff has been able to provide and the process of learning from the applied research itself.

### **Outstanding Questions:**

26. Given the collaborative effort of multiple players in BC, some of which are outside this project, it is very difficult to definitively assess impacts. How do you pull out one role, or one activity, when in reality it is a series of roles and activities (and sometimes good timing or luck) that have contributed to a shift, or a new opportunity being realized?
27. What are the other factors that contribute to CBO success with SE development and how can we better assess readiness and/or focus our limited resources where there might be greater impacts?
28. With regard to scaling up of the tool, do we need to follow-up with those who have downloaded the workbook from the website, or otherwise do more to identify the potential of the tool after the project? What else do we need to know in order to decide how important the tool is to SE assessment and development?
29. What would the impact be in CCCR if its capacity building role worked more directly with regional intermediaries to assess the opportunities for social enterprise development in key sectors, for example, in the health, arts and culture, alternative agriculture? Might this analytical work lead to targeting promotion of the workshop more effectively? In sectors "ripe" for social enterprise, might impacts be deepened and accelerated?

## **B. Report on Ontario**

The research framework originally focused on tracking impacts of the project on provincial, regional and community level organizations who became participants. These continue to be tracked, although as indicated, there are ongoing adjustments and revisions both to indicators and to methodologies employed.

### **a) Ontario Provincial Steering Group (PSG)**

- One representative from the Rural Secretariate (RS)
- Four representatives of RDEE Ontario
  - Réseau de développement économique et d'employabilité (RDÉE) Ontario - provincial – training & grants for SE development
  - Réseau de développement économique et d'employabilité (RDÉE) Ontario – East - training & grants for SE development
  - Réseau de développement économique et d'employabilité (RDÉE) Ontario Centre South West - training & grants for SE development

- Réseau de développement économique et d'employabilité (RDÉE) Ontario – North - training & grants for SE development
- One representative of Conseil de la Coopération de l'Ontario (CCO) – training, orientation, coop development, TA evaluation with RDEE & referrals
- One representative representing CALDECH & Economie solidaire de l'Ontario – promotion of SE & SE development
- One representative of Union culturelle des franco-ontariennes (UCFO) – promotion of SE, representing women in SE & networking at Economie solidaire de l'Ontario
- One representative of Conseil économique et social d'Ottawa Carleton (CESOC) – promotion of SE, representing immigrant, & networking at Economie solidaire de l'Ontario
- One representative of the CED Program – Boreal College – teaching CED and SE
- One representative of Société de développement communautaire de Prescott-Russell (Community future)– East of Ontario – training, orientation, SE development, grants and loans & networking
- One representative of CCEDNET, who recently changed jobs and now works at Centre de santé de Sudbury – promotes SE development
- One representative of FEDNOR – funders to the project, grants for SE & CED development
- One representative of Trillium Foundation – funders to the project, grants for SE & CED development,

Note: Another representative from a Community Futures in the North was part of this PSG and decided to withdraw a few months ago.

a) Structuring the Project : Outcomes 1-7

<b>1. Structuring Outcome: PSGs will be collaborators in building a stronger delivery system for Social Enterprise (SE)</b>	
<b>Indicators</b>	<b>Results for 06/07</b>
<ul style="list-style-type: none"> <li>• # of (non-meeting) interactions between provincial and regional members</li> <li>• % of members who attend workshops (or send staff)</li> <li>• % of members who request workshops for their org or others</li> <li>• # of members who insert material or delivery ideas</li> <li>• # of members who start to collect data for the research component</li> </ul>	<ul style="list-style-type: none"> <li>• Over 24 formal, non-PSG meeting interactions involving both PSG members and others (TA Providers, etc.) who CCCR has worked closely with in the promotion &amp; the delivery of their activities.</li> <li>• All RDEE Staff from the North attended a workshop in Sturgeon Falls.</li> <li>• One staff of CCO attended a workshop.</li> <li>• All RDEE Staff from East, development officers &amp; regional directors, had a second training workshop as well as further exposure a few other times during staff meetings.</li> <li>• One staff from RDEE CSO and 2 from the North had working sessions to prepare for delivery.</li> <li>• CESOC request a training session for their staff.</li> <li>• CCO has integrated DW materials into its workshops with people interested in co-ops and their workshops with municipalities.</li> <li>• RDÉE used &amp; adapted material provided by the project.</li> <li>• RDÉE also developed a press release to promote the project and the partner and the funders.</li> <li>• RDEE has been tracking DW related data within their normal data collection system. RDEE from the 3 regions and also CCO are collecting data through the workshops they are delivering.</li> <li>• Other PSG members are aware they need to provide some data for this project, so they are tracking some data through their own organization, institution or department.</li> </ul>
<p>Additional Data: (Source: PSG Notes/ Minutes June &amp; October 31 2006, June 19 2006)</p>	<ul style="list-style-type: none"> <li>• PSG documentation reveals some progress towards creating the foundation for a more coherent SE development system. In addition, there are several innovations by PSG members that indicate ownership of the project: <ul style="list-style-type: none"> <li>o The importance of this project and its integration with organizational mandates was confirmed by PSG members. This understanding was further confirmed RDEE development officers involved in training. For many months in 2006 some of RDEE development officers questioned if SED was part of RDEE's mandate. In December 2006, during a RDEE's staff training and planning session it was confirmed that SE is being integrated into the mandate for the foreseeable future. The provincial Director has confirmed this by email. By September 2007, it should be fully integrated into the Ontario RDEE strategic plan.</li> <li>o There is some evidence that the relationship building between members of the PSG is being facilitated by the project and is</li> </ul> </li> </ul>

	<p>having some impact. The following have been reported:</p> <ul style="list-style-type: none"> <li>o the networking between CESOC &amp; RDEE is more efficient;</li> <li>o CCO &amp; RDEE agreed to collaborate to evaluate TA grant requests in each region</li> <li>o CALDECH has been approached by RDEE CSO to co-facilitate a workshop</li> <li>o Trillium Foundation &amp; FedNor have discussed strategically how they support this project;</li> <li>o CCO &amp; Société de développement communautaire de Prescott-Russell co-facilitate one workshop and it seems they are working closely together to support co-op development.</li> <li>o Trillium adapted the checklists into a screen for evaluating funding applications and as a tool for referrals. This could be a strategic application that will, over time, strengthen the provincial development system by conditioning demand.</li> <li>o There have been some misunderstanding and tensions between CCO and RDEE East. CCO was felt to be excluded; its workshops were not recognized by RDEE east. With CCO action, facilitation of CCCR, involvement of RDEE Director and a new RDEE East director, that problem has now been solved.</li> </ul>
--	--

**Interpretation:**

The investment of considerable time energy to inform, motivate, keep track, and answer specific questions of PSG members and their staff throughout different steps of this project appears to be having some positive impacts. While there was some evidence that relationships between key actors was evolving before the introduction of the DW project, it is clear that the DW project has accelerated this process. The bi-lateral collaboration evident, the integration of SED into the RDEE mandate, the growing collaboration between CCO and RDEE, and the use of the DW by Trillium to design a funding decision making tool, are all indicators that progress towards weaving together a stronger SE development system is underway. *Linkage - #2*

**Data Limitations:** None.

<b>2. Structuring Outcome: Regional Sites will take ownership of the service delivery</b>	
<i>There are three regional sites in Ontario covering the whole Ontario territory.</i>	
<b>Indicators</b>	<b>Results for 06/07</b>
<ul style="list-style-type: none"> <li>• # of workshops delivered</li> </ul>	<ul style="list-style-type: none"> <li>• 10 workshops have been delivered From June 06-May07 by RDEE. Six were in the Centre South (RDEE), 3 in the North and one in East. 4 (2 in North, 1 CSO and 1 in East) of these were training trainers. (193 confirmed participants attended for 8 workshops– data missing for 2 workshops)</li> <li>• 3 workshops were delivered by CCO (numbers pending for 2)</li> <li>• CCO integrated some elements of DW in an other training project for municipalities, number of people exposed on SE to be confirmed.</li> </ul>
<ul style="list-style-type: none"> <li>• scope of sectors &amp; communities engaged</li> </ul>	<ul style="list-style-type: none"> <li>• The predominant sector is non-profits, evenly split between those with charitable status and those without. 25% were from the co-op sector. Most communities were urban adjacent except in the north where rural communities were dominant.</li> </ul>
<ul style="list-style-type: none"> <li>• # of new products or</li> </ul>	<ul style="list-style-type: none"> <li>• CCO used the content developed through this project in other training they are delivering to municipalities &amp; to co-ops.</li> </ul>

<ul style="list-style-type: none"> <li>• adaptations developed</li> <li>• # of requests for specific TA support</li> <li>• # of other providers who become familiar with checklist/use it</li> <li>• funders &amp; decision-makers engaged</li> <li>• Effort to leverage TA funds</li> </ul>	<ul style="list-style-type: none"> <li>• RDEE CSO innovated integrating the training into a CED Strategic planning process, thus moving it from an enterprise focus to a territorial focus</li> <li>• RDEE CSO innovated adapting the content to target specific groups, for example, youth and seniors organizations</li> <li>• Based on the TA report activity from RDEE CSO &amp; RDEE North (expecting RDEE East reports) for the period of September - December 2006 and January – march 2007 Number of clients they are working with for the purpose of SED: RDEE North: 1 RDEE South: first period 51 and second period 13 RDEE East: unknown Only RDEE North specified they received 6 request for TA support for the 1<sup>st</sup> period and 20 more for the 2<sup>nd</sup> period due to the 3 workshops delivered in the North</li> <li>• RDEE North confirmed they received 6 requests for specific TA support. This number increased to 20 by March 2007.</li> <li>• FedNor &amp; Trillium Foundation have been very active on the Provincial Steering committee, promotion, referrals and in Trillium's case, adaptation.</li> <li>• There has been no effort to leverage the FedNor &amp; Trillium Foundation TA funds committed in from 2006 to 2008.</li> </ul>
<ul style="list-style-type: none"> <li>• Additional Data (emails, promotion materials, TA reports, PSG 2006 report)</li> </ul>	<ul style="list-style-type: none"> <li>• To deliver efficiently the DW, RDEE CSO established a partnership with ACFO Niagara to launch 5 workshops in their region.</li> <li>• RDEE North took somewhat longer to actively engage. After designation of 2 people to be in charge of delivering workshops, good progress has been made. They also have established partnerships to help organize and sponsor 2 successful workshops, The Corporation of Economic Development Nord-Aski, the Corporation of Economic Development of Hearst and the Corporation of Economic development of Moonbeam.</li> <li>• RDEE East, after 2 training sessions, many discussions &amp; one meeting, decided to offer a training session through a NGO operating in the region. However, shortly before the workshop it was discovered that what the NGO really wanted was a strategic planning session through which they would confirm (or not) their role in SE. CCCR's regional coordinator facilitated the strategic planning session and 2 RDEE and 2 CCO staff observed the process. It was a success; all members of the NGO and their partners confirmed the importance of SE and decided to pursue further SE training. After the departure of the regional director and the arrival of a new one, it was finally decided than one staff would deliver all workshops. At this present time, 1 independent training delivery by staff in this RDEE region happened before the workshop at Sarsfield. His preparation and delivery were very professional and the workshop very successful.</li> </ul>

**Interpretation:**

Within RDEE, the evidence of “ownership” would appear to vary between the three regions. This is reflected in the number of workshops completed, the partnerships forged for promotion and the level of level of adaptation and integration of the tool into the overall programming of the organization. It remains a question as to why this variation. One factor is likely related to management leadership; the problems that existed in RDEE east in this regard slowed progress considerably. It is also likely that the level of experience in the development officer staff is a factor. It is known that a highly experienced person in the centre-south region was responsible for creative adaptations. Please refer to Attachment One for a fuller elaboration of adaptations. (C'est en Français). Further research would be required to explore the extent to which these conjectures are warranted.

With the recent breakthroughs in RDEE East, it would appear that each of the three regions are positioned to make progress. Based on the current evidence, it is probable that RDEE Central South is best positioned to achieve more advanced results by March 08.

There is some evidence of a higher level of ownership evolving within RDEE by virtue of its inclusion of the DW project in its annual report and on its website. In addition, the reported inclusion of social enterprise in their overall strategic plan indicates a movement from treating the DW as just another project. This will have to be confirmed through the final stage of the research.

CCO took ownership of the service delivery specifically with Co-ops. Their adaptation and integration of materials is well advanced and all indications are that the DW will be used as a tool for CCO's work well beyond the March 2008 conclusion of the DW project.

While not confirmed by the evidence, it is worth posing the question as to whether RDEE has been impacted in its perspective by the changing policy of the Federal government. Being an agency whose primary funding is from the Federal level, the clear message from the Conservative government that the social economy is not on the agenda is not much of an encouragement. Indeed, some concern has been expressed by the national RDEE about the extent of the engagement by RDEE Ontario in social economy arena. RDEE Ontario always defended their decision to be part of the DW project and also to support SED integrated to their capacity building component. The impacts of the broader policy context need to continue to be monitored

**Data Limitations:**

Because the CBO research has not been done, we are not able to understand what has happened with the T.A. requests that have been made of RDEE or what actual progress is being made in provision of T.A, its quality or its impacts. We have not as yet received any information from CCO workshops.

<b>3. Structuring Outcome: Funding will be obtained</b>	
<b>Indicators</b>	<b>Results for 06/07</b>
<ul style="list-style-type: none"> <li>• Project is fully funded</li> <li>• Additional TA dollars are leveraged</li> </ul>	<ul style="list-style-type: none"> <li>• Since July 2006, the project is fully funded as a result of the start-up of Trillium.</li> <li>• There has been no funding beyond Trillium and Fed-Nor sought for TA Funds. Agreements for the use of present funds are in place (CCCR and RDEE)</li> <li>• CCO &amp; RDEE are part of a Consortium promoting the importance to create a SE Trust Fund in Ontario</li> </ul>

**Interpretation:**

Involvement of Trillium Foundation & FedNor actively involved on the Provincial Steering Committee facilitated access to the TA dollars needed. Both funders collaborated in respect of their own mandate & capacity. Thus, unlike B.C. where funding problems have had significant impacts, in Ontario they have not.

**Data Limitations:** None.

<b>4. Structuring Outcome: Workshop materials (including the checklist) and delivery will engage trainers and community orgs in thinking critically about the role of SED in their community.</b>	
<b>Indicators</b>	<b>Results for 06/07</b>
<ul style="list-style-type: none"> <li>• Trainers do their homework &amp; take the learning seriously</li> <li>• Workshop evaluations</li> <li>• SE is a tool that advances their org. mission &amp; goals</li> </ul>	<ul style="list-style-type: none"> <li>• Train the trainer approach was continued in Ontario and offered to a lot more RDEE staff than planned (15 people instead of 2 by region X 3 regions (6 in total) for RDEE &amp; 1 for CCO)</li> <li>• RDEE requested its entire field staff be trained. CCCR adapted to this request and trained all RDEE staff (regional directors and development officers)</li> <li>• Later on, RDEE confirmed that only one person from CSO, one person from East and 2 persons from the North would be involved in the delivery.</li> <li>• One CCO staff trained her colleague after having been trained.</li> <li>• Observing the first delivery or the preparation of CCO &amp; RDEE staff involved, we noticed a lot of preparation, they did their homework, find Se examples from their regions, related the content to some local or regional initiatives, simplify the language in some cases and took the learning very seriously investing a lot of time in the delivery preparation. Those people actively involved understand more Se &amp; SED.</li> <li>• Ontario workshop evaluations since June 06 continue to highlight the usefulness of the checklist as a valuable tool for community organizations.</li> <li>• The whole workbook is highly rated across the board.</li> <li>• 85% of all participants confirmed they intended to use the resources &amp; tools. Finally, 93% of all participants so far found the usefulness of the workshop very high.</li> <li>• The extent to which this is being reflected in the actual SE work will not be known until we conclude the CBO level follow-up interviews. However, given the growing number of TA follow up requests that are forthcoming, it can be inferred that there is some progress being made.</li> </ul>

<ul style="list-style-type: none"> <li>Trainers ID value of material &amp; TA supports</li> </ul>	<ul style="list-style-type: none"> <li>12 of 14 PSG members confirmed that SE is a tool that advances their organisation mission &amp; goals.</li> <li>The pre-set curriculum was a huge value-added for RDEE &amp; CCO. Nothing similar exists in French outside of Quebec.</li> </ul>
<p>Additional Information:  <i>(Source: CBO Follow-Up Fall 06 report, workshop evaluations)</i>  <i>(Survey results of training trainers participants)</i>  <i>Source – Conference March 21, 07, small survey with all RDEE &amp; CCO staff who participated to the training</i></p>	<ul style="list-style-type: none"> <li>CBO follow-up research in the autumn of 2006 indicated that all of the surveyed Ontario workshop participants referred to the workbook or checklist since the workshop. This is almost completely contrary to the results in B.C.</li> <li>After each training the trainer workshop with RDEE, the CCCR coordinator contacted all trainees with a small survey. All RDEE's staff of 12 confirmed the high value they placed on curriculum and the workshop process. They shared their analysis of the positive impacts on workshop participants and the quality of all the materials. The process of training them was viewed as working well and prepared them to deliver the workshops, although a few some felt they needed further coaching for the &amp; preparation for the day long workshop. Perhaps most important in relation to outcome 4, they felt the materials and training was of very real assistance in other aspects of their development role within the francophone community.</li> <li>This was further confirmed in a conference call in early 2007. Four persons from RDEE and one from CCO participated in a call to review the training trainer process to date. They expressed strong appreciation of the training quality and relevance. They also noted the complementarity of the DW training to the other CED offered in 2005-2006 by RDEE Canada. Some noted their strong appreciation of practical utility of the DW and its relevance to their mandate as development officers.</li> </ul>

**Interpretation:**

The workshop evaluations suggest the workshop is engaging, and achieves its intended outcomes. Post-Workshop use of workbook and other materials is strong in Ontario. The training trainer component was generally appreciated by CSO and RDEE staff as relevant. However, it is not completely clear if the investment in so many becoming equipped to deliver the workshop was evident. Data presented in outcome 2 indicates that each RDEE region has now cut back considerably the number of people engaged in this work, in fact, to the number originally forecast in the project proposal. The question remains as to whether the decision to train most development staff was warranted. Some development officers have made it clear that they valued its direct application to their mandate.

While none of the evidence is conclusive, when combined with the adaptation of the tools into other parts of the programming of RDEE and CCO and the integration of its use by RDEE in strategic planning (see outcome 2) it does appear reasonable to infer that that the training has helped RDEE and CCO to more strategically think about both the application of the tool and, more generally, the role of SE in the community contexts they are working.

**Data Limitations:**

The outcome “engaging them in thinking critically about SED in their community” is not well served by the indicators or data available. They measure value for the purpose of organizational assessment. They are weak in measuring the value for thinking more broadly about the role of SED in the community. Having noted the limitations, the inferences cited above do suggest that by referencing data from more than one outcome area, tentative but reasonable conclusions can be drawn.

**5. Structuring Outcome: Workshops will increase profile and regional relationships for Reg. Orgs.**

Indicators	Results for 06/07
<ul style="list-style-type: none"> <li>• Regional organizations have an increased DB of community contacts</li>   <li>• Regional organizations get more requests from community groups</li>   <li>• # of media stories about the project</li>   <li>• # of requests from non-project consultants &amp; orgs to participate in training</li> </ul>	<ul style="list-style-type: none"> <li>• Based on the registration form 58% of the organizations who participated to workshops were known before to RDEE. 42% of the workshop participants represent new contacts. Therefore there has been a modest but positive impact on the RDEE contact data base.</li>   <li>• Based on the PSG Ontario report for 2006, demand for SE TA from community groups, co-ops and NGOs tripled to 33 in 2006 compared with 11 in 2005.</li> <li>• Based on the same report for 2006, we documented 308 referrals for specific training, organisational &amp; business development, TA, aftercare services, funding and access to credit out of the DW project.</li>   <li>• Many RDEE mentioned some regional newspapers promoted different activities (workshops, announcement of Trillium funding, etc). We don't know how many media stories over the project were covered, but we will gather that information in the next few weeks.</li> <li>• In RDEE CSO, the promotion was sent out to media as well as community organizations. There was media coverage for two workshops provided by the coordinator. Each yielded front page coverage in a regional newspaper with pictures).</li> <li>• RDEE, in collaboration with CCCR, coordinated a press conference to promote Trillium Foundation's investment in the project.</li> <li>• The Regional director of RDEE also did an interview with CBC in Sudbury to introduce SE and to promote the 2 first workshops in the North.</li> <li>• Economie solidaire de l'Ontario promoted the project extensively through their newsletters sent out to 1000 people &amp; organizations in francophone Ontario.</li> <li>• Requests from two urban areas led to additional workshops being delivered</li> </ul>

**Interpretation:**

RDEE & CCO have reported specific impacts in terms of visibility. Even though the RDEE & CCO are well organized to reach their members or organizations & partners in Ontario, there is a reasonable basis to suggest their base has expanded through the project. RDEE has definitely had its profile raised in terms of SED. It has also raised the profile with potentially long term partners. For example, in Hearst & Kapuskasing, when rural communities are facing major challenges, RDEE joined efforts with 3 Community Futures to promote & deliver workshops. The large number of referrals identified in the second round of research is impressive. However, it is not at all clear if they were "successful" referrals. If nothing else they indicate heightened awareness and activity level.s

**Data Limitations:**

We are missing data from RDEE & CCO workshops at time of writing

<b>6. Structuring Outcome: The information collected through the research component will inform our understanding of issues &amp; opportunities</b>	
<b>Indicators</b>	<b>Results for 06/07</b>
<ul style="list-style-type: none"> <li>• PSG input</li>   <li>• Extent to which the project adapts as we gather new information.</li>   <li>• # of initiatives to which members attribute project participation or information as a contributing factor</li>   <li>• types of initiatives</li> </ul>	<ul style="list-style-type: none"> <li>• The increased awareness and knowledge evident in the Provincial/Regional research report indicates very modest progress in identifying some of the issues that require some attention going forward. While the basis for a francophone SE development system has advanced, it is not yet "in place".</li> <li>• Half of the PSG members confirmed that the project has an impact on their relations with other organizations, with partners</li> <li>• RDEE have identified the next step questionnaire is missing something to help them to track efficiently the TA need of potential applicants.</li>   <li>• It is not evident that the research to date has had major impacts in Ontario, quite in contrast to B.C. This is likely to change in the next stage of the project when the provincial steering group meets in late June. The latest P&amp;R report and this report will facilitate a more systematic consideration of what is being learned.</li>   <li>• Twelve initiatives have been identified. However, almost all of them to date have been a result of learning related to the tool, the workshop and the PSG. The research program, per se, has not been the key contributor. This may change in the next phase.</li>   <li>• Types of Initiatives : SE development, assessment, partnership, co-facilitation, observation, CCO: <ul style="list-style-type: none"> <li>• the CCO have taken the materials &amp; applied them in their work</li> <li>• the integrated an overview in their training they were providing to municipalities</li> </ul> Community futures: <ul style="list-style-type: none"> <li>• CCCR provided a short workshop for some Community futures at their annual meeting</li> </ul> CCO &amp; Société de développement communautaire de Prescott-Russell <ul style="list-style-type: none"> <li>• they work closer together, they also co-facilitate one workshop</li> </ul> CCO &amp; RDÉE <ul style="list-style-type: none"> <li>• RDEE observed one workshop delivered by CCO</li> <li>• RDEE &amp; CCO agreed to work closely with each other to evaluate TA requests</li> </ul> CESOC <ul style="list-style-type: none"> <li>• CESOC wanted all its staff trained for their own work and may be some new development for CESOC itself</li> </ul> Trillium Foundation <ul style="list-style-type: none"> <li>• Trillium is using the DW as a tool for their own</li> </ul> </li> </ul>

	<p>assessment of grants RDÉE &amp; FedNor</p> <ul style="list-style-type: none"> <li>• Discussed to invite FEDNOR staff to some workshop in the North (raise awareness about SE)</li> <li>• FedNor participated to the workshop at Sturgeon Falls</li> </ul>
<p>*Additional Information: (Source, P&amp;R Second Report Ontario 2006)</p>	<ul style="list-style-type: none"> <li>• For a number of the initiatives listed above, PSG members confirmed the importance and the impact of the project on their own organization. They also agreed that the information and discussions were pushing them to get clearer about SE development factors and to consider the possible impact on their roles:</li> </ul> <p>“Les informations que nous avons reçues par le biais de ce projet nous aident dans le cadre de notre mandat. Nous pouvons réellement affirmer que nos connaissances en SED ont accru durant cette année. Maintenant je comprends mieux les rôles des membres en développement de SE. J’ai participé, je fais de la recherche et je m’informe car c’est maintenant dans notre contrat et cela fait partie de notre mandat d’appuyer le développement d’ES. »</p>

**Interpretation:**

The research component has not thus far contributed significantly to the definition of issues and opportunities, at least not directly. The training, the PSG and the materials have been the source of much of the learning and capacity building to date and the context out of which issues and opportunities have emerged. The loss of two months in the September 05 to March 06 period, when combined with the summer period, converged to delay the overall process in Ontario by about 4 or 5 months. In addition, the insistence of RDEE to train all staff slowed implementation to some extent. These factors may have reduced the impact of the research component in Ontario, at least thus far. However, this may change significantly in the next period as the PSG engages in its 3<sup>rd</sup> meeting (June), where results of this report can be discussed. The CBO research finally getting into full swing will also help.

**Data Limitations:**

Definition of “initiatives” would help to track down specific activities related to that element.

<b>7. Structuring Outcome: Communications activities will increase awareness and understanding of SE</b>	
<b>Indicators</b>	<b>Results for 06/07:</b>
<ul style="list-style-type: none"> <li>• # of requests for newsletter from non-project orgs &amp; individuals</li> <li>• # of downloads of materials</li> <li>• # of requests for workshops in non-project areas</li> </ul>	<ul style="list-style-type: none"> <li>• Tracking of the newsletter downloads unfortunately has not distinguished non-project entities. We know that downloads of the newsletter in French are close to 1000 and for English, about 800.</li> <li>• 209 English (38 from Ontario) &amp; 15 French (8 from Ontario) free download of Building Community Wealth</li> <li>• 2 requests from an urban context</li> <li>• RDEE &amp; CCO staff, from all regions, asked many times if they could, with this project deliver workshops in urban context.</li> <li>• 3 request for workshop in English in Ontario</li> </ul>

**Interpretation:**

Communications activity have yielded only a small amount of activity on the web-site. Why the variation between English and French access of different materials is not able to be determined. With respect to project requests, the fact that this project is targeting rural francophone communities and that it has the potential for province wide coverage given RDEE's structure, limits its reach. The new request from urban communities and from Anglophone communities reveal an interest and perhaps need for SED capacity building elsewhere Ontario.

**Data Limitations:**

It could be that the newsletter and or downloaded materials are having impacts. However, we have not tried as of yet to assess this. This can be assessed with the workbooks because people have to register to download.

**c) Provincial and Regional Organizations: Outcomes 8 & 9**

<b>8. Provincial/Regional Org. Outcome: Increased Awareness of and Commitment to SE</b>	
<b>Indicators</b>	<b>Results for 2006/07</b>
<ul style="list-style-type: none"> <li>Levels of board, staff and member awareness and commitment</li> <li>Extent organization is active in SE development</li> <li>Extent that SE is relevant to achieving org. mission</li> <li>Existence of a strategy to focus resources and effort on SED</li> </ul>	<ul style="list-style-type: none"> <li>PSG members reported that board awareness slightly increased from 3/5 in 2005 to 3.4/5 in 2006. This was attributed to the DW project.</li> <li>PSG members reported that staff awareness increased from 3.5/5 in 2005 to 4/5 in 2006.</li> <li>PSG members mentioned how difficult it was for them to evaluate their member awareness but went on to rate it much higher in 2006 3.4/5 that the 1.5/5 in 2005.</li> <li>Members emphasized that the project has elevated their own awareness &amp; understanding and that of their staff, particularly managers and staff involved in training delivery.</li> <li>PSG members are more active in their SE development activities. Level of activity has increased from 3 to 3.8/5.</li> <li>The mission relevance of SE remained stable at 4.2 /5.</li> <li>12 of 14 PSG members had a strategy for SED in 2006 compared of 5 of 11 in 2005</li> </ul>
<p>Additional information from PSG interviews (<i>Source: DW Project Provincial/Regional Report for 2006, Feb. 2007</i>)</p>	<ul style="list-style-type: none"> <li>One CFDC from the North formally withdrew from the project without ever having participated in any activities. Some comments drawn from PSG documentation record:  <div style="background-color: #1a3d4d; color: white; padding: 10px;"> <p>“Most of the change, increase of awareness, is due to all the information provided by CCCR: newsletters, workbook, website, etc. During our strategic planning process and staff meetings we integrated the DW. During our AGM and through our communication tools we communicate much more information about SE to our members. Our members understand more the context that drives SED and SED itself. We are more convinced more than ever we will try to create our own SE to generate other kinds of revenue and also increase our autonomy. ”</p> </div> </li> </ul>

**Interpretation:**

The project has had a notable impact on the awareness, active commitment and organizational strategies of PSG members. It may be that the availability in French of training, information & practical tools is an important factor in explaining the significant impact of the DW in the francophone context. There simply aren't many French language tools available outside of Quebec adapted to the minority context. It might also be an impact of the scope of early training (15 staff trained), compared to BC, where 1 staff in each site were the primary beneficiaries and delivery people.

**Data Limitations:** None

<b>9. Provincial/Regional Org. Outcome: Increased Capacity for SED direct service delivery, referrals, screening, awareness &amp; use of resources, and extent and nature of relationships</b>	
<b>Indicators</b>	<b>Results for 2006</b>
<ul style="list-style-type: none"> <li>• Extent to which organization actively promotes SE</li> </ul>	<ul style="list-style-type: none"> <li>• Regarding " increased capacity for SED direct service delivery, referrals, screening, awareness &amp; use of resources and extend nature of relationships", 12 of 14 PSG members confirmed they were actively involved offering SED direct services of various kinds (RDEE East, RDEE North, RDEE CSO, RDEE provincial, CCO, CCEDNET(regional coordinator in Ontario), CESOC, Société de développement communautaire de Prescott-Russell, CALDECH, Trillium Foundation, FedNor, UCFO)</li> <li>• RDEE and CCO, both directly involved in promotion and delivery are employing in-person, print and electronic mediums to promote SE</li> <li>• All PSG members asked to receive information about date and location of workshops to distribute this information in their specific networks.</li> </ul>
<ul style="list-style-type: none"> <li>• # of new SEs worked with in last year</li> </ul>	<ul style="list-style-type: none"> <li>• Based on the PSG reports, the members confirmed than 14 new SE clients were reported for 2006 year.</li> </ul>
<ul style="list-style-type: none"> <li>• # of expanded SEs worked with in last year</li> </ul>	<ul style="list-style-type: none"> <li>• Based on the same report, 23 expanded SE, (increased their capacity or got stronger).</li> </ul>
<ul style="list-style-type: none"> <li>• # of training sessions on SE in last year</li> </ul>	<ul style="list-style-type: none"> <li>• 5 organizations report 60 training &amp; information sessions during 2006 ( 2 sessions did not track the number of participants</li> </ul>
<ul style="list-style-type: none"> <li>• # of participants in training sessions in last year</li> </ul>	<ul style="list-style-type: none"> <li>• 1128 people (approximate) attended these sessions; this is up from 300 reported in 2005; Of these about 200 people were involved in the DW workshops.</li> </ul>
<ul style="list-style-type: none"> <li>• # of SE clients for organizational dev. TA in last year</li> </ul>	<ul style="list-style-type: none"> <li>• 4 organizations reported and increase in the number of clients from 56 (2005) to 86 (2006)</li> </ul>
<ul style="list-style-type: none"> <li>• # of SE clients for business development TA in last year</li> </ul>	<ul style="list-style-type: none"> <li>• 5 organizations reported an increase from 66 (2005) to 72 clients 2006. (44 were identified as being due to DW project)</li> </ul>
<ul style="list-style-type: none"> <li>• # of SE clients for after-care TA in last year</li> </ul>	<ul style="list-style-type: none"> <li>• 5 organizations reported 33 clients instead of 11 in 2005 with the focus of after care services</li> </ul>

<ul style="list-style-type: none"> <li>• # of SE clients referred for TA in last year</li> <li>• # of SE clients referred for loans/grants in last year</li> <li>• # of SE loans/grants made in last year</li> </ul>	<ul style="list-style-type: none"> <li>• 5 organizations confirmed making 672 TA referrals. 308 had some relationship to the DW project: 149 clients for training &amp; information (106 related to DW) 81 clients for organizational development (42 related to DW) 118 for business development (80 related to DW), 36 clients for after care services (all of them related to DW) 283 clients for grants (39 related to DW) and 5 client for funding, access to credit</li> <li>• 283 clients were referred for grants but 39 of them were related to the DW.</li> <li>• 5 clients were referred for loan or credit.</li> <li>• 2 organisations provided loans or grants in the reporting period: RDEE Ontario and the Société de développement communautaire de Prescott-Russell</li> <li>• The Société de développement communautaire de Prescott-Russell (Community future)– East of Ontario confirmed the provided 8 loans to SE projects and they estimates 5 of them were related to DW. Also the provided additional grants to 6 SE projects and 5 of them related to DW.</li> <li>• RDEE Ontario: RDEE CSO offered grants to 4 groups and all of them were related to DW (planning process, etc.) RDEE North offered grants to 12 groups and 3 of them were related to DW (planning process, etc.)</li> </ul> <p>Other PSG members contributed :</p> <ul style="list-style-type: none"> <li>• Trillium Foundation could not confirm any numbers regarding SE grants, but in their financial program to enhance economic, they invested 9.1 M\$ in 2006 (CED, SE, literacy, employability, mentorship, etc.) They said it is too early to relate any of those grants to the DW yet, but it is believe that some are.</li> <li>• FedNor note a number of SE projects they provided but emphasized the role of CFDCs throughout the province who are offering grants &amp; loans. This has been integrated into their mandate for the last 2 years (to support SE).</li> <li>• CCO confirmed they don't provide grants anymore, but they are investing in study tours, training sessions, sharing of knowledge, etc.</li> </ul>
<ul style="list-style-type: none"> <li>• Existence of a screening tool to assess readiness</li> </ul>	<ul style="list-style-type: none"> <li>• Compared to 2 organizations last year, this year 7 organizations reported using a screening tool. Two use the DW tool for this purpose; two others report they are working on adapting the DW.</li> </ul>
<ul style="list-style-type: none"> <li>• Effectiveness of screening tool</li> </ul>	<ul style="list-style-type: none"> <li>• The effectiveness of screening tool increase during the last year, 2005 3/5 and 2006 4/5.</li> </ul>
<ul style="list-style-type: none"> <li>• Level of awareness of resources for SE</li> </ul>	<ul style="list-style-type: none"> <li>• Awareness of SE resource: 3.7/5 in 2006 compared to 3/5 in 2005.</li> </ul>

<ul style="list-style-type: none"> <li>• Level of availability and accessibility of TA services</li> <li>• Level of availability and accessibility of credit</li> <li>• Level of business / non-profit partnerships for SE</li> <li>• Extent to which organization is involved in influencing the policy context</li> <li>• Nature and significance of local, provincial and federal level relationships</li> <li>• for purpose of SE</li> </ul>	<ul style="list-style-type: none"> <li>• Level of availability &amp; accessibility of TA services: 3/5 in 2006 compared to 2/5.</li> <li>• This rating stayed the same for 2006 (2/5)</li> <li>• No data</li> <li>• Committee members rate very low in policy engagement</li> <li>• Only 1 organization, CCO confirmed influencing policy in 2006 (5 on 5).</li> <li>• No data</li> </ul>
--	---

**Interpretation:**

The project appears to be generating additional referrals and demands for various types of technical assistance. 5 PSG organizations are actively involved in training, 4 mainly in SED (RDEE, CCO, SDCPR – provincial & CESOC & CALDECH - regional). Referral services were better documented by more PSG members this year. Some of them also did some follow up to track down the impact of the reference that's why some were able to confirm the funding received by SE

In Francophone Ontario, it appears that the DW has had a significant impact on improving capacity for SED direct service delivery, referrals, screening, awareness & use of resources, and extent and nature of relationships.

**Data Limitations:**

No data available to document level of business / non-profit partnerships for SE. It is the view of CCCR that there needs to be some cross-verification of this data. In particular, if the level of activity reported is accurate, there is much more to be learned about what impacts are being realized, for example, through 350+ referrals. The CBO research should help us better understand some impacts. See Attachment # 2 for Matrix of data related to this section.

## d) Community Based Organizations: Outcomes 10-13

10. Community Based Org. Outcome: We understand the reach of the project in terms of types, mandates and goals of organizations engaging in SE Development.	
Indicators	Results to date: N = 130 participants
<ul style="list-style-type: none"> <li>Legal structure of org.</li> </ul>	<ul style="list-style-type: none"> <li>Based of the registration on line for workshops: 189 entries (data is missing from two workshops)               <ul style="list-style-type: none"> <li>64% are members of different organizations</li> <li>17% are members of a group</li> <li>7% are individuals</li> </ul> </li> <li>Total 88% of workshop participants responded to this question</li> <li>Only 51% of the participants specified their legal structure:               <ul style="list-style-type: none"> <li>2% for profit co-op</li> <li>20% non profit co-op</li> <li>3 % Charity co-op</li> <li>24 % Non profit &amp; charitable NGO</li> <li>2 % small business</li> </ul> </li> </ul>
<ul style="list-style-type: none"> <li>Revenue sources of org.</li> </ul>	<ul style="list-style-type: none"> <li>Revenue sources in rank order are: Gov. grants, other fund raising, sale of goods &amp; services &amp; Contracted services for 4th.</li> </ul>
<ul style="list-style-type: none"> <li>Sectors of focus</li> </ul>	<ul style="list-style-type: none"> <li>22% identify with social support services, 18% employment services, 17% art &amp; culture &amp; 16% recreational services and 15% tourism.</li> </ul>
<ul style="list-style-type: none"> <li>Populations of focus</li> </ul>	<ul style="list-style-type: none"> <li>Most identified with "francophone" (51%) but target populations mentioned most often include youth (33%), Women(29%), community at large (28%), Youth/Children/Families &amp; Seniors (25%).</li> <li>33% identified clients who were on welfare or unemployed as a primary target group.</li> </ul>
<ul style="list-style-type: none"> <li>Purpose for SED</li> </ul>	<ul style="list-style-type: none"> <li>No data on this.</li> </ul>
<ul style="list-style-type: none"> <li>Current SE focus/results</li> </ul>	<ul style="list-style-type: none"> <li>38% exploring, 8% considering SE as an activity, 6% engaged developing a SE, 11% already own an enterprise</li> </ul>

### Interpretation:

In Ontario the non-profit sector has been the primary audience for workshops with co-ops a secondary audience (25%) The top sectors are social services, employment services, arts and culture and recreational services. Tourism is the only "traditional" economic sector reasonably well represented. Most attending are at very early "exploring" stages. Which ones are making progress and why and what are the implications of this for the focus of intermediary organizations in the future is a question that awaits the CBO research.

### Data Limitations:

The data only tells us about those who are registering for workshops, rather than all those who are "engaging in SE Development". Also some information is missing in the data base regarding 3 workshops. It is also not clear why, for example, we would have 25% co-ops and only 11% indicating they already own a social enterprise – unless some co-ops did not see themselves as social enterprises? This could be representative of the confusion that exists in terminology: co-op, social enterprise, sector versus population, etc. The percentages run over 100% in some cases where respondents were asked to check "all that apply". Some respondents skipped questions as well so data may be slightly skewed.

<b>11. Community Based Org. Outcome: Increased awareness of SE &amp; Resources</b>	
<b>Indicators</b>	<b>Results to date: May 07</b>
<ul style="list-style-type: none"> <li>• Prior awareness of Reg. Org.</li> <li>• Level of interest in SE pre-workshop</li> <li>• Level of interest in SE post workshop</li> <li>• <b>Understanding of SE post workshop</b></li> <li>• Usefulness of workshop activities &amp; resources</li> <li>• Use of resources post workshop</li> <li>• Additional resources required</li> <li>• Appropriate use of Reg. Org. post workshop <i>(Preliminary results from Fall 2006, evaluation form, Follow-Up Survey)</i></li> </ul>	<ul style="list-style-type: none"> <li>• Of all those who registered for workshops in Ontario (except 3 workshops for which data is not yet available), 17% had never heard of the host organization, 22% had high awareness of the organization, and 39% were in the middle – had heard of them but didn't know much about them.</li> <li>• Only 63% of workshop participants answered the question regarding their level of interest prior of workshops: 38% exploring (72 people) , 8% considering SE as an activity (16 people), 6% engaged developing a SE (12people), 11% already own an enterprise (20 people) (Total of 120 people of 189 representing 63% of participants)</li> <li>• Average interest rating post workshop the level of interest was 85 % in the high and very high categories</li> <li>• <b>No data</b></li> <li>• 91% evaluate to high &amp; very high the usefulness of workshop (activities &amp; resources)</li> <li>• Use of resources post workshop appears high from early stage research. The following are identified: check list, entrepreneurial evaluation (individual and group), venture selection process, the whole workbook, the development officer of the regional organisation, the grid presenting the 4 phases, email address of a resource person, a summary of the workbook, thinking process all the way through the workbook,</li> <li>• Additional resources required: more SE examples from specific region, more discussion with the coordinator of this project, meeting with potential funders, list of funding opportunities, toolkits, a practical exercise through all the phases with a model example of SE, an information session with our board, follow up support by emails &amp; phone, best practices, resource persons to answer specific question on the workbook, workshop on CED, coaching, more web sites resources, tailored technical assistance, more workshops every year, SE learning circles, etc.</li> <li>• The CBO Fall 2006 survey (N=7) suggested that 71% of those interviewed were clear about the role of the regional organization (RDEE) and how it could help them.</li> </ul>

**Interpretation:**

Visibility of RDEE has been increased. The usefulness of workshop activities & resources has been strongly confirmed as has the need for additional information & resources in French.

**Data Limitations:**

No data to document understanding of SE post workshop. This will change as CBO research is completed. We did not receive all the evaluation forms regarding all workshops delivered to date.

<b>12. Community Based Org. Outcome: Assessment of Readiness and Identification (ID) of Priority Tasks</b>	
<b>Indicators</b>	<b>Results to date: May 07</b>
<ul style="list-style-type: none"> <li>• ID readiness for SED &amp; impact of workshop</li> <li>• Why or why not</li> <li>• All tasks over next year</li> <li>• Priority tasks</li> <li>• ID of tasks that require outside assistance</li> <li>• Types of tasks that require assistance</li> </ul>	<ul style="list-style-type: none"> <li>• 100% of workshop participants to date have agreed that the workshop helped them assess their readiness. However, some noted the need to go back to their organizations and get others to support their conclusion. Some participants identified needing additional presentations to their organizations. It was recommended several times that having key decision-makers attend would make the workshop even more effective.</li> <li>• In most cases, those who have said they would NOT proceed with SED at the end of the workshop identified lack of organizational stability or capacity as the key reason; a few decided NO because they realize SE is not what they thought it was.</li> <li>• The Next Steps Questionnaire is the primary tool used to document the decisions. It is based on the SE Checklist. It has been through several revisions, but there continue to be concerns about it's usefulness:               <ul style="list-style-type: none"> <li>o It DOES serve as a means for workshop participants to assess their readiness and/or what steps they may have missed if they have a SE operating already.</li> <li>o The degree to which the specific next step priorities are accurate is not clear: some participants check every task as a priority; some cannot be sure since they need to do more detailed planning within their organization.</li> <li>o Participants leave their copy of the Next Steps with CCCR, so they do not take it back as a source of further refinement/discussion.</li> <li>o The follow-up with workshop participants who have completed a Next Steps that is beginning now through January 2008 should help us understand more about this.</li> </ul> </li> <li>• Based on the CBO interviews of 7 organizations in the autumn of 2007, the next immediate tasks named were: organizing meeting with all partners &amp; potential partners (2), revising the information from the DW and sharing the learning with people in their group; completing a restructuring, exploring different ways to generate revenues and finally finding additional financial &amp; human resources and appropriate TA.</li> <li>• From the same survey, special expertise in agrifood, and skills to build strong &amp; efficient partnership for SE (with</li> </ul>

<ul style="list-style-type: none"> <li>ID of who can provide that assistance</li> </ul>	<p>private businesses, governments, foundations, etc),</p> <ul style="list-style-type: none"> <li>Social Capital Partners, RDEE, CCO, private consultants, Christina Foundation, CEDTAP, L'Art du développement.</li> </ul>
<ul style="list-style-type: none"> <li>Additional Information: (Source: CBO Fall 2006 Summary Report)</li> </ul>	<ul style="list-style-type: none"> <li>7 CBO's in Ontario were interviewed 6 months after attending a workshop.</li> <li>All 7 organizations met and/or developed applications or proposals shortly after the workshop that they hope will allow them to proceed with their SE work. Several mention working to get board and staff support, working with RDEE, developing action plans as the types of activities they had completed.</li> <li>All 7 organizations rated the impact of the workshop very high – that it contributed the steps, new ways of thinking and doing things, and the motivation to go forward.</li> <li>2 organizations identified many sources of assistance (including RDEE) while others suggested it is not that easy to find human or fiscal resources for SE.</li> <li>Only 1 organization thought they would have the resources to proceed with their plans.</li> </ul>

**Interpretation:**

Despite problems with the next steps questionnaire it appears that the workshop and DW tool together do help people focus their priority task for moving forward. The next phase of research should assist in getting a much better understanding of the DW's use in advancing readiness and good priority setting. As to the profile of demand for TA the research results to date yield little basis for improving our understanding. This should improve as the CBO research advances.

**Data Limitations:**

The accuracy or reliability of information from the Next Steps Questionnaire continues to be problematic.

<b>13. Community Based Org. Outcome: Completion of tasks required related to Organizational Development, Enterprise Development, Community Participation and Strategic Networking and Use of Technical Assistance</b>	
<b>Indicators</b>	<b>Results to date:</b>
<ul style="list-style-type: none"> <li>Which tasks (from 1<sup>st</sup> questionnaire) were completed</li> <li>Which tasks were not</li> <li>Use of tool</li> <li>Problems that prevented task completion</li> <li>Nature of tasks requiring assistance</li> <li>Use &amp; impact of Reg. Org.</li> <li>Access to other TA providers</li> <li>Access to grants</li> <li>Access to financing</li> <li>Scope of relationships &amp; networks compared to baseline</li> <li>Degree of impact of project/tool on above</li> <li>Overall impact on organization</li> </ul>	<ul style="list-style-type: none"> <li>The CBO follow-up asks all of these questions and will be reported on in the final report. This research component has been seriously delayed. Aside from problems already identified, data base problems have also been difficult at times to sort out.</li> </ul>

### **III. Conclusions for ONTARIO**

#### **Summary of Key Impacts to date:**

8. The project has had a significant impact on the 12 organizations and associations that make up the provincial steering group in Ontario. On every indicator it is clear that the level of awareness (board and staff), activity levels and integration of SE as a strategy into organization life has increased substantially in the last year.
9. While there was some evidence that relationships between key actors was evolving before the introduction of the DW project, it is clear that the DW project has accelerated this process. The bi-lateral collaboration evident, the integration of SED into the RDEE mandate, the growing collaboration between CCO and RDEE, and the use of the DW by Trillium to design a funding decision making tool, are all indicators that progress towards weaving together a stronger SE development system is underway. The DW project has created both the space (the PSG table) and the supports to enable organizations to think, to network and for some of them, to plan together in SED.
10. RDEE (East, CSO & North) & CCO organizations have benefited most directly from the project in terms of additional capacity. They have enhanced their training and project development capacity in the social enterprise field and increased their visibility, particularly RDEE. Both organizations have adapted the design and applications of the tool to address varied contexts and opportunities. It appears that the prospects are good for the DW to be integrated into the mandates and services of each organization.
11. Trillium Foundation's adaptation of the tool as a screen for grant decision making is beginning to shape their relationship with organizations making funding requests. Demand is slowly becoming sensitive to the questions and demands emanating from the DW framework.
12. There is an increase in demand for TA services as a result of the project.
13. The workshop is a successful means of introducing SE and helping CBO's assess their readiness. Workshop materials are highly valued and are used as an ongoing resource after the workshop.
14. Services organizations (employment, social and recreational services), arts and culture organizations and tourism have been the main sectors drawn to the workshops and a majority are at an early stage of exploration.

#### **Summary of Key Lessons to date:**

19. The process of planning, applying, assessing, learning, training, re-training, informing, re-informing, sending materials, re-sending materials, re-planning, applying again, etc. was not fully anticipated in the research design and thus we have no indicators that speak this process and its related impacts, positive and negative.
20. The time spent in training & informing regional trainers (12 for RDEE + 1 for CCO – who trained her colleague plus 3 regional RDEE directors) for the workshop was not warranted and took a lot more time than planned.
21. Between training and having the capacity to appropriate the content and be able to deliver it, more time than anticipated was required. This may explain the time needed by RDEE to

assess who could and could not deliver and also their readiness (or not) to provide efficient TA.

22. CBO's do not establish SE's quickly. The gestation period is long.
23. This project reveals the importance of having effective resources for SED in French for francophones in a minority context. The request for a lot more resources (additional information on Ontario SE, list of funders & potential funders, meetings with funders, specific resources for each an everyone major task of organizational & business development & community mobilization had been confirmed by almost all workshops participants.
24. SED is emerging as an important strategy within community development, and may have a particular relevance for particular segments of the community (Seniors, women, immigrants, youth).

### **Outstanding Questions:**

25. Within RDEE, the evidence of "ownership" would appear to vary between the three regions. This is reflected in the number of workshops completed, the partnerships forged from promotion and the level of level of adaptation and integration of the tool into the overall programming of the organization. It remains a question as to why this variation. To what extent is it the attitude and experience of management and key development staff that explains the varied performance among regional intermediaries?
26. To what extent is there variation in the results being achieved between RDEE and CCO? This may or may not be a fruitful question. It is raised because of the different starting points of each organization; CCO is dedicated to one format or SE development whereas for RDEE, it is but one sphere in a larger array of services it provides. How to determine clues to answering this question has not been thought through.
27. Has the change in Federal Policy on the social economy affected RDEE delivery and if so, in what ways?
28. Why have the workshop materials and related tools been used much more extensively in francophone Ontario than they have in British Columbia?
29. What are the other factors that foster CBO success in SE development and how can we better assess readiness and/or focus our limited resources where there might be greater impacts?

## Attachment One: Development Officers Perspective on the Use of and Adaptation of the Development Wheel

**Entrevue avec Leo Audette**  
**RDEE CSO**

**Dans le cadre du projet de la Roue du développement, vous nous avez partagé à plusieurs reprises vos impressions concernant ce projet et des outils proposés, pouvez-vous nous partager vos impressions générales :**

En général le processus proposé par la Roue est formidable et complet. Une fois que tu commences à comprendre le rouage et le processus, il y a très peu que tu peux manquer. Mais cela demande de bien se préparer pour bien comprendre tous les aspects du projet. À chaque fois que j'ai l'occasion de parler de la Roue du développement, j'essaie d'expliquer aux gens que ce projet les mettra dans les meilleures positions possibles pour répondre à leurs questions concernant le développement de leur projet et aussi les questions des bailleurs de fonds.

La Roue du développement en plus donne aussi une bonne impression sur le processus continue et de suivi nécessaire et, si le groupe a des vrais partenaires, cela permet de répondre clairement à leurs questions : ont-ils besoin d'information additionnelle, de formation, sont-ils réellement rendus à l'étude de faisabilité etc.. La Roue permet de bien se préparer, de se poser les bonnes questions et surtout de bien comprendre pourquoi les réponses obtenues avant de choisir de passer à l'action.

Je me rends aussi compte que les bailleurs de fonds posent ces mêmes questions à tous les promoteurs de projets que la documentation et le processus proposés par la Roue du développement permettent de bien se préparer et d'y répondre avant même qu'elles soient posées. Donc la Roue du développement est très importante pour les bailleurs de fonds et les groupes promoteurs. Toute l'information qui est confirmée dans le cadre de la Roue du développement, aide à bien documenter le processus respectif de chaque organisation et de leur donner l'heure juste sur leur développement.

---

**Votre expérience dans la livraison : les leçons apprises, les réactions des participant.es, la confirmation ou non de la pertinence ou non du contenu et des outils, etc.**

Je pense que dans chacune des présentations que j'ai faite je l'ai adaptée pour mieux rejoindre mon groupe cible, une communauté particulière, un groupe de jeunes, d'ainé.es, etc. Oui dans le cadre des ateliers, nous parlions des entreprises sociales mais à cause de la clientèle rejointe, nous avons ajouté la dimension du développement de projets communautaires et de projets-processus en développement économique communautaire. À ce moment-là, cette adaptation a porté fruit, la réaction des participantes et participants a été très intéressante.

Pour les aînés, lire le guide ce n'est pas évident car ils ne peuvent pas lire autant de contenu ou aussi rapidement que cela est nécessaire pour faire les exercices durant l'atelier. Mais pour eux, il est important de valoriser leur expérience, leurs compétences, leur vécu et en plus, ils ne veulent pas vraiment assumer l'action mais pourraient s'impliquer dans des projets communautaires mieux informés. Donc dans le cadre de ce processus, on les reconnaît comme

les sages. En utilisant la théorie de la roue et les utilisant comme les sages, ils sont valorisés, ils peuvent contribuer mais ce ne sont pas eux qui font le travail mais ils peuvent inspirer.

Dans la grande région du Niagara, intégrant la Roue du développement dans un processus plus global de développement économique communautaire, plus de 107 personnes sont impliqués en développement d'entreprises sociales, de projets communautaires ou d'autres initiatives prioritaires pour la communauté.

Voici des exemples de projets concrets qui prennent forme :

#### Entreprises sociales en développement

Centre régional francophone

Festival international St Jean Baptiste

Initiative en transport

Initiative artistique – musique et théâtre

Initiative en commercialisation de produits francophones – tourisme et agrotourisme

Après un processus de développement économique communautaire de planification régional, en offrant l'atelier de la roue à tous les promoteurs et promotrices des initiatives potentielles, les gens sont mieux équipés et la concertation régionale est beaucoup plus efficace.

Notons que d'autres initiatives telles que la mise en place d'un Comité d'action politique d'accès au transport, projet de sélection de troupes musicales et de théâtre, projet d'empowerment pour les élèves du secondaire, campagne de représentation et comité sectoriel pour les aînés, projet de curriculum équitable pour les francophones, campagne de sensibilisation des employeurs et projets de soirées jeunesse et familiales ont été aussi identifiées.

#### **Concernant votre capacité d'adaptation du programme, pouvez-vous nous préciser davantage votre approche et nous partager les leçons apprises :**

Leçons apprises :

J'ai appris tellement dans le cadre de ce projet, ce fut une expérience enrichissante. Le processus m'a permis de bien comprendre les différents rôles des bailleurs de fonds, des gens et des organisations de la communauté qu'ils peuvent jouer pour favoriser le développement des communautés.

Le rôle des bailleurs de fonds n'est pas de dire NON aux groupes et organismes qui ont de bonnes idées de développement mais de bien distribuer les fonds publics. Les groupes communautaires doivent bien se préparer pour mobiliser ces partenaires financiers. Maintenant avec cet outil c'est possible. Je vois très clairement tout cela. Si les gens font bien leur devoir, les partenaires financiers ne pourront pas dire NON.

D'ailleurs j'ai aussi adapté la présentation aux jeunes... car oui ils peuvent être intéressés à s'embarquer dans divers projets pour eux ou dans la communauté mais ils ne seront pas porteurs, leaders de ces projets sauf pour le projet d'empowerment pour les jeunes du secondaire. Mais le processus a permis à ces jeunes de découvrir leur pouvoir d'agir dans leur milieu au sein de leur communauté et de préciser le rôle qu'ils peuvent jouer dans chacun des projets.

#### **Pouvez-vous nous partager certains commentaires des participant.es à vos ateliers qui vous ont impressionnés :**

Suzanne Morin entreprise Niagara... elle s'embarquait dans un processus sans savoir ou cela l'amènerait... mais elle a confirmé que le processus était logique, simple et qui mène à une prise de décision.

Mon frère : J'en ai appris plus ce matin que pendant une année d'enseignement à l'école.

Je pourrais continuer car j'ai entendu plein de commentaires positifs sur la Roue du développement et sur le processus inclusif de ce projet.

La force de cette dynamique dans notre région est simple mais efficace car la Roue du développement a été jumelée ou intégrée à un processus de développement économique communautaire et par la suite, quand les leaders, les membres de la communauté avaient choisi leurs projets prioritaires les mobilisant, la Roue du développement proposait un processus de renforcement des capacités de tous les promoteurs et promotrices de projets. Cette approche fut gagnante. On en voit les impacts directs. Dans cette région, plusieurs tentatives de concertation et de réalisation de projets prioritaires n'avaient pas autant réussi dans le passé. Mais cette démarche structurée et globale semble permettre cela. La Roue offre une approche plus complète et elle ajoute une valeur ajoutée comme façon de faire soit la création de l'entreprise sociale. On voit de moins en moins des partenaires financiers qui vont financer d'année en année des organismes et les défis sont grands de se maintenir en vie... et les entreprises sociales donnent un moyen visant la prise en charge, l'autonomie et l'autofinancement. Souvent les groupes allaient voir les mêmes bailleurs de fonds d'année et année et quand il n'y avait pas de financement les projets tombaient à l'eau. Mais ces projets pouvaient être très importants pour la communauté. Mais on ne savait pas comment faire cela autrement.

La Roue offre des solutions au-delà de la boîte « out of the box »... lors des ateliers, quand je présentais des exemples, je présentais l'impact de ces projets concrètement dans les communautés et cela inspirait les participants.

**D'avoir adapté le contenu aux membres de ta communauté, pouvez-vous nous partager vos impressions sur l'impact que cela a eu :**

Mes perceptions de l'impact sur la communauté francophone de la région du Niagara concernant le processus et de la Roue, les prochaines étapes...

Et bien le tout s'organise, des rencontres de suivis avec des promoteurs désireux d'assumer le leadership du développement et avec des jeunes ont déjà eurent lieu et plusieurs autres demandes d'ateliers de la Roue se font entendre, car la demande de formation est encore là.

**Pensez-vous que vous avez réussi à renforcer les capacités des promoteurs et promotrices de votre région : OUI, absolument!**

**Et du RDÉE :** Oui, car il y a eu des discussions importantes à ce sujet au sein de l'équipe sur l'importance de ce développement et des démarches similaires seront lancées par le RDÉE dans les autres régions Windsor, Simcoe, etc.

**Enfin, avez-vous un dernier commentaire :** Et bien maintenant, je suis devenu une personne ressource pour les autres membres de l'équipe du RDÉE.

**Missive de Dominique Guénette envoyée au RDÉE et à la coordonnatrice du projet en Ontario**

(En attente d'une entrevue plus exhaustive sur le sujet)

Bonjour à tous,

Je suis heureuse de l'intérêt qu'a suscité notre façon de présenter le projet de la Roue du développement dans le cadre des initiatives coopératives ici au Conseil de la coopération de l'Ontario (CCO). On utilise cet outil de travail, que nous avons adapté pour le développement coopératif. Nous sommes ici pour montrer à nos groupes comment faire et garantir un certain succès au développement des coopératives.

Comme vous le savez maintenant, le CCO utilise la Roue du développement adapté à chacun des groupes avec qui nous avons affaires. Nous nous en servons comme un outil pour mieux faire prendre conscience aux individus du travail qu'ils ont à accomplir pour réaliser leur projet. C'est de partager le processus de développement avec eux pour qu'ils sachent notre et leur rôle et responsabilité à l'égard du développement de leur projet, ceci pour leur permettre de se responsabiliser dans la création de leur entreprise.

Nous avons adapté l'outil dans le sens que nous l'avons spécifié au modèle coopératif comme une des formes particulière d'entreprise d'économie sociale. Nous visons l'atelier long, à chacun de nos groupes promoteurs comme étant la première étape du processus de notre relation de travail.

Nous avons aussi adapté la programmation de l'atelier à notre processus d'appui aux entrepreneurs. C'est-à-dire, nous favorisons une façon de faire qui est beaucoup plus interactif qu'informatif. Nous vivons l'atelier long dans le but de bien connaître ensemble le développement de l'entreprise dans laquelle nous allons œuvrer afin de créer un plan d'action concret.

J'espère que ce partage d'information vous permet de comprendre comment nous nous servons de la Roue du développement pour mieux appuyer le développement d'entreprise d'économie sociale. **À bientôt ! Dominique**

**Missive de Francine Lecours, agente du RDEÉ dans le Nord, responsable de livrer les ateliers avec sa collègue Patricia Ricard.**

Ce message a été envoyé par courriel envoyée au RDÉE et à la coordonnatrice du projet en Ontario

(En attente d'une entrevue plus exhaustive – après le 7 juin)

Bonjour Ethel,

Juste une petite anecdote en passant qui va probablement te faire sourire. Le 1er mars comme je te l'avais mentionné, je tenais ma première rencontre pour la fondation communautaire. Donc après la présentation de M. Bélanger j'ai conclu en disant que je ne pouvais initier ce projet seule et est-ce que quelqu'un s'embarquait avec moi. Eh bien le tout a été un très grand succès. Le comité provisoire est composé de 10 membres. Avant de quitter j'ai demandé à chacun ses commentaires en faisant un tour de table. Quelqu'un a dit c'est un très beau projet il faudrait s'assurer de débiter le tout sur le bon pied afin d'avoir une bonne base. Ma belle Gaétanne de la Radio, qui avait participé à la Roue du développement quelques jours avant, lui répond et bien si tu étais venu à l'atelier de la Roue tu ne douteras pas que nous avons les bons outils pour partir

la barque sur la bonne voie. J'ai pensé que tu aurais tellement aimé ça être là car les gens qui l'avait suivi on tous exprimé leur accord. J'ai donc expliqué a M. Bélanger que nous avons commencé les ateliers et que les gens les appréciaient beaucoup. Donc chapeau nous avons des bons outils en main pour appuyer notre développement de projets. Les commentaires des gens en sont la preuve.

Francine

## Attachment Two

### RAPPORT DES ORGANISATIONS PROVINCIALES ET RÉGIONALES ONTARIO – 2006

<b>Compilation des réponses</b>				
<b>Nombre de répondant.es 14</b>	<b>Services</b>	<b>Total</b>	<b>A trait spécifiquement à la Roue du développement (RDD)</b>	<b>TOTAUX GRÂCE À LA RDD</b>
12/14	Activement présents dans le développement d'entreprises sociales			
8/14 (Représentant 5 organisations)	<b>Services directs en appui technique TA</b>			
	En formation et information	60 sessions rejoignant 1128 personnes		
6/14	En développement organisation d'entreprises sociales	98	86	<b>86</b>
8/14	En développement d'entreprises sociales (SE business dev.)	72	44	<b>44</b>
5/14	Services directs de suivis (aftercare)	33	33	<b>33</b>
5/14	<b>Services de références ou courtage de services</b>			
	Formation et information	149	106	<b>308</b>
	Développement organisationnel	81	42	
	Développement entrepreneurial ( SE business dev )	118	80	
	Services directs (TA)	36	36	
	Subventions	283	39	
	Accès à du financement (prêts, crédit)	5	5	
	<b>Services directs de financement</b>			
1/14	Services de financement et crédit	8	5	<b>5</b>
2/14	Offrent des subventions (Il n'est pas prouvé que ces projets qui ont reçu du financement pour développer leur entreprise sociale que cela est dû à la RDD)	39		
	<b>TOTAUX DE SERVICES D'IRECTS EN APPUI TECHNIQUE TA</b>			<b>471</b>
	<b>Note :</b> <b>En 2006, 14 nouvelles entreprises sociales ont été créées et 23 autres entreprises sociales ont pris de l'expansion ou se sont consolidées</b>			

### Attachment 3 ONTARIO - Mise à jour concernant les ateliers

	Date	ATELIER	Ouvert ou ciblé	# Partici pant.es	# Inscription s en ligne	# Questionnaire des prochaines étapes	Rapport d'évaluations	Animation	Commentaires
1	16 février 2006	RDEE Navan - pilote	Ouvert incluant les membres du PSG	36	33	2	?	Ethel	
2	12 mai 2006	RDEE CSO Niagara Falls	Ouvert – table de concertation CSO	31	27	12	Compilation Oui (25)	Ethel	Certains participants provenant des milieux urbains
3	26 octobre 2006	RDEE Nord Sturgeon Falls	Ouvert- table de concertation Nord	24	15	6	Compilation Oui (19)	Ethel	2 inscriptions ont été prises à la porte – sans doute pas entrées en ligne
4	13 février 2007	RDEE CSO Welland	Ouvert	24	17	5	Compilation Oui	Léo	
5	15 février 2007	RDEE CSO Welland	Jeunesse	20	19		Compilation Oui	Léo	
6	22 février 2007	RDEE CSO Niagara Falls	Ouvert	13	13		Compilation Oui	Léo	
7	22 février 2007	RDEE Nord Hearst	Ouvert	34	32	10	Compilation Oui	Ethel	2 commanditaires
8	24 février 2007	RDEE Nord Moonbeam	Ouvert	24	22	14	Compilation Oui	Francine et Patricia	1 commanditaire
9	24 mars 2007	RDEE CSO St-Catherines	Ouvert		4		En attente du rapport d'Émile	Léo	Rapports d'évaluation envoyés à Emile pour entrer de données
10	14 avril 2007	RDEE Est Sarsfield	Ciblé : Coopérative multiservices					Pascal	
11	16 avril 2007	CCO Casselman	Ciblé		10			Dominique	
12	18 avril 2007	RDEE CSO Port-Colborne	Ouvert		23		En attente du rapport d'Émile	Léo	Rapports d'évaluation envoyés à Emile pour entrer de données
13	30 avril 2007	CCO Alfred	Ciblé : Maison familiale rurale					Dominique	
14	23 mai 2007	CCO Embrun	Ciblé coop					Dominique	
15	25 juin 2007	RDEE Est	Cible : Contact culturel de Sudbury					Pascal	
16	15 septembre 2007	RDEE Est Peterborough	Ouvert					Pascal	

TOTAL							
À l'extérieur de ce projet							
29 novembre 2006	Ottawa	Ciblé : Conseil de planification sociale	8	-	3	Ethel	Ceci fut un contrat à part de ce projet, en milieu urbain, c'est pourquoi nous n'avons pas fait l'inscription en ligne.
2 mai 2007	CCO Ottawa	Ciblé quelques coopératives		6		Dominique	Observation par le RDEE
	CCO	Ciblé municipalité				Victor	Présentation brève du processus de développement de l'entreprise sociale - RDD

Ethel Côté – Mai 2007