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February 10, 2007

Mr. Robert Lalande, Director  
Canadian Heritage Evaluation Services  
15 Eddy Street  
Gatineau, Quebec K1A 0M5

**RE: CVI Formative Evaluation Briefing Note**

Dear Mr. Laland,

Regenerations is pleased to respond to the request of the Department of Canadian Heritage for a briefing note which critically assesses the formative evaluation of the Canada Volunteerism Initiative. We understand this assessment will inform the design of the upcoming summative evaluation.

Evaluation is an essential component of program and project cycles. It can be used to assess the impact of current program activities on those served and provides objective and credible information on which decisions and future action can be based. A summative evaluation will determine the overall effectiveness of the Canada Volunteerism Initiative in meeting its objectives.

We have identified the strengths and weaknesses of the data collection methods used in the completed formative evaluation. We have proposed additional methods which will add rigor and comprehensiveness to future evaluations of this type. Most importantly, we have identified what we consider to be the five most important evaluation issues for the impending summative evaluation.

We thank you for the opportunity to present our briefing note. Should you require further clarification, please do not hesitate to contact us. We look forward to hearing from you.

Sincerely,

Regenerations

## Background

Volunteers are the lifeline of many charitable and government organizations. Canadians have a rich history of volunteering and community involvement. Yet, according to studies such as the 2001 Canadian Centre for Philanthropy environmental scan and the 2000 National Survey of Giving, Volunteering and Participating, there has been a decline in the number of Canadians who volunteer and an increase in the number of hours contributed from those who do volunteer. These findings suggested that efforts were required to support volunteerism and strengthen the capacity of the non-profit and voluntary sector in order to provide meaningful and effective volunteer opportunities and increase volunteerism in Canada.

In response, in 2002, the Government of Canada selected Volunteer Canada and Imagine Canada (formerly Canadian Centre for Philanthropy) to deliver the Canada Volunteerism Initiative, a program designed to improve the ability of organizations to benefit from the contribution of volunteers, to encourage Canadians to participate in voluntary organizations, and to enhance the experience of volunteering. The Canada Volunteerism Initiative (CVI) was jointly designed and developed by representatives from both the voluntary sector and the federal government.

The CVI established three national centres and thirteen local networks, one in each province and territory. The national centres deliver a range of programs and services related to volunteerism through contribution agreements (totaling \$35M over the five years), as follows:

- The Knowledge Development Centre (KDC) (\$6.2M) - provides support for both local and national research to improve understanding of volunteerism. The Centre is operated by Imagine Canada (formerly the Canadian Centre for Philanthropy).
- The Information, Capacity-Building and Awareness Centre (ICBA) (\$21M) - manages a resource centre, an awareness campaign, and a capacity-building program. The Centre is operated by Volunteer Canada
- The Community Support Centre (CSC) (\$7.7M) - provides support for organizations to develop and test innovative methods for sustaining volunteerism. This Centre is also operated by Volunteer Canada.

The local networks ensure the CVI responds to the needs of voluntary organizations and volunteers in each province and territory. Through these networks, voluntary organizations of all sizes and representatives from various levels of government meet to exchange ideas and develop a better understanding of local priorities.

The CVI's objectives are to:

- Help organizations benefit from the contribution of volunteers;
- Encourage Canadians to participate in voluntary organizations; and to
- Enhance the experience of volunteering

The intended ultimate outcomes of CVI are:

- Increased participation in volunteering in Canada; and
- Increased capacity of voluntary sector organizations to provide programs and services.

In October of 2005 the Evaluation Services Directorate Corporate Review Branch Department of Canadian Heritage completed a formative evaluation of the Canada Volunteerism Initiative. The objective of the evaluation was to respond to the following questions:

- Has the CVI been designed appropriately for achieving the target outcomes?
- Is the CVI being implemented as planned?
- What tangible progress can be identified toward achieving the expected outcomes?
- How have the challenges encountered during the implementation of the CVI been overcome so as to ensure achievement of the short-, medium-, and long-term outcomes?
- What mechanisms have been put in place to collect data and monitor the performance of the Initiative? Are these mechanisms appropriate?

A summary of the formative evaluation findings are listed below:

- Design
  - CVI rationale is well defined and understood by all those interviewed
  - Program logic is sound and activities being undertaken can be plausibly expected to lead to desired outcomes
  - Some alterations in program design might be appropriate such as a refocus of efforts towards integrating project results into organizational practice, increasing the independence and capacity of local networks, and increased efforts in the area of knowledge management
- Delivery and implementation
  - The decentralized delivery approach was found to be generally sound and considered effective
  - Governance mechanisms are viewed as appropriate although interviewees identified the need for the Strategic Management and Coordination Committee to play a more strategic role
  - Most voluntary sector respondents felt that CVI had resulted in a unique and collaborative relationship with Government but questioned whether a true partnership could ever be possible between a funder and funding recipient
- Progress towards the achievement of results
  - Progress is being made towards the achievement of activities, outputs and immediate outcomes in all key program areas, although with some lags in dissemination and knowledge transfer
  - Although it was too early to make conclusive statements, evidence from interview respondents and from the file review suggest that the CVI is on track to achieving these results.
- Performance measurement strategy and practice
  - Ample data exists to suggest national centres and funding recipients are meeting the terms of their contribution agreements and contracts. However, reports and data pertaining to the CVI's performance are limited for the first two years of the Initiative.
  - Community Partnerships Program respondents recognized the need for an electronic database to facilitate gathering, synthesizing and reporting of results for the Initiative for monitoring and evaluation purposes.

## **Part A**

### **Critical Analysis of Formative Evaluation: Strengths and Weaknesses of Data Collection Methods**

#### **Method 1: Document Review**

A review and analysis of documentation pertaining to the CVI was undertaken in order to identify issues as they generally relate to evaluation questions and indicators.

##### Strengths

The strength of the document review is to establish the context of CVI as it relates to volunteerism in general and the importance of volunteerism in Canadian society.

##### Weaknesses

The weakness associated with the document review method is the narrow scope of documents reviewed. Plans, funding agreements, activity reports and centre evaluation reports were examined. These documents all pertain to the CVI directly. A document review of a wider scope could include academic literature pertaining governmental/voluntary sector partnerships and case studies of similar arrangements in other countries and jurisdictions.

#### **Method 2: Key Informant Interviews**

In-person and telephone interviews were conducted with key informants across Canada. Additionally, group and one-on-one interviews were conducted with network members and host organizations.

##### Strengths

The strength associated with such qualitative interviewing techniques is generation of in-depth, detail rich findings that inform process evaluation. Moreover, the terms of reference of the formative evaluation dictated the selection of interview types. This indicates a collaborative approach to the evaluation framework. Site visits incorporate an observational evaluation component in order to enrich research results.

##### Weaknesses

A strictly qualitative interviewing process guided by deliberative sampling lacks the necessary breadth and wide scope needed to effectively cross-verify and triangulate research results. The deliberative sampling procedure guided by the CPP lends itself to non-sampling errors without the benefit of mitigation from an alternate data collection method.

#### **Method 3: File Review of Funding Recipients**

Documentation of 39 funding recipients was reviewed.

##### Strengths

Systematic document review of funding recipients informs research that addresses central evaluation questions. The file review process was varied in so much that files for five different kinds of funding recipients were reviewed.

##### Weakness

Local networks that were to be visited personally for interviews were not included in the file review process in order to minimize burden. As a result, the file review was focused on networks that were considered 'less mature' than the five selected for site visits. As result, the process was not sufficiently varied between more and less mature networks.

#### **Method 4: Telephone Interviews with Funding Recipients**

Telephone interviews were conducted with a sample of 16 funding recipients.

#### Strengths

Projects were selected to achieve a mix of provinces, funding years, funding amounts and themes. Qualitative interviews provide information on lived experiences and anecdotal evidence.

#### Weaknesses

The projects selected were almost exclusively small in scale (between \$500 and \$7000). The deliberative sampling method lacked wide scope and lends itself to non-sampling errors.

### **Method 5: File Review and Interviews with Unfunded Applicants**

Files of 10 unfunded applicants were reviewed. Four unfunded applicants were interviewed.

#### Strengths

A mix of centers, years, provinces and themes were selected. Variation attempted to ensure comprehensiveness.

#### Weaknesses

While the ICBA receives approximately 60% of CVI funding, only 2 of 10 file reviews from unfunded applicants came from the ICBA. Moreover, the formative evaluation makes no mention of attempting to review documents from organization that vary in size. Only 4 interviews were undertaken with unfunded applicants. Attempted to accurately infer themes from a sample size of 4 is virtually impossible.

### **Method 6: Administrative Systems and Database Review**

Administrative systems and databases were reviewed through examining documents, interviews and follow up information requests.

#### Strengths

The administrative systems and database review incorporated multiple methods in order to effectively triangulate research results. Follow up information requests enhanced and enriched data that had been collected in previous interviews.

#### Weaknesses

Interviewees were sampled from the CCP and Centers in order to assess the adequacy of data monitoring and reporting indicators. A broader scope of sampling would produce more representative research.

## **Part B**

### **Proposal of Additional Methods to Increase Rigor and Comprehensiveness**

Several additional methods could be included in this evaluation in order to include its rigor and comparativeness.

1. A more thorough and comprehensive literature review is required in order to generate a more detailed picture of the CVI as it relates to volunteerism in general and public/voluntary sector cooperation. Such a literature review would incorporate academic articles and comparative studies of similar arrangements in other countries and jurisdictions.

2. A quantitative census interview of CVI partners and stakeholders would have provided much needed breadth and scope in order to complement the detail-rich findings of deliberative qualitative interviewing. Such a survey could be efficiently, quickly and cost effectively administered over the internet. This supplementary method would allow for the cross verification of themes in research results.
3. The scope of the file review process should have been broadened in order to include more mature and less mature organizations.
4. A quantitative census interview of all funding recipients would have provided a greater scope of information and reduced non-sampling errors associated with deliberative, qualitative sampling. Such a survey could easily be administered over the internet.
5. The file review process could be structured such that a greater proportion of reviewed files come from the ICBA. An effort could be made to review the files of unfunded organizations with a consideration to organization size. A greater number than 4 unfunded applicants could be interviewed.
6. In order to assess the adequacy of data monitoring systems, a cross section of organizations and stakeholders could be sampled; rather simply conducting a deliberative sample of CPP and Centre representatives.
7. In planning the evaluation, there could be more careful consideration to timing. Recognition of time constraints surrounding holidays and end of year pressures could ensure a better response and participation rate in the evaluation.

## **Part C**

### **Identification of Key Issues for the Summative Evaluation**

The summative evaluation will use a multi-method, evidence-based approach. Research will be done in collaboration with local and national participating organizations. This triangulation of methodology will ensure that findings are rigorous and comprehensive. The data collection tools incorporate quantitative and qualitative methods, as well as a review of literature and documents.

#### Data Collection Tools:

- Literature Review – an extensive review of studies on volunteerism and government and voluntary sector collaboration in national and international jurisdictions, as well as inclusion of Statistics Canada survey data
- Document Review – a review of data on participation and programs, from different levels of CVI and the funding recipients
- Volunteer Survey – an online questionnaire examining the experiences of clustered samples of volunteers within CVI funded organizations. Paper based questionnaires will be made available in regions of Canada that may not have access to the internet, and to volunteers who are not comfortable with online methods.

- Funding Recipient Survey – an online questionnaire will survey all CVI funded volunteer organizations. Paper based questionnaires will be made available to locations without access to the internet.
- Case Studies – a full review of five CVI funded volunteer organizations will be carried out. This will assess the application process, how funding affected the organization, and what changes were made to the organization in terms of volunteerism, capacity to meet community needs, and program and service delivery. This will demonstrate if CVI has increased the capacity of organizations to meet their needs.
- Key Informant Interviews – interviews of key personnel within the three national centres will be conducted. Select personnel will be interviewed from the thirteen local networks and from CVI funded organizations.

#### Limitations

- Obtaining required sample sizes and representation
- Timing and scheduling challenges of interviews
- Effectively identifying key informants with insight into the goals of the CVI

#### Ethical Considerations

- Confidentiality of all data will be maintained
- The identities of all respondents will be protected
- The anonymity of organizations participating in case studies will be preserved
- Findings will be presented in aggregate form

Evaluation Issues and Questions	Indicators (for Summative Evaluation)	Data Collection Method
1. Have volunteerism rates in Canada increased since the inception of the CVI?	<ul style="list-style-type: none"> <li>• Number of volunteers in Canada</li> <li>• Number of volunteer hours and hours per volunteer</li> <li>• Variety of volunteer activities</li> <li>• Rate of new volunteers</li> <li>• Extent of volunteerism across the demographic profile of region, official language, and ethnocultural community</li> </ul>	<ul style="list-style-type: none"> <li>• Literature Review</li> <li>• Volunteer Survey</li> </ul>
2. Has the CVI increased the capacity of voluntary sector organizations to provide programs and services?	<ul style="list-style-type: none"> <li>• Assessment of number and range of programs and services</li> <li>• Assessment of number of clients accessing programs and services</li> <li>• Key informants indicate number of new programs initiated due to evolving needs revealed during CVI research</li> </ul>	<ul style="list-style-type: none"> <li>• Document Review</li> <li>• Funding Recipient Survey</li> <li>• Key Informant Interviews</li> <li>• Case Studies</li> </ul>
3. Has the CVI increased the amount of volunteer contributions within voluntary sector organizations?	<ul style="list-style-type: none"> <li>• Key informant interviews report an increase in contribution of volunteers to the programs and services</li> <li>• Key informant interviews explain role of volunteers within their organization due to capacity building</li> <li>• Importance of volunteers within delivery of programs and services is assessed</li> </ul>	<ul style="list-style-type: none"> <li>• Volunteer Survey</li> <li>• Key Informant Interviews</li> <li>• Funding Recipient Survey</li> <li>• Case Studies</li> </ul>
4. Has the significance of volunteer roles within voluntary sector organizations been enhanced?	<ul style="list-style-type: none"> <li>• Key informants reveal increased reliance upon volunteers for operation of programs</li> <li>• Volunteer feedback indicates increased participation within organization</li> </ul>	<ul style="list-style-type: none"> <li>• Key Informant Interviews</li> <li>• Volunteer Survey</li> </ul>
5. Are volunteers satisfied with the quality of their experiences?	<ul style="list-style-type: none"> <li>• Volunteer survey explores satisfaction with role in voluntary sector organization</li> <li>• Level of participation in volunteer activities throughout Canada is determined</li> <li>• Feedback from volunteers reveal benefits from volunteering</li> </ul>	<ul style="list-style-type: none"> <li>• Document Review</li> <li>• Volunteer Survey</li> <li>• Key Informant Interviews</li> </ul>