

Confidential



**STUDENT EVALUATION CASE COMPETITION**  
**CONCOURS DE CAS EN ÉVALUATION POUR LES ÉTUDIANT(E)S**

**2019 Competition Final Round**

***Immigrant Services Association of Nova Scotia  
(ISANS): Volunteer Program***

**May 27, 2019**

The Request for Proposals in this document was developed for the Student Evaluation Case Competition for educational purposes. It does not entail any commitment on the part of the Canadian Evaluation Society (CES), the Canadian Evaluation Society Educational Fund (CESEF), Immigrant Services Association of Nova Scotia (ISANS) or any related sponsor or service delivery partner.

We thank ISANS for graciously agreeing to let us use its Volunteer Program ([Get Involved](#)) for the second round of the 2019 competition. We also thank Delaine Tiniakos-Doran for her input in preparing this case.

The Case Competition is proudly sponsored by:



Canadian Evaluation Society  
Société canadienne d'évaluation



CANADIAN EVALUATION SOCIETY  
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POUR L'ÉDUCATION

## Introduction

Congratulations to all three teams for qualifying for the Final Round of the 2019 CES/CESEF Student Evaluation Case Competition!

Your consulting firm has been invited to respond to the attached Request for Proposals (RFP) issued by Immigrant Services Association of Nova Scotia (ISANS) to create an evaluation plan for its Volunteer Program.

The Association, supported by an advisory group of external evaluation experts, has requested a briefing from each firm on their proposal.

Your proposal should demonstrate your understanding of the assignment and include a program logic model, a proposed methodology, an evaluation matrix, a mitigation strategy to address anticipated evaluation challenges and a discussion of an evaluation competency that is important for a successful evaluation of this program.<sup>1</sup>

Section 2.2 of the RFP identifies the proposal requirements in more detail. The assessment criteria for the proposals are identified in section 2.3 of the RFP. After considering the information conveyed in the briefings, the advisory group will recommend one of the proposals to the ISANS. The team that prepared the recommended bid will be declared the winner of the 2019 Student Evaluation Case Competition.

We look forward to your submission at the end of the day.

## Organizing Committee

The 2019 CES Student Case Competition Working Group and Case Selection Sub-Committee:

Kathryn Radford, Micheal Heimlick, Brian McGowan, Christine Sheppard, Tin Vo, Michelle Naimi, Sydney Cherniawsky, Mikki Campbell, Marla Steinberg and Sharon Margison. Bea Courtney continues to contribute in an advisory capacity.

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<sup>1</sup> [Competencies for Canadian Evaluators](#) is posted on the CES website under Designations. [Compétences pour les évaluateurs canadiens](#) sont affichées sur le site Web de SCÉ, sous « Titres ».

## Rules

1. Coaches must not communicate with their teams once the case document has been distributed.
2. Teams may use the internet to search outside resources but may not consult with any individuals or organizations.
3. Organizers may interrupt teams briefly to take pictures of members at work preparing their submissions.
4. Presentations should be no longer than 20 minutes. A time-keeper will give warnings as the end of the presentation period approaches.
5. The judges will have up to 10 minutes after each presentation to ask questions of the team.
6. Teams may present in either or both official languages. Judges will ask questions in the team's language(s) of choice.
7. A member of the organizing committee will print copies of the presentations for the judges. Teams are not permitted to provide any other materials to the judges.

## Questions or Problems

To communicate with organizers on the day of the competition, please call one of the following individuals:

Name	Phone Number
Micheal Heimlick	1-306-361-5904
Kathryn Radford	1-613-558-6457

**Have fun and good luck!**

## Request for Proposals (RFP)

### Evaluation of the Volunteer Program at ISANS

#### 1.0 Agency and Program Profile

##### 1.1 *About Immigrant Services Association of Nova Scotia*

Immigrant Services Association of Nova Scotia (ISANS) is the largest immigrant-serving agency in Atlantic Canada, with over 270 employees from more than 64 countries. ISANS provides a wide range of services to newcomers to help them build a future in Canada, including refugee resettlement, English in the workplace, family counselling and professional programs. It offers services in an inclusive manner, respectful of, and sensitive to, diversity. Partnership, professionalism and accountability are priorities in every aspect of the Association's work.

In December 2009, Metropolitan Immigrant Settlement Association (established 1980) and Halifax Immigrant Learning Centre (established 1988) merged to form ISANS. Over the years prior to this, the organizations helped immigrants with settlement, and with English language skills and employment. They assisted many different groups of people: Vietnamese refugees in the 1980s, Middle Eastern business people, former Yugoslavian professionals and Kosovars in the 1990s, Iranian and Filipino provincial nominees, and Afghan refugees in the last decade. Together as ISANS, their combined programs provide a wide range of support for clients.

ISANS receives ongoing funding from many different government departments, both federal and provincial. They were the first organization in Atlantic Canada to deliver many of the programs provided by Immigration, Refugees, and Citizenship Canada (IRCC).

ISANS is an acknowledged leader in the settlement sector in Nova Scotia and a member in the Atlantic Region Association of Immigrant Settlement Agencies. Its expertise stems from working with many partner organizations to deliver a wide variety of innovative services and programs.

Since the influx of Syrian refugees in 2015, ISANS has had significant increases in the clients served, its cadre of volunteers and the number of volunteer hours (see Table 1 for detailed annual statistics).

**Table 1. Annual Statistics**

	2015-16	2016-17	2017-18	% Change over 3 years
New clients	2,468	2,019	2,967	+20%
Clients served: new and existing	4,921	4,972	7,563	+54%
Language training clients	476	1,249	2,422	+409%
Active volunteers (all programs)	654	673	728	+14%
Volunteer hours (all programs)	23,079	38,347	39,252	+70%

## 1.2 About ISANS' Volunteer Program

ISANS' Volunteer Program, the focus for the evaluation, was introduced in 2009, to provide oversight and coordination across several volunteer support initiatives. The Volunteer Program, which is just one of many components of the organization, has grown and changed significantly in recent years, especially following an influx of Syrian refugees into Nova Scotia in 2015.

The influx resulted in a rapidly increasing demand for volunteer support, which has continued since, and it encouraged ISANS to take a more structured approach to its Volunteer Program. ISANS has subsequently secured more funding for the program, which enabled it to create more staff positions. For example, a full-time coordinator position for the entire Volunteer Program has only been in place since September 2018.

ISANS' Leadership Team recognizes the value of having a strong, adaptable volunteer program that is informed by evaluation. Given recent developments, ISANS would like to assess its volunteer engagement and management practices that have been in place following the Syrian refugee influx of 2015, i.e., 2016 through 2018. This will be the Volunteer Program's first evaluation.

About 794 volunteers are part of ISANS' Volunteer Program.<sup>2</sup> The Volunteer Program Coordinator oversees 10 volunteer coordinators across four programs: Canada Connects, English as an Additional Language (EAL), Special Events, and Classroom Learning. Volunteer opportunities are profiled on ISANS' [Get Involved](#) webpage. Each program has either its own mandatory training session or its own orientation session for its volunteers. The descriptions below provide further details.

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<sup>2</sup> Another 250 volunteers participate in more advanced volunteer placements under the Professional Mentor Program, the Practice Interview Program, and the International Medical Graduates Program. Broadly, these programs help new immigrants find employment in their chosen disciplines, including, if required, preparing for and obtaining the necessary credentials to practice their profession in Canada. These programs are more specialized than other ISANS volunteer initiatives, and are managed separately from the Volunteer Program. Therefore, they are outside the scope of the evaluation.

- 1. Canada Connects volunteers** offer support to immigrants settling in Canada. One or more volunteers are matched with a newly arrived immigrant family or individual. They meet with the family or individual once a week for two hours over a period of 6 to 12 months for conversation, friendship building and to introduce the family to their new community. There is a mandatory two-hour training session for new volunteers. About 50 to 75 new volunteers join Canada Connects annually.
- 2. EAL (English as an Additional Language) volunteer tutors or conversation circle facilitators** offer language support to immigrants through one-on-one tutor matches and/or group conversation circles. Volunteers are asked to commit to a minimum of two hours per week over at least three months. No previous teaching experience is required, as ISANS provides tutoring resources and training sessions throughout the year. Tutors learn how to create learning plans and offer support in literacy, listening comprehension, speaking, reading, writing, and pronunciation skills. Many university students from Dalhousie, Saint Mary's and Mount Saint Vincent Universities volunteer in this program in order to meet various course requirements for experiential learning style courses. This service also attracts other people who are interested in learning how to teach. About 100 new volunteers join the program as tutors and conversation facilitators annually.
- 3. Special Events volunteers** help with large events, such as a nighttime festival, community BBQs, and fundraising activities. Another event, *SupperNOVA*, is a multicultural potluck held two times a year for community members to get together to welcome newcomer families and celebrate the diversity that immigrants bring to the community. ISANS has a list of potential volunteers it emails when it needs to engage them. Some volunteers always participate when asked, while others volunteer less frequently or even infrequently. About 300 volunteers are needed on an annual basis for these events.
- 4. Classroom volunteers** are engaged by ISANS Language Program to provide one-on-one support to adults, helping them with literacy and numeracy activities under the supervision of an instructor. Orientation is provided by the manager of the Language Program. Volunteers commit to at least one class per week for a minimum of three months. Providing this support involves only a small number of volunteers annually, currently six in total.
- 5. Computer and Employment Lab Assistant volunteers** help either a computer lab instructor at one of two ISANS locations (two volunteers at the most, one for each lab), or in an employment lab assisting immigrants in preparing their résumés and cover letters. Volunteers are asked to commit to one weekly session for 3 months minimum. Orientation is provided during volunteers' first session. A total of about 10 to 15 volunteers serve in this capacity annually.

### **1.3 Program Challenges**

The programs described above have developed their own procedures over the years, with each having a different approach to volunteer recruitment, orientation, training and engagement in providing services.

Presently, the Volunteer Program is developing a central strategy for volunteer recruitment, because the 10 volunteer coordinators each use their own variety of methods within their individual programs. While ISANS is not currently experiencing problems finding volunteers, the Association wants to be better prepared in case it becomes difficult to recruit in the future. ISANS also wants to standardize its volunteer orientation and include volunteer recognition as part of the Volunteer Program. As well, ISANS wants to ensure that the Volunteer Program is effectively meeting client needs and is able to identify service gaps and new ways for volunteers to serve clients.

While ISANS' Leadership Team recognizes the benefit in evaluating the Volunteer Program, some of the 10 volunteer coordinators may not be familiar with evaluation, why it is important, and what it involves. The consultants undertaking this evaluation will need to work with the coordinators and volunteers to increase their understanding of the value of evaluation and ensure the evaluation meets their needs and does not place a burden on staff or volunteers. The consultants will also need to ensure that clients participating in the evaluation understand the importance of their input and that clients' range of English language skills can be accommodated.

## **2.0 Scope of Work**

### **2.1 Evaluation Services Required**

ISANS wishes to assess the effectiveness of its Volunteer Program from 2016 through 2018, from the perspective of the organization, the clients of its volunteer programs and the volunteers themselves. More precisely, the evaluation is expected to address the following five questions:

1. How effective are the current volunteer management practices (e.g., recruitment, orientation, retention)?
2. What principles and best practices should inform an organization-wide strategy for volunteer recruitment, orientation, recognition and retention, taking into account that ISANS' volunteers help clients from many different cultural backgrounds?
3. How and to what extent are clients benefiting from the volunteer support they receive, what are the benefits for the volunteers, and are there unintended outcomes?

4. How can the volunteer experience be improved?
5. What are appropriate outcomes and performance indicators for volunteer engagement that can be incorporated into a single evaluation framework for the Volunteer Program?

The evaluation should not over-burden staff, volunteers or clients. It should also be designed to accommodate people from different cultural backgrounds with different levels of English literacy.

## **2.2 Proposal Requirements**

The Advisory Committee expects proposals to include the following components:

1. An overview of your understanding of the Volunteer Program and the evaluation requirements.
2. A proposed program logic model for volunteer engagement, with supporting explanation that addresses at least one underlying assumption, one risk and one external factor that may influence whether the outcomes can be achieved. These can be part of the logic model figure or explained as part of the logic model narrative.
3. An evaluation matrix for the Volunteer Program, with a list of key evaluation questions, one to three indicators per question, and clearly indicating which indicator is linked to which question.
4. A description of how you would design and undertake the evaluation (i.e., the approach and data collection methods, and your reasons for the proposed methodology). Proposed data collection methods should be linked to proposed indicators. This should also address how you will effectively and efficiently involve the different stakeholder groups to gain their support for and involvement in the evaluation.
5. Anticipated methodological challenges, and how you propose to deal with them.

In addition, when presenting, please speak to how your proposed evaluation will involve the use of one or two CES competencies when interacting with program coordinators, volunteers and/or clients.

Teams are not expected to present a budget for this assignment; however, to help you in understanding the anticipated scope of the work, a budget of \$40,000 has been allocated to cover an estimated 40-50 consulting days.



### **3.0 Judging Criteria**

The criteria by which submissions will be assessed are as follows:

- 1) Thoroughness and quality of the proposal in addressing the requirements that are outlined in Section 2.0 of the RFP. (40%)
- 2) Quality of the presentation in terms of clarity, flow of information, persuasiveness, and interaction with the judges. (40%)
- 3) Team members' involvement and collaboration in the presentation and subsequent question and answer session. (20%)