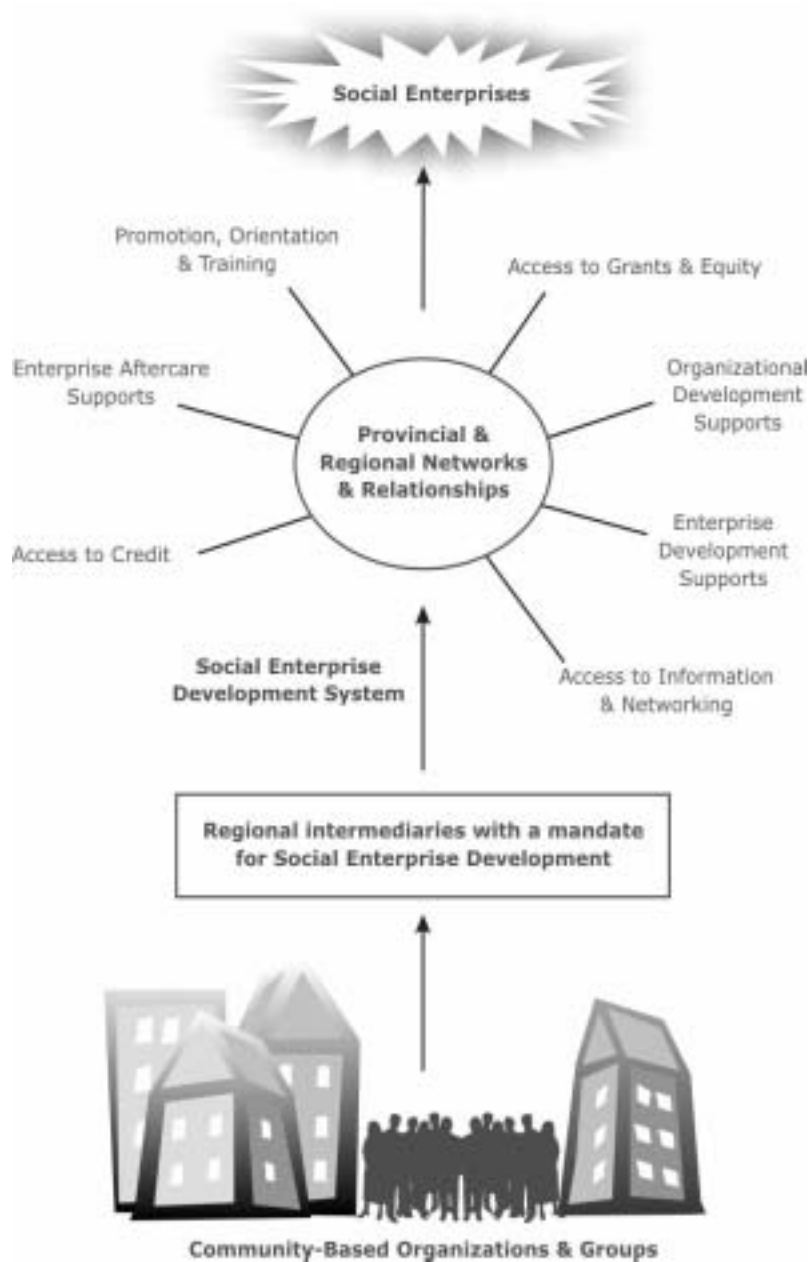


Building Capacity for Social Enterprise Development



**Canadian Centre for Community Renewal and the
Centre for Community Enterprise
With funding from Canadian Rural Partnerships, Agriculture and
Agri-Food Canada**

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1.0 The Model

The main goal of this model is to test the application of a social enterprise (SE) readiness assessment and planning tool through regional site capacity building. The model also tests a process for increasing the awareness, capacity and resources available for social enterprise development through provincial steering groups (PSGs) established to provide an overview of project impacts, support access to resources and to collaborate on the realization of the goals. In BC, the model is being tested in two sites: a northern region and an urban adjacent region. In francophone Ontario there are three sites covering the entire province but focused on a particular population, the francophone communities. Within Ontario, emphasis is being given to more specific sub-regions. Thus, one province is geographically focused and the other is primarily population focused.

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

- The SE Checklist is at the heart of this model. Regions are trained to use it with community organizations and groups, as both an early assessment tool and an ongoing planning tool.
- Workshops have been designed as ways for Regions to promote and orient community groups to SE and to the Checklist:
 - Introduction to SE (2 hours) is designed to be used as a promotional tool and pre-qualifier for the full day workshop. It covers the definition of SE, the principle of reciprocity, provides examples of the range of types of SE and has participants begin to identify their local opportunities and assets related to SE.
 - Assessing Readiness & Getting Started in SE (7 hours) results in participants determining if their organization is ready for SE now and if so, what priority steps need to be taken. Participants apply the checklist to their own organization. In this workshop, "no" is a good answer that can save valuable time and effort within the organization. Those that answer "yes" are connected with regional organizations for ongoing technical assistance.
- Promotional plans are being developed to proactively target both geographic areas and particular sectors where SE may be more useful, or there may be more interest. The 2 hour workshop is likely to be delivered about twice as often as the full day and is a vehicle for engaging decision-makers and other possible resources in supporting SE as well.
- CCE provides ongoing coaching, resource identification and training for regional orgs.
- Regions are connected to provincial level organizations with a mandate for SE through the PSGs. At this level, participants review findings, discuss gaps and solutions and are expected to take some leadership toward strengthening SE Development in the province.
- The quarterly newsletter and website resources are other ways we can share the lessons and work to engage others in each province.
- The research component is building a base of knowledge about service delivery in each province, and is feeding important information to the PSGs for their deliberation and potential action.

2.0 The Evaluation Framework and Approach

This report describes activities, outcomes and impacts of the first nine months of the project. The project includes two sites in BC and three sites in francophone Ontario. Each province brings a very different context to this work, so results are reported separately and then

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integrated where appropriate. In addition, there are several levels of reporting related to the primary goal of building capacity for social enterprise development:

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

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

This report speaks to:

1. What we have learned through the structuring process
2. What preliminary impacts can be discerned to date
3. What "baseline" information has been yielded thus far from the first stage of the research. By baseline we mean the starting "snapshot" of the current capacities and conditions related to SE Development. Subsequent reports will be able to speak to the question of change over time and the impact of the project more specifically.

3.0 Implementation of the Model to Date: Overview of Activities (9 months)

- Working with organizations in Alberta to identify regional sites and ultimately to determine the project would not proceed there.
- Securing funding in BC (proposals into WED) and Ontario (FedNor confirmed, Trillium looks positive - will hear at the end of June)
- Establishing the PSGs (1 meeting held, new members recruited, 2nd meetings in June)
- Developed data bases and evaluation tools; tested tools; switched DB programs from MS Access to FileMaker Pro.
- Gathered baseline data for provincial/regional level in both provinces and completed baseline report.
- Wrote Building Community Wealth (a workbook), designed two workshops the related facilitator guides and tested them (3 times in BC and 2 times in Ontario).
- Initiated Facilitators Training and development of training package/materials (2 trainings in Ontario and 3 in BC to date)
- Coaching of Regional (site) staff on: promotions strategies and tactics, development of client case management and approaches to meeting demand for technical assistance, roles and responsibilities, etc.

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- Four workshops (2 Intro and 2 Full Day) delivered in Ontario to 60 Community based groups and organizations (CBOs); Six workshops (4 Intro and 2 Full Day) delivered in BC to 99 CBOs.
- One workshop for funders in Alberta and a 2 hour overview of the tool at the National CCEDNet conference in Vancouver.

The delivery of workshops in the regions, and the related technical assistance delivery for SE Development, started in March. We are a couple months behind schedule with training, and found that regional staff needed more coaching and support around promotions and delivery than expected. While we have seen some initial impacts, it is perhaps premature to know if these will bear out over the longer term. The summer months are not good for workshop delivery, so after the session in Chilliwack on June 8th (which is not included in this data) we will not see any regional delivery or promotion until the fall.

4.0 Observations on SE Readiness in Alberta, BC and francophone Ontario

We have observed some differences in each province in terms of their awareness and support for social enterprise and current levels of collaboration and cooperation between organizations with a mandate for social enterprise development.

The francophone organizations in Ontario have young, but dynamic networks and round tables that they participate in already. They are also fairly strong in their orientation to collectivity (versus individualism) and to using SE as a tool for increasing local ownership, control and equity, both geographically and for their own interest group/populations.

In Alberta, we saw the opposite. Key development organizations with a mandate for SE (or who should have a mandate for SE but have not yet endorsed it as a useful tool) did not have either an informal or a formal way of connecting across sectors. Relationships simply did not exist between some key provincial networks – Community Futures, the co-op sector, the agricultural societies and the Family and Community Services network. In addition, key organizations had not yet grappled with the principles of SE, and were not ready yet to take it on as a development tool.

In BC, provincial level organizations had been meeting for a year around social economy issues and in some cases there were relationships between provincial and regional organizations as well. There was some history of strategic level collaboration between several organizations that make up the provincial steering group. SE was already being viewed as a useful tool for development.

5.0 Structuring the Project: Impacts and Lessons to Date

This section describes activities and the impacts related to those activities that were undertaken early on in the project as phase one organizing and structuring. The lessons in this section are related to how we promote, organize and create relationships and structures within which we can do some work over the longer term. How does one organization (CCE) get the commitment and ownership it needs from others to move this forward? These early stage

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conclusions are boxed for easy reader reference. In some cases, activities continue and we are still learning as we go.

5.1 Provincial and Site Selection

As a first step CCE recruited provincial co-ordinators with relationships and expertise in their own provinces. The relationships, and their knowledge of organizations services, etc. has proven to be a key factor in the start up or structuring phase. Second, we looked for regional organizations/sites with the mandate and capacity to provide SE Development in their region and an interest in working with the project.

In Alberta, CFDCs and other regional organizations chose not to participate given their current mandates, internal constraints and issues. We tried to work at both the local/regional levels and the provincial levels with the CFDCs, with no success. There was also considerable resistance to working with an out of province, for-profit consulting group (CCE), notwithstanding our non-profit structure. WED Alberta was not willing to provide direct support other than through applications from CFDCs or other regional organizations they already fund. The Ministry of Agriculture, Food and Rural Development offered some support, but was interested in a small capacity building pilot and not the research component. Likewise, there was some interest from Aboriginal Affairs, but their own development initiatives and timelines precluded this project going forward at this time. We worked with the Family and Community Services Society (FCSS), Alberta Community and Coop Association (ACCA) and the Alberta Association of Ag Societies to structure a joint proposal and engage other funders, but this effort did not build the level of commitment required. CCE and our associate Veronica Vinge continue to support (outside this project on a pro bono basis) the FCSS and Alberta Ag Societies organizations in their interest in developing an alternative SE project for at least one region in Alberta. Both organizations have struck Project working groups and by May 31 they will have begun proposal development activities.

Alberta Impacts: The project did connect three organizations that had not connected before and it could be that those relationships will continue in some way. We are not sure the project could have been approached any differently given the strong resistance to outsiders and the jockeying for position and funding between organizations. There is also a strong underlying resistance to collective ownership in preference for private, which means there is less overall support for SE. Also of interest is the notion of needs based funding that WED was using. They would only support proposals coming from the communities themselves.

In Ontario, sites were identified very quickly. There were even other provincial organizations that wanted to participate at the regional level, who opted to remain on the PSG when RDEE was selected as the regional organization. The resulting structure in Ontario gives us three regional sites that cover the whole province and that are part of a larger provincial organization and other networks. This means many participating organizations in Ontario are inter-connected, or part of a larger network, to start.

In BC, one of the three sites had to drop out of the project due to their own funding cuts and issues. This leaves us with 2 regional sites that are quite different (northern and urban adjacent) and operating quite independently from each other. Regional sites

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in BC are not inter-connected the way they are in Ontario. Recently, due to the inability to advance proposals with WED, an existing site has laid off the lead person assigned to this project, resulting in another trainee requesting to pick it up – “off the side of her desk”, rather than lose it. The project is tapping into staff resources in all five sites that were already fully committed but have nonetheless dedicated time and resources to building their own capacity in this area.

The approach of funders raises an important question: what happens when the community (or an organization representing community) could benefit from something they know nothing about – and don't know that they don't know it? How do we scale up what works, when many communities simply aren't aware of the tool, or the benefits? How do we balance efforts to share what works, or new approaches, with the need to let communities drive their own agenda?

There are also questions related to organizational capacity to take on new approaches, to participate in training and research. If we believe it is important, we need to find ways to facilitate participation that is not so onerous or time consuming for already over-extended organizations, or that provides resources for the additional work.

5.2 Provincial Steering Groups (PSGs): Collaboration

To date there has been one PSG meeting in each province (Nov/Dec 2005). In this area we are interested in the degree to which NON-REGIONAL PSG members contribute or participate outside of meetings however, given that meeting attendance is the baseline, or minimum expectation. Both co-ordinators have been in contact with members since that time in order to collect baseline research data and update them on the project. Regional workshops are also promoted to PSG members.

Impacts in BC:

- 1 formal non-meeting interaction between a PSG member (ENP) and regional site (FVSCE) in BC to negotiate service delivery of ENP by the FVCSE and another to negotiate a fee for service sale of the ENP book (*Canadian SE Guide*) by the FVCSE.
- 44% of PSG members have attended workshops (or sent staff)
- 22% (2 members) of the BC group have requested workshops for their board/staff/members, including the BC RDEE group who had a session with our Ontario co-ordinator in March
- 2 members have been in touch to offer funding leads, contribute materials, etc.
- SE client data is tracked by 50% of the PSG members
- 1 formal discussion between CCE and a BC PSG member (ENP again) to explore how the project workshop might qualify participants to apply for ENP grants without attending the (Vancouver based) ENP workshop; this would increase access to grants in rural, outlying areas of BC
- 1 BC PSG member referred us to BC Ministry of Health related to their work in the food security sector – that conversation will start with participation in a June workshop

Impacts in Ontario

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- 64% of PSG members have attended workshops (or sent staff)
- 14% have requested or referred us to a workshop for other regional orgs they work with (FedNor for all Ontario CFDCs and Trillium for Ottawa Chamber of Voluntary Orgs)
- SE client data is tracked by 100% of members (with the exception of after-care and some financing details)
- Participation of "potential" funder (Trillium) and current funder (FedNor) has been very pro-active and consistent at meetings and between (sharing leads, asking questions, etc). They have been champions of the project and active collaborators.

It is too early to know to what extent the approach of the project design, or the more particular approaches of provincial co-ordinators, might have contributed to these results, or not. To date there are a few quite active members of the PSGs and others that have not been engaged beyond meeting attendance. Even for those who are very actively engaged however, it has been challenging to get some information from them.

5.3 Regional Organizations: Participation & Ownership

Regional organizations are participants in the PSG, as well as the core delivery capacity for the project. They are expected to become familiar with the tool and the curriculum and to deliver ongoing technical assistance to CBOs undertaking SE development in their regions. Their staff time, promotional and service delivery costs are all in-kind to the project. Both BC sites have had 3 staff participating in training to date. In Ontario, regional sites have identified at least 4 staff each that they want to have trained over time. This in itself is a strong indicator of commitment and ownership.

To date, these organizations have participated in orientation and training, and the organizing and promotion of initial workshops in their areas. Training has included the following steps and is ongoing as required:

- Full day orientation to the materials, facilitator guides and promotional tactics.
- Observing both workshops and feeding back with critique, questions, etc.
- Identification of their strengths and weaknesses (readiness) to deliver different sections the workshops.
- Tailoring training and coaching, as well as future workshop deliveries, in a way that leverages strengths and addresses weaknesses of each trainee
- Review of all case studies on the website; used a scenario to work through and apply the checklist; development of a range of SE examples linked to curriculum.
- Role play developed to increase their comfort answering a range of participant questions.
- Tailored coaching and assignments as required.
- A full day workshop was video-taped and is currently being edited to create a training video for future use by regional sites.

Impacts to date:

- One set of workshops (the Introductory and the Full Day) have been promoted and delivered in each region of BC, and two in Ontario as well. The workshops were accompanied by orientations and training sessions. Both provinces are also using

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conference calls with regional staff to provide coaching and do project planning between training sessions.

- All trainees have completed advance reading and homework assignments to date.
- In BC, the Intro to SE workshop has been delivered independently by one site (with an average evaluation of 4.5 out of 5 for usefulness and facilitation), and the full day will be delivered independently in June.
- In BC, 1 regional site has developed additional workshops to accompany the project curriculum. The other regional site has used portions of the curriculum integrated into other sessions in their region. This is a strong indicator of ownership.
- Ontario regional staff have taken hold of the SE checklist, more than the workshop delivery, and have begun to use it with individual clients and projects already.
- In BC, 4 trainers are ready to deliver workshops (or have already delivered). Their own delivery is followed by feedback from CCE staff who observe the workshop.
- In Ontario at least 1 is ready, and others are still in the training process.

It is important to note that demonstrated participation and ownership are relative to time and resources available. This tension is evident in the project already. For example, a BC regional site has indicated that "the learning is amazing" and "the value of pre-developed curriculum she can test and adapt is huge". On the flip side however, the lack of paid staff time means promotion needs to focus on the "low-hanging fruit". This means that while there are opportunities to connect with many sectors, there simply isn't time to build the relationships required to engage them in considering SE. In Ontario this tension has been evident in the difficulty to schedule workshops and training amidst the many other commitments regional staff have.

Another example from BC illustrates this tension as well. Staff from a regional site spent hours to "convince" a local paper (in a community within the region but not where they were located) to run an article on the workshop, even though they "did not have a local address". In this case, buying an ad would have been more cost effective, but it would not have helped establish a relationship with the newspaper for future promotion. Building local ties and support (using a community development approach) takes more time than it does simply to "advertise", but it is essential to learn about local politics, and then work toward longer term support of/use of SE in any area.

5.4 Workshops and Materials: Stimulate Awareness & Engagement

The process of having draft materials, that are then tested and used to engage regional and provincial organizations, has proven very effective. Test after test has resulted in innovations and improvements to both the materials and the curriculum and delivery methods. Final tests take place this month, and we are confident that the product is of very high quality. There are two groups impacted by the materials, and the process for developing them. First, the regional organizations themselves, and second, the CBOs that attend the workshops. There have been 169 CBOs and groups participating in workshops to date.

Impacts:

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- The process of reflecting on content and materials has stimulated more analysis and understanding of SE among regional organizations/trainees.
- All workshops delivered by CCE to date have averaged 4.7 out of a possible 5 in evaluation ratings for delivery, content and usefulness. The definition of SE, the examples provided, the SE Checklists and the Enterprise Selection content are frequently identified as the most useful aspects of the workshops.
- As mentioned in 5.3, regional staff have all demonstrated some manner of “taking hold” of materials and using or adapting them.
- Both BC sites have had their profile raised in the non-profit sector: 35% of participants were not familiar with them until the workshop. In Ontario the portion who were new to RDEE is much smaller given the nature of the francophone community and existing networks. All regional sites have done work to create expanded contact lists for promotional purposes and are tracking workshop participants for ongoing promotion and networking.
- One BC site has had participants attend from adjacent urban areas, and from other rural areas in the province. This could lead to additional service delivery opportunities in the future. Ontario workshops have also attracted urban organizations from outside the project areas and time will tell if this leads to new relationships.
- Of those CBOs in BC who have attended the full day workshop, about 50% have indicated “no”, they are not ready for SE, and the other 50% have indicated they want to proceed with next steps. A full analysis of this group (the CBOs), the impact of workshops, and their needs will be completed over the summer months, following the session in June, and used to inform approaches to delivery in the Fall.
- Regional orgs have been assessing their own capacity and establishing relationships with other consultants to fill gaps in their own Technical Assistance (TA) delivery expertise. There have been no TA requests to date coming from workshops, but it is very early yet.
- There have been 31 downloads of Building Community Wealth – draft 1 – to date. 6 of these are from the US and other countries.

The process of engaging the regional organization staff in material testing and development has definitely contributed to their sense of understanding, and ownership, of the materials and delivery approach. In BC, both sites have clearly taken hold and are already adapting and enhancing the workshops and in Ontario the SE Checklist is already being used by regional staff with a range of clients.

Further, in a preliminary review of workshop results, the use of the full day workshop to help CBOs assess their readiness would seem to be successful as well, given that close to 50% decide they are NOT ready. This is a considerable time saving for their own organizations exploration of SE, and for the regional organizations that exist to support them. Workshop evaluations also indicate high “usefulness ratings” (4.7 out of 5) for a variety of workshop resources and tools, even among those who decide NOT to proceed with SE development.

5.5 Research Tools and Methods: Observations to Date

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The design of a draft framework and tools was a useful way to engage PSG members in thinking about both what they wanted to measure, and how. In both provinces the process of thinking about what they wanted to learn raised new insights for PSG members. Second drafts of the tools were then tested: the Provincial/Regional Survey tool, the CBO registration tool and the CBO Next Steps Survey (completed by those going forward at the end of each workshop). The tests of the tools was very useful in that it allowed us to identify some missing factors, where there was confusion, and to think through how the information would be used. These tools have been revised a third time and are now being input into Data Base format for ongoing data entry and reporting. There are several challenges to the research component that are worth noting:

Challenges:

- PSG members are very busy people and getting them to review the survey tool, participate in an interview and then respond to new or changed questions based on tool revisions has been a challenge. Consistent reminders, emailing questions ahead and other tactics have been required.
- We did not recognize some problems until we attempted the analysis of the responses. This required contacting members again for clarification around information that simply didn't make sense. In some cases the question had been misinterpreted and responses changed dramatically. These kinds of issues were flagged for us only because of our own knowledge of the organizations and the context in each province. Interviewers without this knowledge would not have picked up on some of the inaccuracies.
- Likewise with the CBO tools, it was not until they were tested and we analyzed results that we identified gaps, inappropriate answers to questions, etc. and were able to clarify our language sufficiently for consistent replies. We continue to reflect on more straightforward and meaningful ways to collect information from CBOs who DO want to proceed with SE development. The Next Steps Survey is in its second revision, and could be revised again, given results from the June workshop. While this plays havoc with data consistency over time, it is an important part of the learning related to engaging community groups in longer-term research efforts.
- The data base itself has been the biggest challenge and delay. Originally designed using Microsoft Access, we have now purchased File Maker software and are in the process of entering additional fields and data there. Access was not useful for sharing results/files and was not user friendly in terms of adding new fields or programming reports. This task of entering data and managing it's reliability has also proven to be more time consuming than originally thought and we have hired a contract employee dedicated to this function who also has data base expertise.
- Related to the data base, the process of coding participant responses has required more time given the French language surveys requiring translation by BC team members who are not always familiar with the organizational or cultural contexts. The coding is now accurate to both the BC and Ontario contexts and it is consistent across data bases and fields.
- Based on the discussions that the RS hosted in Winnipeg, we are now considering how focus groups can be used to expand the scope of input and validate findings.

We suggest that key respondent interviews with an interviewer who has knowledge of the landscape, the organizations, and can probe sufficiently is important for reliability of

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the data. Developing surveys and questionnaires for reliable and meaningful data collection, AND for the purpose of stimulating reflection and insight on the part of those being surveyed is challenging and must include time to test, revise and re-test tools. Part of the challenge is for those of us who are “developers” to get inside the perspectives of those who want to be “owners” (the CBOs) in order to use language and questions that are also meaningful to them. This is important if we want to engage them as collaborators in the research component over the next two years.

The other challenge is to ensure that we are collecting information to contribute BOTH to our own research objectives and to informing the regional organizations about prospective client interests and demands coming out of the workshops. The research tools and data must serve several masters and contribute meaningfully to different interests!

5.6 Communications: Impacts Outside Project Areas

First, the workshop promotion and delivery is a tool for communicating about SE and the project. In addition to the regional site activities here, CCE has delivered a 2 hour overview workshop at conferences which has introduced the checklist and the project to a broader audience. CCE has published the first quarterly project newsletter and promoted the project web page in our e-bulletin CEDworks! Both regional orgs are planning their own e-bulletin to workshop participants. Together, these activities have yielded the following impacts to date, most of which have not yet led to active partnerships, but are early stage leads for such potential:

- Regional workshop delivery in a BC urban adjacent site has attracted participation from urban centers, government and other rural areas. This has resulted in 2 specific requests for workshop delivery in non-project areas in BC (for the fall) and attracted 1 private consultant to our train the trainer activities.
- CCE delivery at conferences has resulted in 1 request for information about train the trainer sessions in Atlantic Canada and motivated several rural communities in BC to ask for more information as well.
- The newsletter (to 1,519 people in March) and CEDworks! have both stimulated immediate downloads of the workbook from the site (31 to date). In Ontario alone an additional 1,000 people are sent the newsletter through their own networks.
- The SE page of the website had 670 hits in 6 weeks since launching and the French language page had another 192 hits in that time. 153 of those visitors went to the resource page that includes the newsletter.
- It is important to note that in Ontario, documents and newsletters are being requested in both French and English so that francophone organizations can share them with English speaking partners and networks.

At this early stage it seems that although the website and materials are garnering interest, the workshops themselves hook people into the concepts and result in more specific requests to participate. Participants can see the value of the workshops for building a stronger base of knowledge (and collaboration/support) around SE in their own communities. This observation may or may not bear out over the longer term!

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5.7 Funding

The Rural Secretariat has been very collaborative, flexible and supportive around this project. Their staff are open to learning and clear about expectations. In Ontario, the Trillium proposal is promising and this will fully fund delivery there. In BC the WED funding does not look promising at all. We are currently re-working budgets and in discussions with regional organizations to determine a realistic scope for a BC project without additional funds. The biggest loss will be the Technical Assistance funds. We will be seeking other sources for those over the next six months.

Observations: The Ontario climate – at least with respect to the francophone communities and FedNor – is far more supportive of SE than it is in BC. In BC, WED required regional organizations to put significant effort into the development of their own proposals, while in Ontario, FedNor was open to our submission based on support and interest from the regional organizations. WED personnel changed continuously and were not as interested in working with us, while Ontario funders have been consistent and interested in building their own base of knowledge about SE. BC does not have a foundation with the capacity of Trillium so it is harder to find potential funding sources. The orientation of funders, development of proposals and negotiations can be immensely time consuming and frustrating at the best of times, but it is far more so when they are adversaries as opposed to collaborators around a common goal or interest. It is probably fair to say that in BC, the current funders for SE are those smaller, private institutions who already are supporting other efforts – such as Van City and Coast Capital.

6.0 Project Implementation: Impacts and Lessons to Date

Although the structuring phase of the project overlaps the implementation phase, and some structuring activities are ongoing (such as funding), we have determined that the workshop tests which were combined with initial trainings in each region, were part of the structuring phase of the project. One of the reasons for this longer structuring phase is that all trainees have not attended all the workshops, and therefore each region required their own initial training. Geography (distance to travel), cost and time were all factors in not being able to bring all the trainees to every site for progressive training.

As a result, the implementation phase does not begin in earnest until the fall, when regions will begin independent delivery with coaching. While this sometimes feels like a false delineation, and in the end the impacts will be as a result of the blend of all activities taken together, it has been helpful for our own thinking to approach the project this way.

The following section provides a baseline, where we have done that analysis, and in some cases we simply do not have data yet to be able to speak to a particular outcome or impacts. For 6.1 and 6.2 there are Provincial/Regional Baseline reports for each province. The baseline reports on the CBO level will be available sometime in July.

6.1 Provincial and Regional Awareness and Commitment Baseline

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There are consistently high levels of both awareness and commitment to SE among the staff and boards of participating organizations in both provinces (4 and 4.5 out of a possible 5 in BC and Ontario respectively). The development and delivery of actual initiatives was rated slightly lower in both provinces and had a much greater range of responses (from 2 to 5 out of 5).

6.2 Provincial and Regional Capacity Baseline

We are tracking the type and amount of SE service delivery as it relates to the mandate of each organization: training, organizational development services, business development services, after-care services, credit & grant services, referrals to other services, policy work and relationships with other organizations. In BC several PSG members do not track client services, and in Ontario we are missing data from 2 PSG members, which makes the information we do have less useful. Some of the findings, based on the information we do have, for 2005, are:

- Organizational development assistance is provided by 4 organizations in each province. BC members have reported 94 clients served (with BCCA serving 56 of these), and Ontario reported 56.
- Business development services are offered by 5 organizations in BC and 3 in Ontario. Ontario members report 66 clients for these services, and BC reports only 18, but 2 BC members do not track this information.
- Orientations and training sessions are provided by 4 organizations in BC and 3 in Ontario. BC provided 63 sessions related to SE for 270 people (but one organization did not track participant numbers at 58 different sessions). Ontario members report 42 sessions for over 300 people.
- SE After-Care services are provided by 2 organizations in BC and 2 in Ontario. 1 BC member reports 5 clients for this service and the Ontario members report 11. Most organizations do not track this information.
- Loans for SE are provided by 4 BC organizations. 2 of the BC organizations do not track loans. Loans are not provided by Ontario members. In BC 1 organization provided 3 loans during 2005.
- Grants for SE development are provided by 1 organization in BC and 4 organizations in Ontario. In BC, 26 grants were delivered and 45 in Ontario. In addition, Trillium Foundation of Ontario reported \$3 million in grants to support CED and/or Social Economy projects between the end of 2004 and the beginning of 2006. We do not have information on FedNor grants for 2005.
- Referrals for services, grants or loans are provided to some extent by all PSG organizations, although this information is not well tracked in BC. 4 BC organizations reported 20 referrals for various development services, 10 for loans and 7 for grants. 5 Ontario members reported 320 referrals for training, 52 for business development, 46 for organizational development, 30 for after-care services and 64 for grants or loans. They also thought that about 33 of those referred for funding had received it. None of the BC members followed up on referral outcomes.
- Funding sources referred to in BC include 6 organizations named frequently as sources of loans and 3 as sources of grants. In Ontario there were 13 commonly named sources for these services, many of whom offer both.

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- Several organizations indicate a formal policy mandate related to SE. In BC and Ontario several members rated SE awareness as 3 (out of 5) for municipal and provincial levels of government, while the federal level was rated higher. (Many members indicated "not sure" in response to these questions.)
- A formal assessment or screening process is used by 1 organization in BC and by 2 organizations in Ontario.
- Organizational relationships require further validation and clarification and will be reported on in the future. See *Provincial and Regional Baseline Reports* for details. One clear observation at this point is that the Ontario PSG members reported over double the number of organizations that they work with for the purpose of SE development, than were reported by BC members.
- Participant learning objectives in BC are focused on how to measure SE impacts, followed by knowledge of SE curriculum and public awareness approaches. In Ontario, the priority is overall stronger knowledge and skills for all aspects of SE development, followed by how to better access financial resources.
- Obstacles to more effective SE development reported by all members in BC were lack of resources for their own organizational work, and lack of grants and financing for SE. In Ontario, members reported the lack of public and private support for SE as the primary obstacle, followed by lack of resources and training to do their work more effectively.

There are some early, tentative observations based on this information. First, in BC we have two PSG members who are active in supporting SE, but whose lending and client services are focused on urban centers only, and neither track client information. Also, 1 of the regional sites and 1 provincial organization had only just begun to develop their SE or CED services, so their service delivery information for 2005 is limited. Both BC regional sites have loan services linked to their SE work, but do not offer grants. Overall, it is premature to form too many conclusions based on the information we have, but it will serve as a basis from which to measure impacts of the project.

Second, in Ontario, there is a much larger range of organizations engaged in SE in some manner, and generally, they are better connected than those in BC. Ontario members are more active in the granting field, but do not do any lending. In general, there is better access to development grants in Ontario than in BC, and organizations have a larger base of existing SE clients they have served. It will be interesting to see how or if these differences impact partnerships and service delivery over time.

6.3 Community Based Organizations: Who are they?

This analysis will be completed once the June workshops have been delivered. To date, we have 150 CBOs in the data base. Each CBO completes a registration form on-line prior to attending a workshop. This form will provide information about the type, budgets, services and sectors of each organizations or group, and what their initial interest in SE is.

6.4 Community Based Organizations: Awareness and Readiness

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This information is largely collected through post workshop evaluation forms. We know generally to this point that about 35% of CBOs in BC had not heard of the regional organization prior to the workshop. This is a strong indicator of the extent to which the workshop delivery is raising the profile of regional organizations within the social economy sector. We also know, generally, that about 50% of workshop participants are deciding that they are not ready for SE at this time. In most cases, they also know what they need to do to get ready, should they chose to continue to explore SE.

More detailed information will be available sometime in July, when the first CBO baseline report will be completed for the initial 160 or so CBOs that will have participated through to the end of June.

6.5 Community Based Organizations: Priority Tasks

After the workshop, those proceeding with SE complete a second survey (Next Steps Survey) that tells us more about what tasks they need to undertake, and if they need assistance. This is then followed up at the end of 2006 to assess actual task completion and identify key factors in their success, or lack of and the extent to which the project and the regional organization contributed to that.

7.0 Success Stories To Date

- 7.1** The feedback on the SE Checklist tool and the workshop curriculum is very positive, both from regional organizations and from workshop participants. Participants report insights and tangible learning that they can apply in their organizations. Regional organizations are making the curriculum their own, and using it as a base to build a stronger service delivery platform in their regions.
- 7.2** The workshops are definitely successful at creating higher profile for regional organizations within the social economy sector in their areas. It is yet to be seen if this will contribute to strengthen working relationships between the social and economic sectors in communities.
- 7.3** The "spin off" into other regions and with other organizations is just beginning, but early indications suggest there may be opportunities for scaling up within the project timeframe.
- 7.4** Collaboration with Ontario funders has been very strong and positive to date.
- 7.5** Notwithstanding the lack of interest or capacity in Alberta, the development of an alternative SE project proceeds there and we have just secured a provincial government champion to support that effort, without the research component. (This activity is related but not part of the RS project)

8.0 Conclusion

Funding the BC portion of the project has been the biggest challenge and frustration to date. The data base development should be finalized over the next month or so. Notwithstanding these project issues, it is clear that the approach is working to increase regional organization

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capacity for social enterprise – and to provide community based organizations with a tool for their own SE assessment and development. More than that however, the structuring phase has given us some additional questions about replication and scaling up and posed some challenges we had not considered. We are already learning more about how to introduce new concepts, and tools, to communities, and much more about how to better engage the organizations who are doing the development work, in testing and learning themselves.

Finally, a personal note. I am less certain that the particular approaches we designed will achieve the results we projected. That uncertainty is born of putting theory into practice (so far), the influence of other partners, openness to doing it a different way, unforeseen challenges, and the actual results of tests and evaluations that suggest there are still some missing pieces in the SE capacity puzzle. In the end, there may be something even better that emerges, or not, and we may be lucky enough to see results we had not imagined, and that is the terror and the joy of applied research! (Michelle Colussi)

9.0 Also available from CCE:

Contact Michelle at colussi@shaw.ca or 250-595-8874 or visit www.cedworks.com social enterprise page.

- PSG members lists for BC and Ontario
- Provincial and Regional Baseline Reports: BC and Ontario
- Provincial and Regional Questionnaire
- CBO Registration Form
- CBO Next Steps Survey
- Workshop Evaluation Forms
- Building Community Wealth: Workbook (draft 1)
- Introduction to SE: Workshop curriculum and facilitators guide
- Assessing Your Readiness & Getting Started in SE: Workshop curriculum and facilitators guide
- Training and resource articles/case studies
- Other training materials and exercises
- Newsletter #1
- Roles and Responsibilities of Regional Sites & CCE: draft agreement