

Canadian Evaluation Society, National Capital Chapter

Student Evaluation Case Competition 2007

First Round Case:

Formative Evaluation of the Canada Volunteerism Initiative

The Student Evaluation Case Competition is organized by the National Capital Chapter of the Canadian Evaluation Society. The organizing committee gratefully acknowledges the Department of Canadian Heritage for providing the information that underlies this case. The material is intended solely for educational purposes.

The members of the 2007 organizing committee are Marisa Meaker-Williamson, François Dumaine and Mike Goodyer.

Rules for the First Round of the Competition:

1. Teams may spend no more than five hours on the case. The document must be emailed either as an MS Word file or a WordPerfect file (preferably in a zip file format) to casecomp@evaluationcanada.ca and mgoodyer@rogers.com no later than 5.5 hours after organizers sent the case by email. For information on how to download and use winzip, please refer to the following website: <http://www.winzip.com/ddchomea.htm>
2. Submissions should be concise. Judges will look for quality, rather than quantity.
3. Judges must not know the real identity of the teams. Thus, throughout their submission, teams should identify themselves only by an imaginative, non-revealing code name, such as Noble Consultants.
4. In the e-mail message to which their submission is attached, teams must provide the following information. (This information will be removed when submissions are sent to the judges.)
 - a. Code name for the team
 - b. University or College of the team
 - c. School, Department or Program
 - d. Team Coach (if applicable)
 - e. Names of team members
5. Judges may take up to one month to select the best three submissions and draft feedback for all teams.

Judging Criteria for First Round Cases:

AREAS	CRITERIA	WEIGHTS
CONTENT	Overall understanding of evaluation findings	10
	Ability to identify strengths and weaknesses of the report	20
	Sound strategies to improve the evaluation report	20
	Sound recommendations for the summative evaluation	10
PRESENTATION	Clarity of presentation	10
	Organization of points (cohesive idea flow)	15
	Persuasive strength of argument	10
OTHER	At the discretion of judges, to award teams for ideas or detailed practical suggestions that go above and beyond the questions	5
TOTAL		100

February 10, 2007

First Round Team:

Thank you for participating in the 2007 CES Student Evaluation Case Competition!

The Director of Evaluation at Department of Canadian Heritage has requested a briefing note on the formative evaluation of the Canada Volunteerism Initiative completed in October 2005. The attached document contains the complete report. Specifically, the Director has requested a critical assessment of the formative evaluation to inform the design of the upcoming summative evaluation. Your briefing note should:

1. Critically analyze the evaluation's methodology identifying and assessing the strengths and weaknesses of each data collection method.
2. Propose additional methods that could have been implemented to increase the rigor and/or comprehensiveness of the evaluation.
3. Based on your analysis and additional methods, identify what you consider to be the five most important evaluation issues along with their associated indicators and data collection methods for the summative evaluation.

Please note: Your briefing note is limited to eight pages (including appendices), single line spacing, using Times New Roman font (12 size), with 1" margins all around.

We look forward to receiving your submission by e-mail later today.

Good luck!

Marisa, François and Mike
The 2007 CES Student Evaluation Case Competition Organizing Committee

FORMATIVE EVALUATION OF THE CANADA VOLUNTEERISM INITIATIVE

**Evaluation Services Directorate
Corporate Review Branch
Department of Canadian Heritage**

October 19, 2005

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List of Acronyms

ARAF	Accountability, Risk and Audit Framework
CPP	Community Partnerships Program
CSC	Community Support Centre
CVI:	Canada Volunteerism Initiative
EBP	Employee Benefit Plan
FTE	Full Time Equivalent
FY	Fiscal Year
G&C:	Grants and Contributions
GCIMS	Grants and Contributions Information Management System
GYSD	Global Youth Services Day
ICBA	Information, Capacity-Building and Awareness Centre
IYV	International Year of Volunteers
KDC	Knowledge Development Centre
LN	Local Network
NNVIO	Network of National Volunteer-Involving Organizations
NSGVP	National Survey of Giving, Volunteering and Participating
NVI	National Volunteerism Initiative
NTCB	Network, Training, and Capacity-Building
NVW	National Volunteer Week
O&M	Operating and Maintenance
PCH	Department of Canadian Heritage
PSAs	Public Service Announcements
RFP	Request for Proposal
RSF	Le Réseau communautaire de la société franco-manitobaine
SDC	Social Development Canada
SMC	Strategic Management and Coordination Committee
TOR	Terms of Reference
VSAD	Voluntary Sector Affairs Directorate
VSI	Voluntary Sector Initiative
YAC	Youth Advisory Committee

Executive Summary

Introduction

The objective of the formative evaluation is to provide the Department of Canadian Heritage (PCH) with an evidence-based assessment of the design and delivery of the Canada Volunteerism Initiative. A secondary objective was to verify progress towards the achievement of outcomes. The evaluation covered the period from June 2002 to March 2005.

Profile of the Canada Volunteerism Initiative

The Canada Volunteerism Initiative (CVI) was approved in June 2002 and housed within the Community Partnerships Program (CPP) of the Department of Canadian Heritage as a legacy of the 2001 International Year of Volunteers. As the CVI was the first ongoing program to come out of the Voluntary Sector Initiative, its creation was heavily influenced by the principles of the *Accord Between the Government of Canada and the Voluntary Sector*. In practical terms, this meant that the CVI was jointly designed and developed by representatives from both the voluntary sector and the federal government.

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 Initiative's programs and services are delivered by three national centres through contribution agreements (totalling \$35M over the five years). These centres are:

- The Knowledge Development Centre (KDC) (\$6.2M), which provides support for both local and national research to improve Canadians' understanding of volunteerism;
- The Information, Capacity-Building and Awareness Centre (ICBA) (\$21M), which is responsible for the development of local and national networks; administers a resource centre, an awareness campaign, a capacity-building program; and
- The Community Support Centre (CSC) (\$7.7M), which provides support for local organizations to develop and test innovative methods for sustaining volunteerism.

Each of the national centres has a unique set of objectives that link to the CVI objectives. The Community Partnerships Program (CPP) Directorate, within the Citizenship Participation and Promotion Branch of the Citizenship and Heritage Sector, has managed the Initiative since its inception in 2002-03.

A Strategic Management and Coordination Committee has been established to provide overall leadership, coordination and oversight of the CVI. The Committee usually composed of nine members, is co-chaired by Volunteer Canada, on behalf of the voluntary sector, and CPP, on behalf of the Government of Canada. The role of the SMC has been traditionally operational,

making decisions regarding local host organizations, reviewing and providing feedback on plans, and hosting the annual SMC Forum.

Evaluation Methodology

The formative evaluation examined the following evaluation 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?

The evaluation was based on multiple lines of evidence, including:

- Document review;
- Key informant interviews (n=17) with program personnel at PCH, national centres, local network coordinators and committee representatives;
- Key informant interviews or group interviews (n=23) with local network members and local network host organizations;
- File review of 39 funding recipients for all three centres;
- Interviews (n=16) with funding recipients for all three centres;
- File review of 10 unfunded applicants for all three centres and interviews (n=4) with a selection of unfunded applicants for whom files were reviewed; and,
- Administrative systems and databases review, including a document review and interviews.

Findings and Conclusions

Design

- The CVI rationale is well defined and understood by all those interviewed, including funding recipients of the various national centres. The interviews and national centre work plans also provide ample evidence that the program logic is sound and that the activities being undertaken can be plausibly expected to lead to the desired outcomes.
- However, the CVI is reaching a point where some alterations in program design might be appropriate. The area of redesign that received the most support would involve a refocus of efforts towards integrating project results into organizational practice. Other areas noted as requiring support include increasing the independence and capacity of local networks and increased efforts in the area of knowledge management.

Delivery and implementation

- *Delivery approach.* The decentralized delivery approach of the CVI was found to be generally sound and considered effective by respondents. Positive feedback was received regarding the management and communications for CVI on the part of CPP and national

centres. No obvious alternatives were identified that could achieve the outcomes in a more cost-effective manner.

- *Governance.* While the CVI's governance mechanisms are viewed as appropriate, interviewees identified the need for the SMC to play a more strategic, rather than operational, role. Improvements in communications and information sharing were also called for *between* the CVI's various administrative, decision-making and advisory bodies.
- *Partnership between government and voluntary sector.* Government representatives believe that the CVI represents a unique partnership approach to programming, which recognizes the contribution of the voluntary sector. Most voluntary sector respondents were quick to point out that the CVI had resulted in a unique and collaborative relationship with the Government. However, they also tended to question whether a true partnership could ever be possible between a funder and funding recipient.

Progress towards the achievement of results

- The evaluation found evidence that progress is being made towards the achievement of activities, outputs and immediate outcomes in all key program areas, albeit with some lags in dissemination and knowledge transfer.
- For example, fourteen networks have been established (one at the national level and one in each province and territory). Promotional activities developed to date include promotional campaigns, media interviews and conference presentations. Research and pilot activities have been supported via the identification of key themes, the funding of projects, and the receipt and review of reports/tools.
- While it is generally too early to make conclusive statements about progress towards the achievement of intermediate and ultimate outcomes, 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. That is because: a) the CVI Accountability Framework was just developed and implemented early in 2004-05; and b) national centres are currently introducing changes in their reporting procedures.
- CPP respondents recognized the need for an electronic database to facilitate gathering, synthesizing and reporting of results for the Initiative for monitoring and evaluation purposes. Concerns were raised that existing report formats make the rolling-up and accessibility of data pertaining to overall CVI outputs and outcomes difficult and time consuming.

Recommendations and Management Response

The evaluation makes four recommendations, as follows:

1. CPP should work with other members of the Strategic Management and Coordination Committee (SMC) to strengthen the strategic governance role of the committee.

The role of the SMC in the overall management and direction of CVI should be considered in light of the fact that the Initiative is in its fourth year. In particular, there is an opportunity for the SMC to shift from their traditionally operational focus to a more strategic one (e.g., consideration of the influence of national volunteerism trends on CVI and vice versa, development of an annual statement on volunteerism, taking a long-term focus for the future of CVI, encouraging dialogue amongst CVI administrative, decision-making and advisory bodies).

Management Response: Recommendation accepted.

Following a discussion at the September 15, 2005, meeting of the SMC, it was agreed that the committee should be more strategic in its focus. The first opportunity to change this focus will be in November when the SMC will develop a Strategic Plan for the CVI.

At the beginning of the CVI, it was necessary for the SMC to be a decision-making body in order to facilitate the creation of various elements of the CVI. That stage has passed and the SMC has agreed that its role needs to be focused on setting the strategic direction of the CVI. To start, the SMC will develop a strategic plan that will outline how best to achieve the expected results of the CVI; how to position the CVI so that it is recognized as a key contributor to communities; how the CVI should respond to trends in volunteerism and to issues faced by volunteer-involving organizations; and how best to share information among CVI stakeholders and committees.

Implementation Schedule: November 28, 2005 - Develop a CVI Strategic Plan, in consultation with other CVI stakeholders and ongoing.

2. CPP should undertake consultations with its key stakeholders with a view to developing possible program design alterations.

It is recommended that consultations be undertaken that include representatives from the national centres, local network host organizations, local network coordinators, and local network members, national centre advisory committee members, SMC members, and CPP. Other outside organizations could also be consulted. Potential areas of focus for the consultations may include implementing a mechanism that supports voluntary sector organizations' use of research and tools developed through CVI-funded projects, strategies for knowledge transfer/management, and evolving roles for local networks.

Management Response: Recommendation accepted.

The design of the CVI is built around consultation and exchange of ideas. This practice has already resulted in changes to the program, such as the revision in the strategy of the Knowledge Development Centre which has become more focused on the transfer of knowledge as opposed to the dissemination of reports. For example, due to feedback from the local networks, the Centre

has concentrated on making information more accessible both in format and in language. This work will continue via planned consultations with researchers. Another example would be the decentralization of capacity funds to local networks by the Information, Capacity Building and Awareness Centre. CPP will continue to work with all three national centres, the 13 local networks and the National Network of Volunteer-Involving Organizations. The SMC and other key stakeholders are to discuss and develop possible program design alterations.

CPP consulted with its stakeholders on a regular basis and, as a result of this work, implemented changes to the program design of the CVI. In the fall and winter of 2005-06, CPP will undertake a series of consultations to discuss possible changes in the three areas outlined in the formative evaluation and any proposed changes coming out of the strategic planning meeting of the SMC.

Implementation Schedule: CPP will be consulting stakeholders regarding program design alterations in preparation for program renewal in 2007 and ongoing.

3. CPP should design an electronic database that will facilitate data gathering, synthesis and reporting of results for CVI.

Ideally, an electronic (e.g., Web-based) database would be developed that is accessible to local network hosts and coordinators (for the purposes of data entry and basic reporting capabilities), and CPP and national centres (for the purposes of data entry and advanced reporting capabilities). All appropriate financial data and results indicators could be provided to national centres and CPP through this mechanism.

Management Response: Recommendation accepted with modification.

CPP will work with its key stakeholders to improve data gathering, though not necessarily via the creation of a Web-based electronic database.

CPP currently gathers much of its data in electronic format via quarterly reports from the national centres, which in turn have gathered data from the local networks. These reports, presented via a reporting table, have been submitted over the past year. The program will now dedicate resources to compiling information from these reports to create an amalgamated annual report. There are three challenges in the creation of an electronic database for the CVI. The first is that there is a lack of technological capacity in some regions, particularly in the North, to access an electronic database. Secondly, the Initiative has little requirement to manipulate quantitative data in order to monitor progress toward results; much of the data collection will be qualitative in nature. For example, the progress of the Nunavut local network in official language outreach is not readily comparable with that of Manitoba local network as each start from an entirely different base. Thirdly, the local networks are third party recipients managed by Volunteer Canada and it would be inadvisable for Canadian Heritage to ask local networks to utilize a departmental data gathering system if it wishes to protect its arms length relationship.

Implementation Schedule: November 2005 - Start process.

4. CPP should continue to work with the national centres to ensure adequate ongoing monitoring, reporting and assessment of CVI activities, outputs and outcomes.

While the formative evaluation found that centres are reporting on the indicators identified in the Accountability Framework, reporting templates continue to be adjusted as the national centres receive feedback from users. Thus, CPP should continue to work with national centres to ensure that the reporting templates continue to meet the needs of the Department. As well, in preparation for the summative evaluation, CPP should ensure that appropriate existing data sources for performance indicators pertaining to outcomes that were not a main focus of the formative evaluation (e.g., intermediate outcomes related to increased awareness, understanding and organizational capacity) are in place for the summative evaluation.

Management Response: Recommendation accepted.

This has been, and will continue to be, a major activity for CPP.

CPP meets regularly with all national centres representatives to discuss all issues related to CVI, including reporting on results. It is the intent of CPP to continue to work closely with the national centres and all key CVI stakeholders to ensure ease of reporting.

Implementation Schedule: Ongoing.

1.0 Introduction

This document presents the final report of the *Formative Evaluation of the Canada Volunteerism Initiative* (CVI), an initiative of the Department of Canadian Heritage (PCH). The objective of the evaluation was to provide PCH with an evidence-based assessment of the design and delivery of the Canada Volunteerism Initiative (CVI). A secondary objective was to verify progress towards the achievement of outcomes. The evaluation covered the period from June 2002 to March 2005.

1.1 Organization of the Report

This report contains three sections:

- Section 1, including an overview of the objectives of the evaluation, a profile of the CVI, and a description of the methodology;
- Section 2, presenting findings related to design, delivery and implementation, evidence of progress towards outcomes achievement, and performance measurement strategy and practice; and
- Section 3, providing integrated conclusions and recommendations.

Annexes to the report include a description of the CVI delivery approach (Annex A), the CVI logic model (Annex B), the CVI evaluation matrix (Annex C), and a list of interviewees and files reviewed (Annex D).

1.2 Profile of the Canada Volunteerism Initiative

1.2.1 Volunteerism in Canada

Canadians have a rich history of volunteering and community involvement that makes volunteerism part of Canada's way of life. Volunteers make considerable and meaningful contributions to their communities, strengthening the fabric of Canadian society and the capacity of charitable and voluntary organizations.

In 2001, the Canadian Centre for Philanthropy conducted an environmental scan¹ in order to examine the state of volunteerism in Canada and public attitudes towards volunteering. The scan indicated that volunteerism is a valuable activity in Canadian society and provides benefits to both volunteers and the charitable organizations that rely on them. However, it also revealed that fewer Canadians are performing volunteer work and only about 8% of all Canadians contribute to the 72% of the volunteer activities undertaken.

The National Survey of Giving, Volunteering and Participating (NSGVP, 2000) identified important trends in volunteerism in Canada based on the changes between 1997 and 2000. This

¹ Hall, Michael; McKechnie, A-J; Davidman, Katie; Fleur, Leslie. (2001). An Environmental Scan on Volunteering and Improving Volunteering. Canadian Centre for Philanthropy.

survey produced similar findings, with the most significant changes², noted as being:

- A decline in the number of Canadians who volunteer: just over 6.5 million in 2000 compared to nearly 7.5 million in 1997.
- An increase in the number of hours contributed per volunteer: the 27% of Canadians who volunteered in 2000 contributed more hours on average than in 1997 (162 versus 149).
- Much continues to come from the few: over one third (34%) of all volunteer hours were contributed by 5% of volunteers. This means that less than 7% of all Canadians account for almost three quarters (73%) of all volunteer hours.

The 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 Canadian society.

Accordingly, through the Voluntary Sector Initiative (VSI), the Government of Canada took action to revitalize the voluntary sector and approved \$94.6M in funding for this Initiative in June 2000. The main goal of the Initiative is “to strengthen the voluntary sector’s capacity to meet the challenges of the future and to enhance the relationship between the sector and the federal government”³. Its key objectives are to build the voluntary sector’s capacity to (a) meet the requirements of Canadian society and (b) improve government policies and programs as well as services for Canadians.

The VSI created seven joint tables. The National Volunteerism Initiative Joint Table, with a mandate to develop proposals to support and foster volunteerism in Canada, issued a report with recommendations that were used by the joint voluntary sector and government working group that designed the implementation of CVI. The program was announced in December 2001. In order to select those organizations that would manage the three national centres, a Request for Proposals was sent out in late June 2002. The successful applicants were announced by then Minister Sheila Copps in December 2002. The CVI represents the first ongoing program to be implemented under the broader Voluntary Sector Initiative.

1.2.2 Objectives of the Canada Volunteerism Initiative

The Canada Volunteerism Initiative (CVI) was approved in June 2002 and housed within the Community Partnerships Program (CPP) of the Department of Canadian Heritage as a legacy of the 2001 International Year of Volunteers. As the CVI was the first ongoing program to come out of the Voluntary Sector Initiative, its creation was heavily influenced by the principles of the *Accord Between the Government of Canada and the Voluntary Sector*⁴. In practical terms, this meant that the CVI was jointly designed and developed by representatives from both the voluntary sector and the federal government. The CVI’s objectives are to:

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

² McClintock, Norah. (2004). “Understanding Canadian Volunteers: Using the National Survey of Giving, Volunteering and Participating to Build Your Volunteer Program”. Canadian Centre for Philanthropy, p. 3.

³ Social Development Canada. (2004). The Voluntary Sector Initiative Process Evaluation, p. i.

⁴ CVI Accountability, Risk and Audit Framework (ARAF), December 2004. Page 2.

- 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.

1.2.3 Roles and Responsibilities/Governance

Community Partnership Program

The Community Partnerships Program (CPP) Directorate of PCH has managed the CVI since its inception in 2002-03. CPP, within the Citizenship Participation and Promotion Branch of the Citizenship and Heritage Sector of PCH, has held responsibility for supporting the growth and diversity of the voluntary sector in Canada and for enhancing the financial self-sufficiency of voluntary organizations for over 30 years.⁵ The CPP had a co-lead role in delivering the IYV (2001), managed a number of contribution agreements related to the Voluntary Sector Initiative (VSI), supported the National Volunteerism Initiative (NVI) Joint Table, and provided strategic and policy advice in support of the development of the CVI. CPP also participates in the design and development of research studies related to volunteerism and participation and the Program also promotes volunteerism and volunteering within the Government of Canada.

In the context of the CVI, CPP is responsible for signing third-party contribution agreements with three national centres, ensuring the national centres fulfill the terms of their contribution agreements, report to PCH and central agencies regarding the CVI's performance, liaise with national centres to interpret the requirements in the contribution agreements and otherwise assist as appropriate with the delivery of CVI at the national centres. The Director of CPP co-chairs the Strategic Management and Coordination Committee (SMC).

Volunteer Canada

Volunteer Canada manages two of the three CVI centres: the Community Support Centre (CSC); and the Information, Capacity-Building and Awareness Centre (ICBA) (see Section 1.2.4 for more details on these centres).

In addition to the management of these two centres, the President of Volunteer Canada co-chairs the Strategic Management and Coordination Committee.

Imagine Canada

Imagine Canada (formerly the Canadian Centre for Philanthropy⁶) manages and administers the Knowledge Development Centre (KDC). As articulated in Imagine Canada's contribution agreement with PCH, the KDC is responsible for developing and delivering knowledge development projects, including:

⁵ Ibid. Page 1.

⁶ Imagine Canada resulted from the merging of the Canadian Centre for Philanthropy and the Coalition of National Voluntary Organizations (NVO) in February 2005.

- The development and delivery of a third-party funding program (via grants) for local organizations to conduct local research as well as analysis of trends, approaches, research and policies related to volunteerism; and,
- The conduct of national research and analysis as well as the funding of third parties (via grants) for the conduct of national research, trend analysis, approaches, research and policies related to volunteerism.

In addition, Imagine Canada assists Volunteer Canada with the development of the monitoring and reporting component and helps the Community Support Centre to guide the evaluation methodology used by their funding recipients. A representative of Imagine Canada also sits on the Strategic Management and Coordination Committee.

Local Networks

Local networks are funded via ICBA. Volunteer Canada signs contracts with local host organizations who have responsibilities to:

- Deliver certain elements of the CVI within their province/territory;
- Pay for and administer costs related to the Local Network (including contract costs, rent, communications, meeting administration, translation, equipment);
- Make recommendations as to potential members of and pro-actively seek the involvement of a diverse representation of sub sectors and population groups in the Local Network;
- Administer all meetings of the Local Network (teleconferences, in person);
- Customize the tools and templates provided by Volunteer Canada to meet the needs of administering the Local Network;
- Provide Local Network members with tools and resources relating to the Canada Volunteerism Initiative;
- Coordinate and support input and information required from the Local Network to the Knowledge Development and Community Support Centres of CVI;
- Work with Volunteer Canada and other host organizations to conceive and deliver targeted volunteer development programming;
- Manage work as ascertained by the Local Network, specifically overseeing the organization of workshop(s) or symposia, locally based research or report preparation and facilitating meetings;
- Coordinate with Volunteer Canada as required to keep relevant parties informed;
- Acknowledge sponsors in all promotional materials, media and official handouts used for the host organization and the local networks; and,
- Submit detailed activity reports and financial statements to Volunteer Canada.

Host organizations in turn contract or assign a staff member to act as local network coordinators. The coordinators are responsible for undertaking many of the activities listed above (e.g., establishing and communicating with the Local Network, providing local network members with tools and resources relating to the CVI, coordinating and supporting input and information to KDC and CSC, work with others to conceive and deliver targeted volunteer development programming).

Committees

The SMC provides overall leadership, coordination and oversight of the CVI.⁷ The Committee normally has nine members and is co-chaired by Volunteer Canada, on behalf of the voluntary sector, and CPP, on behalf of the federal government. Including its co-chairs, members include representatives from the voluntary sector (including two national centre representatives, a representative from another national organization, and three local network representatives) and representatives from the federal government (two from PCH, as well as one from Social Development Canada (SDC)). The role of the SMC has been traditionally operational, making decisions regarding local host organizations, reviewing and providing feedback on plans, and hosting an annual SMC Forum.

KDC and CSC each have a National Advisory Committee that assist with the selection of research/ project themes and projects to be funded. Volunteer Canada administers the CSC National Advisory Committee and Imagine Canada administers the KDC National Advisory Committee. Committee members include national centre representatives (i.e., from Volunteer Canada or Imagine Canada) and a representative from each local network. The CSC Advisory Committee also includes representation from Volunteer Centres. Membership can vary from year to year as some local networks rotate their representatives on the committees.

The Network of National Volunteer-Involving Organizations (NNVIO) is a committee composed of national voluntary sector organizations. The NNVIO acts as a national-level network. The Youth Advisory Committee (YAC) is an advisory body to Volunteer Canada. The role of this committee is still being formalized. In the past, the committee has provided feedback on awareness campaigns.

1.2.4 Delivery Approach and Mechanisms

The CVI's key activities are to:

- Develop and conduct promotional activities;
- Support research and pilot/demonstration projects;
- Collect/develop/disseminate resources and transfer knowledge;
- Create and support networks; and
- Manage, monitor and report.

The CVI Logic Model (Annex B) illustrates how the key CVI activities are expected to lead to the intended ultimate outcomes of the Initiative through linked outputs and immediate and intermediate outcomes.

To achieve the CVI objectives, three national centres and thirteen local networks (one in each province and territory) were established. Through contribution agreements with PCH (\$35M over five years), the three national centres oversee the delivery of a range of programs and services related to volunteerism, as follows⁸:

⁷ CVI Accountability, Risk and Audit Framework (ARAF), December 2004. Page 4.

⁸ Please refer to Annex A for a graphical depiction of the delivery approach for CVI.

- The Knowledge Development Centre (KDC) (\$6.2M) provides support for both local and national research to improve understanding of volunteerism through a contribution agreement with Imagine Canada.
- The Information, Capacity-Building and Awareness (ICBA) Centre (\$21M) administers a resource centre, an awareness campaign, and a capacity-building program through a contribution agreement with Volunteer Canada.
- The Community Support Centre (CSC) (\$7.7M) provides support for local organizations to develop and test innovative methods for sustaining volunteerism through a contribution agreement with Volunteer Canada.

Each of the *national centres* has a unique set of objectives which link to the CVI objectives.

The KDC's objectives are to:

- Build upon the body of knowledge on volunteers and volunteerism in Canada; and to
- Promote the effective transfer of the knowledge that is developed to voluntary organizations to assist them with their work.

The KDC provides grants for community-based and national research projects related to volunteerism. Each year, the KDC establishes research themes in consultation with local networks and the National Advisory Committee for the Centre. An annual RFP process is launched seeking letters of interest from national and local organizations for projects that are consistent with the research themes for that year. Short-listed research projects are invited to submit a complete proposal. Local networks review proposals and each network puts forth three proposals for consideration by the National Advisory Committee for the KDC. Successful projects are funded by, administered, supported and overseen by KDC staff at Imagine Canada. KDC also undertakes a number of knowledge transfer activities, including the development and maintenance of a Web site; the review and distribution of research reports and other tools (e.g., fact sheets); and promotional activities, including media interviews.

The CSC aims to:

- Foster the development of volunteerism by carrying out pilot and demonstration projects.

The CSC provides grant funding to third-party organizations to carry out pilot and demonstration projects that develop and test innovative methods and models for encouraging, sustaining, and supporting volunteerism. Each year, the CSC establishes project themes in consultation with local networks, NNVIO and volunteer centres. An annual RFP process is launched seeking proposals from organizations for projects that are consistent with the themes for that year. Proposals are reviewed by local networks and each network puts forth three proposals for consideration by the National Advisory Committee for the CSC.

Successful projects are funded by, administered, supported and overseen by CSC staff at Volunteer Canada. The Centre is also committed to ensuring that the results of successful projects are made available to voluntary organizations across the country through targeted dissemination and posting of the materials on the Volunteer Resource Centre Web site.

ICBA has the following objectives:

- Encourage voluntary organizations to commit resources and energies toward volunteer programming; and
- Create consensus on best practices and strategic directions in volunteering in order to lever both resources and change within organizations and across jurisdictions.

ICBA activities are broken into four main areas:

- Information Clearinghouse (also known as the Volunteer Resource Centre), which provides on-line, in-person, and telephone information services on volunteerism, including tools, best practices, and research;
- Outreach and Awareness, which promotes the nature and benefits of volunteerism through public service announcements, posters, brochures, editorial media content and promotion and outreach activities for key events related to volunteerism – this area includes funding and administration for three annual campaigns, including National Volunteer Week, Global Youth Services Day and December 5th – International Volunteer Day;
- Networking, Training and Capacity-Building, which provides voluntary sector organizations with training and capacity-building resources and opportunities in areas such as board development and volunteer management as well as facilitates local and national networking opportunities for voluntary sector organizations (administration for this component was largely transferred to local networks after the 2003/04 fiscal year); and,
- Local Network Administration, which identifies and funds host organizations within each province or territory to provide operational support to each of the local networks.

1.2.5 Resources and Expenditures

Exhibits 1.1 to 1.5 below show 2004-05 expenditures for CPP, KDC, CSC and ICBA.⁹ Operating and maintenance (O&M) expenses (for CPP) and operating expenses (for centres) include all other operational and maintenance expenses including knowledge transfer activities¹⁰.

A couple of general observations on the exhibits include the following (More explanatory details are provided in Box 1, below):

- Most budgets and expenditures for CPP and the centres have tended to increase over time (mostly due to increasing G&C components). According to CPP, this trend is indicative that the first year of a program or initiative entails a great deal of set-up and organization, with a relatively small amount of time and dollars devoted to third-party funding/projects. As well, implementation of the CVI (i.e., signing of contribution agreements with national centres) did not begin until September 2002 and thus funding for the 2002-03 fiscal year was reduced and

⁹ Figures for 2002-2003 are for September 2002 to March 2003, except for KDC where the figures are for November 2002 to March 2003.

¹⁰ Operating expenses (for centres) and Operating and Maintenance expenses (for CPP) include the following: Communication, Facilities and Rentals, Finance Costs, Professional Services (Accounting, Audit, Professional Services), Information, Office Equipment, Office Supplies and Equipment, Rent and Maintenance, Special Projects, and Travel and Accommodation.

funding gradually increased as the Initiative matured and more of the infrastructure, processes and mechanisms were in place.

- All centres (especially KDC) have usually realized lower actual expenditures on grants and contributions than budgeted. A CPP representative explained that some funding was lapsed, due to the late start of CVI in 2002-03 (in particular for KDC) and the complexity of the CVI delivery model. In addition, due to a high level of diligence on the part of the national centres with respect to reporting requirements and the focus on achieving results, activities within a given fiscal year were often delayed and therefore could not be expensed as planned. This often caused lapses in funding.

Box 1: Notes to Financial Data

The amount designated as the CPP CVI grants and contributions budget represents the reference level, or original budget, forecast at the beginning of each fiscal year. These allocations are not static: over the course of each year, they change. The allocations are affected by reductions such as reprofiling of funds from one year to the next; Annual Reference Level Updates; transfers to other programs; or allocations to corporate initiatives or reallocations. They are also affected by the injection of additional funds such as when funds are transferred from another program.

For consistency and comparability purposes, the budget figures for the national centres also represent the original budget forecast at the beginning of the fiscal year (i.e., not adjusted for in-year reallocations). These changes to the original allocations explain several apparent discrepancies, as follows:

- *The Gs&Cs amount budgeted in the CPP/CVI original budget does not equal the total of the budgets forecast by the national centres (Exhibits 2 to 4) because the centres based their budgets on figures either at the beginning of or during the exercises outlined above. That is, the centres based their budgets on figures that were different from the original allocation.*
- *Reductions to the allocations explain why CPP actual expenditures may be lower than the original budgeted figures for both CPP and the centres: the amount spent may have been lower than originally allocated and budgeted for, resulting in less actual expenditures than budgeted, for both CPP and the centres. Similarly, CPP Gs&Cs actual expenditures (the funding that is advanced to the national centres) may be lower than the total budgeted figures for the centres due to reductions in allocations: the allocation upon which the original budgets were forecast may have been reduced during the course of the year, resulting in less available funds, less funds advanced and less funds spent (lower CPP actual Gs&Cs expenditures).*
- *Additional funds transferred to the program explain why total actual expenditure figures are sometimes greater than total budget figures. For example, in the case of ICBA for 2004-05, the Centre was advanced additional funds to manage the SMC annual forum and to implement the Official Languages strategy.*
- *Transfers within categories explain why actual expenditures are sometimes greater than original budget figures forecast for one of the categories as opposed to the total budget or total actual expenditure. For example, while a given amount may have been planned to be spent in operating expenses, it may have been reduced to spend more on salary within a given year. This would result in more actual expenditure in operating expenses than originally planned and less actual expenditure in salary; this does not affect total actual expenditure for the centre. These form part of normal adjustments that occur with all programs/initiatives.*
- *Unspent or lapsed funds within a given year explain the deviation between funds advanced (in the CPP/CVI Gs&Cs actual expenditures in Exhibit 1) and the totals of actual expenditures noted for all national centres. That is, the national centres' total expenditures may be less than the funds advanced by CPP because not all funds advanced were spent.*

Exhibit 1.1: Community Partnerships Program (CPP) at PCH CVI Budgets and Actual Expenditures

	2002-2003			2003-2004			2004-2005		
	Budget	Actual Expenditures	FTEs	Budget	Actual Expenditures	FTEs	Budget	Actual Expenditures	FTEs
Salary	\$881,075	\$822,750		\$881,075	\$771,964		\$881,075	\$581,203	
O&M	\$328,617	\$114,068		\$433,617	\$222,142		\$433,617	\$177,659	
Grants & Contributions	\$4,508,170	\$4,033,948		\$7,403,170	\$6,818,628		\$7,403,170	\$7,824,199	
Total *	\$5,717,862	\$4,970,766	8	\$8,717,862	\$7,812,734	6.74	\$8,717,862	\$8,583,061	7.65

Source: Excel Spreadsheet from Corporate Administration at PCH sent via CPP. Note that figures in this exhibit represent the CVI portion of the CPP budget, expenditures and FTEs only. Figures do not include expenses related to Employee Benefits Plan (EBP)

* Regarding calculation of the FTEs, figures above do not include CPP FTEs that worked on matters not related to the CVI (e.g., those hired to staff the Voluntary Sector Affairs Directorate (VSAD) in support fo the Voluntary Sector Initiative or other CPP

Note: See important notes on preceding pages of Section 1.2.5.

Exhibit 1.2: CSC Budgets and Actual Expenditures

	2002-2003		2003-2004		2004-2005	
	Budget	Actual Expenditures	Budget	Actual Expenditures	Budget	Actual Expenditures
Salary	\$74,770	\$46,896	\$99,570	\$81,134	\$124,055	\$127,767
Operating*	\$234,001	\$264,747	\$499,127	\$583,445	\$565,642	\$553,877
Grants**	\$683,027	\$402,409	\$1,030,000	\$848,195	\$939,000	\$761,587
Total	\$991,798	\$714,052	\$1,628,697	\$1,512,774	\$1,628,697	\$1,443,231

Source: Excel Spreadsheet from Volunteer Canada sent via CPP.

* Note that in 2002-03, \$150,000 of CSC operating expenses were for program activities undertaken by Imagine Canada. Similarly, in 2003-04 and 2004-05, \$350,000 of CSC operating expenses were for knowledge transfer activities undertaken by Imagine Canada.

** CSC issues grants for pilot and demonstration projects, as well as special projects.

Note: See important notes on preceding pages of Section 1.2.5.

Exhibit 1.3: KDC Budgets and Actual Expenditures

	2002-2003		2003-2004		2004-2005	
	Budget	Actual Expenditures	Budget	Actual Expenditures	Budget	Actual Expenditures
Salary	\$155,381	\$167,907	\$194,801	\$208,233	\$222,167	\$216,539
Operating	\$305,470	\$251,343	\$258,853	\$225,925	\$318,326	\$332,256
Grants*	\$282,131	\$267,029	\$878,888	\$461,482	\$1,176,590	\$801,785
Total	\$742,982	\$686,279	\$1,332,542	\$895,640	\$1,717,083	\$1,350,580

Source: Excel Spreadsheet from Imagine Canada sent via CPP.

* KDC issues grants for research projects (including grants from KDC to Imagine Canada for national research).

Note: See important notes on preceding pages of Section 1.2.5.

Exhibit 1.4: ICBA Budgets and Actual Expenditures

	2002-2003		2003-2004		2004-2005	
	Budget	Actual Expenditures	Budget	Actual Expenditures	Budget	Actual Expenditures
Salary	\$625,576	\$489,195	\$1,162,602	\$1,084,770	\$1,162,996	\$1,183,356
Operating	\$1,034,447	\$1,069,563	\$1,435,588	\$1,153,309	\$1,229,512	\$1,354,386
Grants & Contributions*	\$639,146	\$549,998	\$2,249,400	\$1,986,603	\$2,249,400	\$2,365,491
Total	\$2,299,169	\$2,108,756	\$4,847,590	\$4,224,682	\$4,641,908	\$4,903,233

Source: Excel Spreadsheet from Volunteer Canada sent via CPP.

* ICBA signs contracts with host organizations for the administration/delivery of local networks. ICBA and local network host organizations issue grants for networking, capacity-building and training activities.

Note: See important notes on preceding pages of Section 1.2.5.

Exhibit 1.5: 2004/05 Actual Expenditures for ICBA Components*

	Information Clearinghouse	Local Networks	Outreach & Awareness	NTCB**
Salary	\$605,778	\$42,135	\$368,627	\$166,816
Operating	\$420,294	\$136,530	\$319,243	\$478,319
Grants & Contributions***	\$0	\$979,379	\$0	\$1,386,112
Total	\$1,026,072	\$1,158,044	\$687,870	\$2,031,247

Source: Excel Spreadsheet from Volunteer Canada sent via CPP

*Only 2004-05 figures are presented since ICBA activities and related processes were still being established in previous years (e.g., not all networks were established prior to 2004-05) and numbers for those years would not be as meaningful or representat

**NTCB = Networking, Training and Capacity-Building and includes funding to organize and support attendance at SMC and network meetings, expenses related to performance measurement, and grants to organizations to undertake projects.

***The entire dollar amount for local networks includes contributions provided to host organizations. The entire dollar amount for NTCB includes grants to community organizations to undertake projects related to networking, training and capacity-building.

Note: See important notes on preceding pages of Section 1.2.5.

1.3 Methodology

This section describes the evaluation questions, lines of evidence, challenges encountered and methodological constraints.

1.3.1 Evaluation Issues and Questions

The formative evaluation examined the following evaluation 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?

Annex C presents the evaluation matrix, including the five evaluation questions, indicators, and lines of evidence used to address the questions.

1.3.2 Lines of Evidence

The evaluation was based on multiple lines of evidence, including:

- Document review;
- Key informant interviews (n=17) with program personnel at PCH, national centres, local networks coordinators and committee representatives;
- Key informant interviews or group interviews (n=23) with local network members and local network host organizations;
- File review of 39 funding recipients for all three centres;
- Interviews (n=16) with funding recipients for all three centres;
- File review of 10 unfunded applicants for all three centres and interviews (n=4) with a selection of unfunded applicants for whom files were reviewed; and
- Administrative systems and databases review, including a document review and interviews.

The methodology for each line of evidence is described below.

Document Review. This component involved the review and analysis of documentation pertaining to the CVI and volunteerism issues more generally as they correspond to the evaluation questions and indicators. The purpose of this review was to draw on existing documents (such as plans, funding agreements, activity reports, and centre evaluation reports) to address the evaluation issues.

Key Informant Interviews. In-person and telephone interviews were conducted with 17 key informants from across Canada. In addition, eight one-on-one or group interviews were conducted with network members and host organization representatives, as follows:

- Managers at PCH headquarters (n=2);
- The heads of National Centres (n=2);
- Local network coordinators (n=5);
- Representatives of the Community Support Centre (CSC) and Knowledge Development Centre (KDC) National Advisory Committees (n=2);
- One representative from the Network of National Volunteer-Involving Organizations (NNVIO);
- Representatives from the Strategic Management and Coordination Committee (SMC) (n=3);
- Representatives from Social Development Canada (SDC) (n=2);
- Members of local networks participating in group or one-on-one interviews (n=19 via four group interviews and two one-on-one interviews); and
- Representatives of local network host organizations participating in group interviews (n=4 via two group interviews).

The TOR dictated the selection of interview types and CPP guided the identification of specific individuals. The evaluators selected committee members based on their longevity, level of knowledge, and engagement in committee activities. Local networks were selected on the basis of the longevity, their local network coordinator, and the maturity of the network as judged by CPP representatives.

The interviews were completed between February 10 and March 9, 2005 (see Annex D). Site visits were conducted for interviews with local network coordinators and/or host organizations in Moncton, Montréal, Toronto, Edmonton, and Yellowknife.

File Review of Funding Recipients. Documentation for a total of 39 funding recipients was received and reviewed. Files for five different kinds of funding recipients were reviewed:

- National centres (n=3);
- Host organizations (n=6);
- KDC funding recipients (n=10);
- CSC funding recipients (n=10); and,
- ICBA capacity-building funding recipients (n=10).

The TOR dictated the number of files of each type to be reviewed. The selection of specific files was done by the evaluators. For the host organizations, files were chosen for six of the networks that were not being visited as part of the key informant interviews in order to minimize the burden on those networks. Other files were selected with a view to achieving a mix of provinces, funding years, funding amount, and themes (see Annex D).

National centre documents reviewed included contribution agreements, narrative and financial reports, work plans, and evaluations. The project files reviewed for the six local network host organizations included contracts, narrative and financial reports, and action plans. The sample of funded projects from each of the three national centres was based on project proposals, funding agreements, mid-term and final project summaries, and where available, project evaluations.

Telephone Interviews with Funding Recipients (n=16) were conducted with members of voluntary sector organizations across Canada between February 4 and 28, 2005. The projects of the participating organizations included five funded by KDC, six funded by CSC, and five funded

through ICBA (see Annex D). The TOR dictated the number of interviews with each type. The evaluators selected the specific projects to be contacted. Projects were selected with a view to achieving a mix of provinces, funding years, funding amounts, and themes.

Seven interviewees came from KDC-supported research projects in British Columbia, Manitoba, Nova Scotia and Ontario. (Universities, regional and national non-profit organizations were represented). The six CSC funding recipient respondents had community-based projects in New Brunswick, Manitoba, Ontario, Prince Edward Island, Quebec and the Northwest Territories. The five ICBA funding recipient respondents were from local organizations in British Columbia, Newfoundland, Nova Scotia, Ontario and Quebec. With one exception, the projects were small in scale (i.e. between \$500 and \$7,000).

File Review (n=10) and Interviews with Unfunded Applicants (n=4)

- Four from CSC (two from New Brunswick and PEI; 2003/04; two from Manitoba and Alberta, 2004-05);
- Four from KDC (one from Ontario, 2002-03; one from British Columbia, 2003-04; and two from Newfoundland and Nova Scotia, 2004-05); and
- Two from ICBA (one from Newfoundland and Labrador, 2003-04; and one from Ontario, 2004-05).
- Four interviews with unfunded applicants.

Projects were selected with the aim of getting a mix of centres, years, provinces and themes. The documents reviewed included applications, letters of decline, and evaluation summaries.

Administrative Systems and Database Review. The review of administrative systems and databases involved a document review, interviews and a follow-up information request. The document review consisted of activity and financial reports, reporting templates and evaluation templates. Six interviews were conducted with CPP and Centre officials responsible for collecting performance indicators and undertaking ongoing performance measurement.

The follow-up information request asked all interview respondents to identify the Accountability, Risk and Audit Framework (ARAF or 'Accountability Framework') indicators they collect as well as how they are collected. The responses were used to assess the adequacy of data monitoring and reporting of the Accountability Framework indicators.

1.3.3 Challenges Encountered

The major challenges encountered, and subsequent mitigating measures, were:

- ***Delays in finalizing instruments/methodology report.*** The project started up just before the December 2004 holiday season. This delayed the completion of the first methodology report and draft instruments. The drafts underwent a number of revisions in order to satisfy the priorities of the evaluation. To compensate for these delays, notification letters were sent as soon as the guides were finalized, but before they were translated. As well, key informant

lists were finalized over time as new information was made available thus ensuring that key lines of evidence could be started as soon as possible.

- ***Delays in receiving files for funded projects and unfunded applicants.*** Because CVI centre/host organization files are not centralized, it took several weeks to get the majority of project files requested. To compensate for these delays, regular contact was maintained with CPP and national centre representatives to arrange receipt of the files in a timely manner and the file reviews were begun as files were received.
- ***Availability of interviewees.*** Because the evaluation was largely undertaken during the busy end-of-government-fiscal-year period (i.e., February and March), it was often a challenge to locate and secure interviewees, governmental and non-governmental alike. To compensate for this, an effort was made to be flexible in scheduling interviews, and a great deal of time was spent pursuing certain interviewees (funding recipient interviewees in particular). As well, reporting began prior to the completion of the interviews.
- ***Difficulty in accessing final financial data.*** Due to the decentralized nature of the CVI delivery model, timely access to final and approved financial data for each of the centres, centre components and CPP proved to be a challenge. Extensive time and effort were spent assembling the data and preparing explanatory notes to ensure that the financial picture for CVI was clear, transparent and consistent.

1.3.4 Limitations of the Methodology

Key methodological limits include:

- ***Lack of knowledge/focus of interviewees of the awareness and information components of ICBA.*** While efforts were made during interviews to probe for feedback related to these components, most findings in the report stem from files.
- ***Lack of availability of rolled-up output and outcome data.*** Due to the recent development of output and outcome indicators in the Accountability Framework (finalized early in FY 2004-05) and the lack of a database to collect indicators, no performance data rolled-up across projects or centres was available. Thus, findings related to achievement of outputs and outcomes are limited to those found in the file reviews or anecdotal evidence from interviews.
- ***Criteria established for the file review of local network host organizations*** did not include those local networks to be visited for an interview in order to minimize the burden on those local networks. However, this resulted in the file review being focused on networks that are considered by CPP to be less mature than the five selected for the site visits (chosen in part, for their level of maturity).
- ***Challenges in drawing conclusions regarding the use of resources.*** Due to the fact that the evaluation covers the early stages of CVI implementation (e.g., including newly established delivery mechanisms and funding processes), there are several challenges in interpreting the use of resources. For example, in some cases, centres were not able to spend their entire

budget. Also, the comparability of the types of expenses by centre is questionable since each centre uses its funds for unique purposes and may in fact code expenditure items differently.

2.0 Findings

Findings are presented below as follows:

1. Design
2. Delivery and implementation
3. Evidence of progress towards outcomes achievement
4. Performance measurement strategy and practice

2.1 Design

As mentioned, the CVI was designed by a joint voluntary sector/government working group, using a report issued by the National Volunteerism Initiative Joint Table of the VSI.

2.1.1 Design Appropriateness

There is agreement among all individuals interviewed for the evaluation that the overall rationale of the CVI is clear and appropriate. As well, it was generally agreed that the CVI design is appropriate to meet the needs of volunteer organizations in terms of increasing volunteerism. The design has several key strengths identified by key informants, including:

- Decentralized, grassroots approach involving local organizations while allowing flexibility for each local network to choose and implement its own delivery structure;
- Good accountability mechanisms;
- Builds on existing strengths in the voluntary sector and takes full advantage of existing networks, structures, and expertise; and,
- Driven by voluntary sector organizations most familiar with what would be the most effective delivery approach.

While the existing design is believed to be appropriate to meet the needs of volunteer organizations, a couple of suggestions made by key informants for possible alterations to the design include:

- Build in a mechanism (e.g., divert existing resources, expand the role of local networks) to help organizations identify, access and use the knowledge and tools produced by research and pilot/demonstration projects (mentioned by many respondents representing all types); and,
- Increased independence of local networks to build capacity in their jurisdictions in ways that the networks deem most appropriate – this would include more research and capacity-building dollars at the discretion of the networks (mentioned by several respondents, particularly local networks).

Appropriateness of Funding Breakdown

All respondent types were asked to comment on the extent to which they felt that current funding breakdown (e.g., between centres, on identified priorities) was appropriate (respondents were not asked to comment on the adequacy of funding to CVI overall). The evaluation found that the current funding breakdown to the different program areas is deemed adequate by most key informant respondents, although several respondents (particularly local network coordinators and

PCH and national centre representatives) suggested that there may be opportunities to reallocate funding given the emerging needs of the voluntary sector. In particular, these respondents highlighted the following opportunities for future reallocation:

- Allocate some of the funding currently going to national awareness activities to local networks to allow for tailored awareness activities (mentioned by a couple of local network coordinators and one PCH respondent);
- More funding to local networks to work toward sustainability of the network through more consultations and Network meetings (mentioned by a couple of local network coordinators);
- More funding available to local network organizations and coordinators for administration (required due to variable levels of capacity within host organizations as well as higher than anticipated costs, such as travel and outreach) (mentioned by a few local network coordinators);
- Split the current KDC funding into a national pot (that would fund projects according to the current guidelines) and a community-level pot (that would work to maximize knowledge transfer and knowledge management) (mentioned by a national centre representative, and several local network coordinators and members); and
- More funding allocated to assist organizations to use the findings from the pilot and demonstration projects in their operations to enhance core organizational capacity (mentioned by a national centre representative, and several local network coordinators and members).

2.1.2 Program Theory

The concept of program theory relates to the extent to which CVI activities are considered to plausibly lead to outputs and the extent to which outputs are considered to plausibly lead to outcomes. As well, this section considers the extent to which the activities carried out and funded by the three national centres are consistent with the CVI outcomes. All key informant respondents indicated that the current activities depicted on the logic model and carried out by national centres are the most appropriate to achieve the desired outcomes. These respondent types could not recommend additional activities, nor could they identify any significant gaps.

Similarly, all funding recipient interviewees of all types (i.e., KDC, CSC and ICBA) felt that their projects were closely linked to the CVI objectives. Funding recipients from all centres gave examples of how their projects would directly contribute to CVI outcomes:

- KDC respondents said they expect their research projects would lead to an expanded body of knowledge by contributing reports and research to the existing body of knowledge.
- CSC funding recipient respondents reported a wide range of activities, including delivery of workshops and training sessions for volunteers and organizations, design and dissemination of resource materials, and organization of events to promote volunteerism, mobilize and recruit volunteers.
- ICBA funding recipient respondents indicated that CVI activities funded through their projects were likely to lead to the desired outcomes in terms of capacity building of the voluntary organizations and increased awareness of volunteerism and participation in volunteer activities.

The work plans reviewed for all national centres also demonstrated how the activities funded by each centre are expected to contribute to several intermediate/ultimate outcomes of CVI.

- KDC work plans indicate that KDC projects will:
 - ▶ Encourage Canadians to participate in voluntary organizations (via research reports that help organizations understand volunteerism, volunteer programs and the use of technology in volunteer management programs); and,
 - ▶ Improve the capacity of organizations to benefit from the contribution of volunteers (via research reports that explore leadership volunteers, and the impact of changes in government services).
- CSC work plans reviewed for the evaluation also point to strong linkages with a number of CVI outcomes. It is expected that CSC projects will:
 - ▶ Encourage Canadians to participate in voluntary organizations (via development of tools designed to make volunteer programs more attractive to potential volunteers);
 - ▶ Improve the capacity of organizations to benefit from the contribution of volunteers (via projects that develop strategies to improved volunteer development); and,
 - ▶ Enhance the experience of volunteering (via projects that explore and explain the most effective organizational management approaches for volunteer management).
- ICBA work plans indicate that the activities funded through the Information Clearinghouse, outreach and awareness component (i.e., campaigns), and local networks are expected to:
 - ▶ Encourage Canadians to participate in voluntary organizations (via making information on volunteering available through the Clearinghouse, and raising awareness of volunteering, the value of volunteers and volunteerism more generally via the campaigns, media releases, and public service announcements);
 - ▶ Improve the capacity of organizations to benefit from the contribution of volunteers (via providing access to tools, information and resources for voluntary organizations through the Clearinghouse, the resources and promotional items developed as part of National Volunteer Week designed to assist organizations develop volunteer recruitment strategies and volunteer management programs, and, the establishment and support of local networks of voluntary organizations to develop capacity through increased dialogue and information sharing); and,
 - ▶ Enrich the experiences of volunteers (via providing access to tools, information and resources for voluntary organizations through the Clearinghouse, the resources and promotional items developed as part of National Volunteer Week designed to assist organizations develop volunteer recognition programs, and, the establishment and support of local networks of voluntary organizations to develop effective volunteer management programs/systems through increased dialogue and information sharing).

2.2 Delivery and Implementation

2.2.1 Governance, Roles and Responsibilities

Governance

Overall, governance mechanisms for the CVI are seen as appropriate (i.e., respondents did not identify a requirement for new structures to be introduced), although respondents raised several areas for improvement. For example, several key informant respondents (including Local Network, National Advisory Committee and SMC representatives) feel that the various

administrative, decision-making and advisory bodies are not interacting and exchanging information as much as they could.

As well, with the progression of the CVI, the desired role of the Strategic Management and Coordination Committee (SMC) is believed by respondents with knowledge of the SMC (i.e., most of the PCH, national centre, and SMC representatives) to be evolving from an operational role to a more strategic one. However, in terms of the ability of the SMC to take up this new role, respondents generally agreed it has not succeeded. Thus, the SMC was commonly described as underutilized and not as effective as it could be. While no respondent recommended dissolving the Committee, most feel that its role and impact on the CVI could be improved. In particular, respondents suggested the following approaches to improving the SMC:

- Take on a more strategic role supported by documentation supplied by the Community Partnerships Program Directorate of PCH (e.g., one respondent suggested that the SMC could take on the responsibility of developing an annual statement of volunteerism based on survey findings and trends in volunteerism) (suggested by several national centre, PCH and SMC representatives);
- Consider the long-term issues facing the CVI (suggested by a few PCH and national centre representatives);
- Maintain the local network presence on the Committee and even have a sub-committee of local network representatives that would take on some of the national operational issues (suggested by one PCH respondent, a couple SMC respondents, and one local network coordinator); and,
- Clarify the Committee's role regarding accountability – a couple of respondents do not feel that SMC should take on the role of management oversight, but rather should be more strategically focused (suggested by one PCH and one national centre representative).

Roles and Responsibilities

Most key informants indicated that roles and responsibilities are generally well understood, although, due to the complex nature of CVI delivery, there has historically been some confusion. For example, there has reportedly been some confusion regarding the role of the local networks in terms of the extent of independence from Volunteer Canada and their mandate to set their own direction (e.g., the management and allocation of the capacity-building dollars was transferred from Volunteer Canada to local networks in 2004-05). Key informants indicated that these roles have now been clarified.

Almost all the KDC funding recipient respondents reported they were familiar with the different players of CVI and their respective roles, including the role of KDC and PCH, although only two KDC respondents were familiar with local networks (due to their direct involvement). Roles were less clear among CSC and ICBA funding recipients. CSC respondents (three of the five interviewed) in particular indicated that the roles of CSC, KDC, and local networks were confusing.

Government/Voluntary Sector Relationship

With regard to the extent of partnership between government and voluntary sector, while most government representatives think that the CVI represents a unique partnership approach to government programming and recognition of the contribution of the voluntary sector, most other key informants questioned whether a true partnership could ever be possible between a funder and funding recipient. Given the contribution agreement mechanism, these non-governmental respondents recognized that the government must require some form of accountability reporting. However, the contribution agreement process was recognized by a couple of key informants (including one PCH representative and one national centre representative) as being prohibitive to the joint development of objectives and enabling partners to bring expertise to the table in an equal fashion (i.e., as an equal partner). Respondents did not communicate the impact on outcomes achievement (if any).

Most non-governmental respondents were quick to point out that the relationship with the government for CVI is unique and very collaborative and that a “worthy attempt” has been made towards partnership. It was said that PCH “tries hard to behave as partners”, but a couple of respondents feel the Department’s program officers/managers would benefit from more experience delivering programs from the perspective of a voluntary sector organization.

The issue of partnership was also raised in terms of the relationship between Volunteer Canada and host organizations/coordinators. Most coordinators interviewed indicated that they felt the relationship with Volunteer Canada was paternalistic and not a partnership (e.g., project approvals and capacity-building contracts held by Volunteer Canada in the first year). Many of these respondents felt that this relationship has been significantly improving with time (e.g., many changes made over time demonstrated flexibility and willingness to work with local networks).

2.2.2 Management

Management Approach Generally

Generally, program management is considered effective. Third-party delivery organizations are believed by most key informant respondents to have the capacity to deliver a program of this size, nature and scope. A few respondents (from national centres, primarily) expressed concern regarding the high turnover of the CPP management during the three-year timeframe of the CVI. There was a feeling that this turnover has led to a lack of continuity and changing expectations and priorities. Several respondents (including one funding recipient, and a few local network coordinators/members) expressed some desire for further decentralization of CVI administration and management (i.e., more locally focused). It was indicated that needs within each province and territory are different and that PCH could take leadership giving the general directives of the Initiative, but implementation would be more successful if managed within provinces/territories. It was further stated that, accordingly, the necessary flexibilities would be accommodated to meet the regional needs.

Communications

Overall, communications are believed to be generally effective and/or improving (e.g., communications to unfunded applicants is considered to be improving, more one-on-one communications are occurring with short listed KDC applicants to assist them with preparation of proposals), in both official languages. The evaluation found that all respondents of all types indicated they were familiar with the desired ultimate outcomes of the CVI and most were familiar with the intermediate and immediate outcomes. Some specific opportunities to improve communications further mentioned by respondents include:

- Improved service delivery in both official languages, especially to minority language speakers (mentioned by a few local network coordinators and two funding recipient respondents). Respondents voicing this concern indicated that there have been improvements and that additional funding for official languages would also help to address this issue further.
- A couple of local network coordinators voiced an interest in receiving more feedback from national centres on the materials and reports forwarded by local networks.
- Local network coordinators and members from a couple of provinces felt that improved communications between local networks could offer an opportunity to share best practices and promote more collaborative actions (note that the evaluation found some local networks already collaborate; also, teleconferences, face-to-face meetings and an extranet are currently in place).
- Respondents from local networks in the north continue to request more plain language communications from Volunteer Canada and KDC (although respondents conceded that this concern has been addressed to some degree by national centres).

2.2.3 Implementation

Consistency of Implementation with Planned Design

According to respondents who were involved from the beginning of the Initiative in their respective roles (including all the PCH and national centre representatives, all local network coordinators interviewed, and most advisory committee members), the CVI was implemented as planned (from the context of their involvement). The only modifications brought to the initial design consisted of improving the structures and mechanisms put in place and responding to requests for flexibility from local networks. For instance, resources for official languages services were adjusted to assist some provinces in meeting this requirement. Also, administration of local capacity-building grants was devolved from Volunteer Canada to local networks when it became apparent that they were better positioned to administer them (e.g., for the 2004-05 FY). Overall, these adjustments were seen to respect the intent of the CVI design.

Several key informants identified two perceived exceptions to this trend. The first pertains to the Official Languages Strategy. It was initially understood that the strategy would be a pilot project and that local networks would have an opportunity to provide feedback before the strategy would be finalized. However, the current strategy presented by PCH was perceived as a “top down”

approach.¹¹ The second perceived exception pertains to the increased need to report on projects and involvement of ethnocultural communities after the Initiative was begun.

Selection Process for/Timeliness of Projects

The *selection process* for grant funding through KDC and CSC is deemed by all key informant respondents as an appropriate and effective means of allowing local input into decision-making. There is a general consensus among all respondent types that the funding processes and criteria are resulting in funding the types of projects expected to lead to the achievement of outcomes. Application forms and guidelines were simplified to accommodate smaller organizations and a letter proposal option was introduced as a first screening stage to minimize the burden on KDC applicants. Selection criteria and proposal rating templates (and scales) are deemed appropriate by most respondents, as is the advisory committee approach (i.e., KDC and CSC advisory committees are composed of local network representatives) to project selection.

The majority of funding recipient respondents from KDC, CSC and ICBA also indicated that the application guidelines, selection criteria and overall process were smooth, clear and well communicated. For those that required it, guidance was reportedly useful and timely. A couple of ICBA funding recipient respondents indicated that the application deadlines could be examined to accommodate small organizations with limited human resources capacity and to allow consultations and partnerships in the community. Unfunded applicant interviewees felt that the time between the RFP and the submission deadline could be extended, particularly in cases where projects are shared between organizations.

All the files for the unfunded applicants reviewed included a letter of decline received by applicants in response to their application; however, not all of the letters outlined a reason for the refusal. Interviews with unfunded applicants, however, found they were satisfied with the communications provided, although two interviewees indicated that they were responsible for following up with the centre for detailed reasons for their decline, as the letter did not provide this information.

As for *the timeliness of funding approval*, ICBA funding recipients indicated funding was received on time. In the case of KDC funding recipients, the few reported challenges encountered as a result of delays in the approval process and receipt of funding (voiced by three respondents out of five) were largely resolved through reportedly good communications with KDC, flexibility on the part of the funded organizations (i.e., to reallocate funds to the delayed project from other sources, to reallocate the time of key staff towards the end of the timelines), and in one case, a time extension granted by KDC. However, respondents indicated that delays in research projects were inappropriate, adding barriers to the unexpected difficulties commonly experienced in research. They also voiced the concern that a time extension was not automatically granted, and that additional time and effort had to be spent requesting extensions.¹²

¹¹ Note that contribution agreements signed with all three national centres included requirements pertaining to Official Languages. CPP representatives noted that further action was required on their part after the Commissioner of Official Languages received complaints regarding CVI.

¹² The KDC recognized the timing problems associated with its funding competitions and began a process to work towards a full year for researchers to undertake their projects. KDC also reprofiled funds towards that end.

Four of six CSC funding recipient respondents also experienced time delays. In these cases, the delays affected the success of the projects (e.g., relating to the quality of reporting, project sustainability) since these organizations did not have funds to start the projects before funds were received from CSC.

One message that was heard from many funding recipient and unfunded applicant respondents was that a one-year funding cycle is generally too short to undertake research-based projects as well as those that require a regional or national scope.

Adequacy of Funds for Reporting

In terms of the adequacy of funding available for reporting and administration, it was considered generally appropriate by most key informants (i.e., local network coordinators, national centres) for local network and national centre reporting. However, practically all respondents of all types expressed concern that some project funding recipients with less organizational capacity for reporting require more time and resources to carry out the necessary levels of reporting. In fact, according to all funding recipient respondents, the funding for data collection, monitoring and reporting of performance are not appropriate. A few respondents suggested that a certain percentage of the funding (i.e., 15% or 25%) should go towards administration, monitoring and reporting. Most did not indicate any amount, but stated that the resources of non-profit organizations could not meet the reporting requirements while fully implementing the projects.

While the reporting load on local network coordinators varies by the capacity of the host organization to take on some of these responsibilities, most local network coordinators interviewed gave examples of having to spend time reporting rather than carrying out their primary responsibilities. One respondent, for example, had to hire consultants to conduct follow-up activities with grant recipients because the time of the coordinator was consumed with reporting.

Also, while some additional funding was made available when the Official Languages Strategy was implemented (\$270K), none of this money was made available to Volunteer Canada, even though there were increased responsibilities regarding monitoring and supporting of official language implementation.

2.2.4 Alternative Approaches

Respondents of all types view the CVI as a unique and innovative approach to bringing together local and national perspectives. All respondents felt that the activities funded under CVI can be expected to lead to the outcomes and most respondents of all types could not suggest alternatives to the current design that would meet the desired outcomes of the CVI in a more cost-effective manner. Amongst the few suggestions made were:

- Consider involving PCH regional offices in the delivery of the CVI. Representatives could sit on network advisory committees, assist with developing organizational capacity for reporting/monitoring and offer project support (suggested by one PCH representative);
- A model whereby KDC would work with a smaller set of organizations in the development of research products for a long period of time could achieve better outcomes, although it has the

disadvantage that many individual organizations, particularly smaller ones, would be left out (suggested by one KDC funding recipient);

- Fund pilot/demonstration projects with a focus on sustainability to assist organizations in continuing and building on project achievements, and ultimately enhance long-term outcomes of CVI (suggested by two CSC funding recipients).

2.3 Evidence of Progress Towards Outcomes Achievement

Evaluation findings confirmed that the Initiative is considered by respondents of all types to be highly relevant for voluntary sector organizations and volunteerism more generally. A local network respondent indicated that the CVI enables groups to get together and essentially form an umbrella group of organizations to look at issues of volunteerism.

2.3.1 Activities and Outputs

The CVI logic model depicts five main activities of the CVI: 1) Develop and conduct promotional activities (via ICBA); 2) Support research and pilot/demonstration projects (via CSC and KDC); 3) Collect/develop/disseminate resources and transfer knowledge (via ICBA, CSC, and KDC); 4) Create and support networks (via ICBA); and, 5) Manage, monitor and report (all national centres and CPP).

The evaluation found that all five of these activities have been carried out over the first three years of the Initiative. Achievements are described by activity, below. This evidence was gathered through the document review, file review, and anecdotal evidence collected through interviews.

Develop and conduct promotional activities (via ICBA)

Three promotional campaigns have been run for each of the three years of the CVI under review. As well, public service announcements and other communications related to each of the campaigns are issued and reviewed by ICBA. For example, for the 2004 National Volunteer Week (NVW) campaign, the project's contractor for social marketing disseminated "Thank You" television spots to 145 television stations across Canada, and 25 media outlets were contacted to run the news release. For Global Youth Services Day (GYSD), 2004, over 475 new schools were identified and contacted and over 1,500 schools received fax-broadcasts. Public service announcements (PSAs), articles and other contacts were made as part of the International Volunteer Day Campaign, December 5, 2004. In particular, contact was made with over 100 daily and over 800 weekly newspapers, 450 radio stations, magazines, over 100 student unions, over 100 senators, over 300 members of Parliament and over 100 embassies to run either PSAs, include articles in newspapers or newsletters, place a banner on their Web site, or mention the campaign in speaking engagements.

Promotional activities undertaken by KDC during the evaluation period include the development of a logo for the KDC, radio interviews, newspaper articles, development and distribution of a bilingual promotional card to encourage research on volunteerism and promote the Web site, and contacting target audiences via broadcasted "e-lets" to inform them about the release of various KDC information resources and funding opportunities.

Promotional activities regularly undertaken by CSC include presentations at conferences, promotion of funded projects through "eVolution" e-magazine, and other ad hoc media exposure.

Support research and pilot/demonstration projects (via CSC and KDC)

A number of research and pilot/demonstration projects have been undertaken since the inception of the CVI. All but one round of funding for projects through KDC and CSC were competitive and based on themes developed in consultation with local networks and other stakeholders.

At KDC, to date, 26 community-based research projects and 21 national research projects have received funding over three years (2002-03, 2003-04 and 2004-05) since the Centre was established in November 2002. By year, projects breakdown as follows:

- 2002-03: December 2002: 7 national projects;
- 2003-04: June 2003 competition: 4 national and 8 community-based projects;
- 2003-04: December 2003 competition: 4 national and 7 community-based projects; and,
- 2004-05: August 2004 competition: 6 national and 11 community-based projects.

The KDC themes¹³ for the 2004-05 funding competition are: governance and leadership; volunteer recruitment, management, and development; the value of volunteering; and, volunteer experiences. The KDC themes for the 2003-04 funding competition launched in December 2003 were: volunteer motivation, recruitment, retention, recognition, and support; and, volunteer placement and training. The KDC themes for the 2002-03 funding competition launched in June 2003 were: governance and leadership; government downloading; liability; and, social, economic, demographic, and geographical trends.

The projects funded in December 2002 did not engage in a competition for funding. Rather, funding was extended for projects that had been funded as part of a competition undertaken for the International Year of Volunteers Research Program. This approach was taken to ensure that information resources would be available for knowledge transfer by the end of the second year of operation while allowing time for KDC to hire staff, establish the program, develop the Web site and other tools, consult with local networks and prepare the launch the first funding competition.

For CSC, two grant competitions have been held to date resulting in 19 projects funded in 2003-04 and 15 funded in 2004-05. The CSC themes¹⁴ were: for 2002-03, there was no theme since there were no funded projects, although some work was done on determining the “state of the nation” in volunteer management; for 2003-04, projects were to be based on the “Canadian Code for Volunteer Involvement” and/or “Job Design”, with an emphasis on the involvement of youth and people of diverse cultures; and, for 2004-05, the theme was “Broadening the Base of volunteers.”

To support the organizations undertaking the research and pilot/demonstration projects, a number of guidelines and guides were provided to assist with the application and reporting processes. Also, representatives from the national centres (i.e., KDC and CSC) provide ongoing advice and mentoring to funding recipients, as required (e.g., via teleconferences).

¹³ KDC themes as identified on the KDC Web site.

¹⁴ As identified by CVI Manager at CPP.

Collect/develop/disseminate resources and transfer knowledge (via ICBA, CSC, KDC)

Each of the centres has some responsibility for the transfer of knowledge and dissemination of resources. The formative evaluation found that the Volunteer Resource Centre (also referred to as the Volunteerism Information Clearinghouse) has been implemented and is operational and currently houses hundreds of documents and online resources/links. The Centre undertakes contracts with researchers to search out and populate the Web site with more resources, as well to undertake other reviews, such as accessibility studies. Volunteer Canada also maintains an extranet to allow knowledge workers to access, manage, share, and interact with information, documents and applications, as well as to interact with other people.

According to the May 2005 KDC Evaluation Report, a number of knowledge transfer activities have been undertaken by the Centre between December 2003 and January 2005. In particular, a knowledge transfer strategy (based on a needs assessment, consultations and input from the KDC Advisory Committee) was developed. The KDC also has a Web site in place (June 2003) and many bilingual information resources available for download on the Web site. Between December 2003 and January 2005, KDC prepared 20 information resources (e.g., fact sheets, manuals and reports) for publication and distribution on the Web site, in print and at various events.

The CSC reported several knowledge dissemination activities in their Quarterly Narrative Report for the period October to December 2004. In particular, they worked closely with Imagine Canada in the review, edit, and layout of various information products and projects funded in 2003-04. As well, site visits with 2004-05 funded organizations were conducted, in part to assist them with their knowledge dissemination strategies. The CSC also completed a redesign of the CVI Web site to improve access to information resources and completed/posted a number of other resources to the Web site. Other knowledge dissemination activities regularly undertaken by CSC include presentations at conferences and workshops for funding recipients (e.g., plain language).

Create and support networks (via ICBA)

Thirteen (13) local networks and one national network (NNVIO) have been established and two annual forums have occurred. As well, various partnerships have been established in local networks, and national centres have provided advice/mentoring.

A number of capacity-building efforts have also been undertaken. In some provinces/territories capacity-building activities have included consultations within the voluntary sector, consultations with groups/organizations outside the voluntary sector (e.g., with industry and government), town hall type meetings with communities, the development and circulation of newsletters, and direct assistance to voluntary sector organizations to seek out and apply for funding.

Capacity-building activities in some provinces/territories also include the funding of community-based projects (for example, those selected through a Granting Program RFP process that would have included RFP development, selection process and support to funded groups). Not all provinces and territories have adopted this approach. Capacity-building projects could include funding for non-profit organizations to engage in recruitment and retention of volunteers and

included activities such as workshops and training sessions for staff and volunteers, resource materials, and Web site development.

Manage, monitor and report (all national centres and CPP)

In terms of outputs produced for this activity, national centres prepare many different types of plans (e.g., work plans, communication plans and centre/project evaluation plans) for their internal use and to feed up to CPP. For their part, CPP prepares plans for the Directorate as a whole that also directly take into account CVI activities (e.g., business plans, strategic plans, work plans). Also, national centres report providing regular, ongoing advice and guidance to project funding recipients, local network hosts and coordinators. As well, advice is regularly shared between national centres and between CPP and national centres. Site visits have occurred as deemed appropriate by national centres (e.g., site visits were carried out for CSC funding recipients). National centres receive regular activity and financial reports from funding recipients and centres also prepare periodic monitoring and evaluation reports, according to their plans. Centres then submit roll-up reports to CPP (e.g., roll-up activity reports, financial reports and reports on the Accountability Framework indicators). CPP prepares a number of reports for departmental reporting, including input to the Departmental Performance Report, Report on Plans and Priorities, and input to other ongoing/ad hoc requests for information pertaining to CVI. In terms of governance mechanisms, the SMC is in place and functioning, as well as an advisory committee for each of CSC and KDC.

In the context of this activity, the formative evaluation also probed for the estimated proportion of time spent on the collection of performance data, project/contribution monitoring, and reporting¹⁵. CPP staff estimate that they spend approximately 184 person days collecting data, monitoring, and reporting for CVI. At the three national centres, the level of effort allocated to reporting and performance measurement varied. KDC staff reported that collecting data, monitoring, and reporting for all projects and proposals require the full effort of a full-time program officer. Monitoring of ongoing projects alone occupies approximately 35% of the KDC Program Officer's time. The Program Officer also has a role in the design and implementation of the program, including the application and evaluation tools and resources; in liaising with the Advisory Committee; and in the development of the knowledge transfer component of the program.

Within CSC, the manager's full-time role comprises collection of project data, maintaining the file system, ongoing monitoring, and reporting. A representative from the Information component of ICBA reported that approximately one week per month is allocated to data collection and analysis for the Web site and Volunteer Resource Centre (information). The IT coordinator also maintains the extranet site, although this figure was not quantified. For the Capacity-Building (local networks) component, two full-time employees are allocated to maintaining the systems, collecting data, monitoring, and reporting. As part of the Awareness component, it was reported that Volunteer Canada has eight part-time employees responsible for collecting and updating information, monitoring stakeholders' needs and fulfilling requests for promotional materials.

¹⁵ The information pertaining to reporting and performance measurement were estimates provided by the respective program staff and managers for CPP, KDC, CSC, and ICBA.

2.3.2 Immediate Outcomes

The expected immediate outcomes of the CVI include:¹⁶

- Increased recognition of volunteers;
- Increased capacity to mobilize/recruit volunteers;
- Expanded body of knowledge;
- Increased development of innovative ideas and programs;
- Increased relevant information;
- Improved access to relevant information; and
- Increased information sharing/dialogue.

On the whole, respondents felt that significant progress had been made towards the immediate outcomes. Progress towards each outcome is highlighted below, as evidenced from key informant interviews, interviews with funding recipients, the document review and file reviews.¹⁷

One area raised by a few respondents (including one PCH, one national centre and one local coordinator representative) was that the contribution of the funding provided to Social Development Canada (SDC) to outcomes was not apparent. No files were available for the evaluation that could provide insight into how the SDC component of CVI contributes to the outcomes of the Initiative, since this evaluation focused on the PCH component.

Progress towards achievement of:

Increased recognition of volunteers

The file review found that projects funded by all three centres (KDC, CSC and ICBA) have contributed to an increased recognition of volunteers, either through the funding of recognition events; training sessions, including the value of volunteers; or research projects on the value of volunteers. Of the 21 projects reviewed, six demonstrated some level of increased recognition of volunteers. Also, three host organizations indicated their activities had contributed to the increased recognition of volunteers.

Increased capacity to mobilize/recruit volunteers

The file review found that almost all of the ICBA capacity-building projects reviewed (n=9) and seven of the CSC projects reviewed had contributed to an increased capacity to mobilize/recruit volunteers. For the ICBA capacity-building projects, this mostly took the form of volunteer

¹⁶ These outcomes do not include the immediate outcomes of the Manage, Monitor and Report activity, as findings related to these outcomes will be largely answered by this evaluation.

¹⁷ Note that files for projects funded in 2004-05 and all but one KDC project file contain limited information pertaining to the actual achievement of outcomes (note that KDC recipients are not required to report on outcomes because KDC undertakes a separate periodic evaluation with this focus). Thus, findings in this section are based on the 10 completed ICBA projects, 1 KDC file containing a progress report, and 10 CSC files, four of which were completed and six for which interim reports were reviewed. Files were also reviewed for 6 host organizations, which contained inconsistent data on progress towards outcomes to date. Outcome data in this section are also based on the KDC evaluation report finalized in May 2005.

recruitment sessions, training sessions for organizations and the development and dissemination of tools and resources for volunteer recruitment. For CSC projects, outputs that contributed to this outcome included instructional documents and handbooks, as well as training sessions. One host organization report also indicated they had contributed to this outcome.

Key informant respondents also provided some anecdotal examples of increased capacity to mobilize/recruit volunteers. A few local network respondents, for example, said that the CVI has contributed to building the capacity of individual volunteer organizations, particularly those that were elected as hosts of their local networks and the two national organizations in charge of administering the CVI (although it is unclear whether these respondents were referring to capacity to mobilize/recruit volunteers, or rather capacity to manage programs and carryout reporting functions).

Expanded body of knowledge

Few of the files reviewed indicated a contribution to this outcome (i.e., only the one KDC file contained evidence of outcomes). This is likely due to the lack of evidence in KDC project files relating to outcomes. The May 2005 KDC Evaluation Report indicates that stakeholders (local networks, KDC Advisory Committee members, KDC funded researchers) surveyed indicated a very high level of agreement (with over 90% agreeing) with the statement “the KDC is building a body of knowledge on volunteering and volunteerism.” The CVI formative evaluation also found that all respondent types believed that funded KDC projects have contributed to an expanded body of knowledge. KDC funding recipient respondents indicated that an increased number of high-quality research reports were available on volunteerism and the non-profit and voluntary sector compared to previous years; and they attributed this improvement to the CVI.

Increased development of innovative ideas and programs

Four of the ten CSC projects reviewed provided evidence of increased development of innovative ideas and programs. Once all CSC projects are completed, it is likely this number would increase since most projects anticipated they would contribute to this outcome.

Many key informants (of all types) pointed to the funded CSC projects as directly contributing to an increased development of innovative ideas and programs. Many respondents (particularly local network coordinators and members) also mentioned the SMC Forum in Calgary as being an opportunity to learn about some of the innovative ideas and programs developed and implemented in the various local networks.

Increased relevant information

The funded KDC projects were believed by all respondent types to have contributed to increased relevant information. Again, however, due to the lack of evidence of outcomes of KDC projects reviewed, the file review did not find evidence that this outcome had occurred (although projects did appear to be on track to achieving this outcome based on the file review and interviews with funding recipients).

Improved access to relevant information

The file review found that all the ICBA capacity-building projects contributed to improved access to relevant information by providing forums, networking opportunities, workshops, Web site and other mechanisms with the expressed purpose of sharing information believed to be of particular relevance to the attendees. One host organization also reported to have contributed to this outcome via a workshop and dissemination of information to members.

The funded KDC and CSC projects were expected by all respondent types to contribute to improved access to relevant information. However, some respondents (of most types) felt that the dissemination of research reports (from KDC projects) and pilot/demonstrative project results (from CSC projects) could be improved. The main reason provided by respondents for not having these well disseminated was that there were unanticipated delays in finalizing the projects/ results. The KDC Evaluation Report (May 2005) reports “knowledge transfer is becoming a major focus of the Centre as its products are growing in numbers” and that the “knowledge transfer strategy is being reviewed and a broader dissemination and promotion strategy is being planned.”¹⁸

The implementation of the Official Languages Strategy was also considered by several key informants to have contributed to improved access to relevant information, as well as the establishment of the Web site for CSC, KDC and the local networks.

Increased information sharing/dialogue

Probably the most significant impacts to date have been realized for the outcome of increased information sharing/dialogue.

The file review found that six of the ICBA capacity-building projects, four of the CSC projects and the one KDC project reviewed for which there is a report, all contributed to increased information sharing/dialogue. Outputs leading to this outcome included workshops, training sessions and collaborative approaches to research. As well, all six host organizations directly provided evidence of increased information sharing/dialogue via the establishment of networks, consultations, and network meetings.

All respondents of all types also pointed to tangible examples of achievement of this outcome. For example, interviewees indicated that the CVI has had a positive impact on the development of volunteer organizations’ networks within and between provinces. Most local networks visited for the evaluation conducted province-wide consultations of their members and stakeholders, which led to a better identification of needs and priorities and to increased awareness of the CVI. Similarly, the governance and advisory structures created for the CVI have enabled local and national stakeholders to exchange lessons learned and best practices and to become generally increasingly aware of collaboration possibilities. A key example of this networking impact arose from the recent SMC Forum in Calgary, which was considered by all stakeholders to be a success and a marked evolution from the previous SMC Forum, which had adopted a lecture approach less conducive to exchanges among participants.

¹⁸ KDC, Knowledge Development Centre Evaluation Report, May 2005. Page 37.

Similarly, within local networks, the CVI is seen as having enabled linkages between various organizations and existing networks. The successes associated with increased networks and dialogue cannot be over valued, according to network members in one province. As well, new linkages between sectors of volunteer action were associated with CVI funding in another province, thereby leading to a widened definition of volunteerism. One example often mentioned was the inclusion of informal volunteers (such as hockey moms and dads), which constitutes a more inclusive definition of volunteerism than the one commonly held.

2.3.3 Intermediate and Ultimate Outcomes

The expected intermediate and ultimate outcomes of the CVI include:

- Increased awareness by Canadians of volunteerism;
- Improved understanding of volunteerism;
- Enriched experiences of volunteers;
- Increased capacity of voluntary sector organizations to benefit from the contributions of volunteers;
- Increased ability of voluntary organization to leverage other partnerships;
- Increased participation in volunteering in Canada (ultimate); and,
- Increased capacity of voluntary sector organizations to provide programs and services (ultimate).

The majority of respondents of all types felt it was too early to assess the intermediate and ultimate outcomes of the CVI, although there was a general consensus that the CVI was on track towards their achievement (e.g., a belief that there has been increased media coverage related to volunteerism since the CVI began). Below, progress to date on the intermediate and ultimate outcomes, where the evaluation found some evidence, is presented.

Progress towards achievement of:

Increased awareness by Canadians of volunteerism

One intermediate outcome where there appears to have been more progress than others is in the area of increased awareness by Canadians of volunteerism. The file review found that four ICBA capacity-building projects and three host organizations had contributed to some extent to increasing awareness of volunteerism among Canadians. For the ICBA capacity-building projects, this was accomplished via the promotional materials and workshops that were funded. For the host organizations, workshops, newsletters and other awareness-raising activities were held.

However, the evaluation did not find any evidence that the awareness campaigns are directly contributing to increased awareness by Canadians of volunteerism.¹⁹ Despite this, many key informants felt that the awareness campaigns and promotional materials and events funded under ICBA have in fact had an impact on increasing awareness of volunteerism among Canadians.

¹⁹ Files reviewed described activities undertaken, public service announcement airplay, media contacts, and lessons learned of an operational/developmental nature.

Improved understanding of volunteerism

Respondents of all types felt it was too early to expect progress towards this outcome. As well, no evidence of progress was found in the file review.

Enriched experiences of volunteers

Respondents of all types felt it was too early to expect progress towards this outcome. However, the file review found that three ICBA capacity-building projects had contributed to some extent to this outcome. For these projects, outputs related to volunteer management programs were believed to contribute directly to the enriched experiences of volunteers.

Increased capacity of voluntary sector organizations to benefit from the contributions of volunteers

Respondents of all types felt it was too early to expect progress towards this outcome. However, the file review found that six ICBA capacity-building projects had contributed to some extent to this outcome. For these projects, outputs related to volunteer management programs were believed to contribute directly to increased capacity of voluntary sector organizations to benefit from the contributions of volunteers.

Increased ability of voluntary organizations to leverage other partnerships

The immediate outcome of increased information sharing and dialogue is expected to lead to an increased ability to leverage other partnerships. Several key informants (including PCH, national centres and local networks and funding recipients) felt that this level of outcome is occurring between the government and the voluntary sector. The collaborative approach adopted by PCH representatives in their interaction with the CVI committees, structures, and local networks was repeatedly mentioned as a key success factor for the CVI. It has allowed for local bodies to make their voices heard and facilitated buy-in on the part of local stakeholders and provincial/territorial bodies. An example of this increased buy-in is the collaboration of the Quebec government in the CVI (although buy-in at other government levels was also mentioned by respondents in other provinces/territories). In Quebec, the Ministère de la solidarité sociale provides an equal amount of funding to the local network host organization as the CVI. As well, representatives of the Ministère attend network meetings on a regular basis.

It was also mentioned by a few local network coordinators and members that in some provinces there has been the onset of a wider dialogue among interest groups, spurred by the consultations initiated by the local networks. Also, it is clear to many key informants that the CVI is playing a central role in helping the voluntary sector in Canada in becoming organized as a national sector.

Increased participation in volunteering in Canada (ultimate)

Respondents of all types felt it was too early to expect progress towards this outcome.

Increased capacity of voluntary sector organizations to provide programs and services (ultimate)

Respondents of all types felt it was too early to expect progress towards this outcome. The file review found that many of the projects (including several from ICBA and the one from KDC) will likely contribute to this outcome in time.

2.3.4 Unintended Outcomes

Unintended outcomes (mentioned by one respondent each) include:

- Improved understanding by government of the challenges faced by the voluntary sector regarding their expressed need for core funding, liability issues and capacity;
- CVI funding for research projects has acted as a catalyst in some cases where projects have continued and/or been translated into long-term research.

2.4 Performance Measurement Strategy and Practice

2.4.1 Current Status

In consultation with Volunteer Canada, Imagine Canada, and a local network representative, CPP developed a revised logic model for CVI, accompanying indicators for outputs and outcomes, and a data collection strategy identifying responsibility for the collection of indicators. This consultative process (including a two-day workshop) was undertaken in early FY 2004-05 and finalized in the summer of 2004.

Community Partnerships Program (PCH)

CPP uses the Grants and Contributions Information Management System (GCIMS) and an electronic file system as administrative systems. The Grants and Contributions Information Management System (GCIMS) is used by all PCH grants and contribution programs. CPP uses GCIMS to document the opening of potential contribution agreements and to report expenditures associated with approved contribution agreements. The GCIMS system fulfills its role in terms of CPP grants and contribution reporting requirements, and CPP reports that they have adequate information to ensure that national centre organizations are meeting the requirements as laid out in their contribution agreements. GCIMS does not provide capabilities for CPP to use this system for internal monitoring purposes.

CPP monitors the performance of CVI through an electronic file system. The file system contains all annual work plans, annual progress reports, quarterly financial reports, quarterly narrative reports, advance request forms, and final closing reports from the three national centres (ICBA, KDC, and CSC). The information in the file system is used for performance monitoring and reporting. However, there is no capability within the system to easily rollup the results or to obtain quantitative information on outputs or outcomes achieved.

The Accountability Framework was developed early in fiscal year 2004-05 and therefore collection of output and outcome indicators based on the framework has only started in reports

submitted by national centres after July 2004. CPP expects that annual reports (submitted in May 2005) will provide more of a roll-up of performance data at the national centre level as well as for the CVI overall. The roll-up and analysis of performance data will be a collaborative effort between CPP and the national centre organizations. CPP itself does not directly collect performance data from KDC, CSC or ICBA funding recipients funded through national centres.

Indicators that are the sole responsibility of CPP will be provided primarily through program evaluation. Examples of data to be collected through evaluation include feedback from organizations and project participants on the achievement of outcomes. In addition, CPP reported that periodic public opinion surveys are conducted as well as analysis of data from surveys such as the Canada Survey of Giving, Volunteering and Participating (CSGVP). CPP expects that these surveys and the summative evaluation will provide data on longer-term indicators, such as levels of participation in volunteering.

A representative of CPP stated that once more complete data are available from all of these sources, the Community Partnerships Program will be in a better position to determine what type of database would be most useful for the collection of performance measurement data. CPP will be able to see what indicators are already being collected and identify where performance measurement improvements are required through understanding the data collection methods used by Volunteer Canada and Imagine Canada. It was indicated that a central database would be beneficial in contributing to departmental reporting and collecting data for evaluation and program renewal purposes.

Knowledge Development Centre (Imagine Canada)

The Knowledge Development Centre (KDC) currently monitors the performance of approximately 23 projects. Some of the ongoing projects were approved in 2003 and others were approved in 2004. Project funding recipients through KDC are expected to submit quarterly narrative and financial reports, as well as the final product (i.e., the research report). One national centre, several local network member respondents, and the funding recipient interviewees from universities felt this quarterly reporting requirement was overly onerous, given that the relative risk of non-performance is considered to be low. Funding recipients from universities felt that controls and reporting mechanisms are already built into the institutions' processes and that quarterly reporting is unnecessary and overly burdensome.

All of the KDC funding recipient respondents indicated that the guidelines, instructions and formats that were provided regarding indicators for target outcomes were simple and clearly articulated by KDC and well understood. All the respondents indicated they were provided with a format for a narrative report that seemed to have been consistently applied. Availability of KDC staff to answer questions or provide clarifications was reportedly very good.

Projects only report at the activity level, not on outcomes. KDC reported that they have not asked project participants to report on outcomes because they feel that outcomes would only be observed through measuring the use of the products that have been developed. Moreover, KDC undertakes their own periodic evaluations of completed projects that consider outcomes. Some participants reported attending a useful CVI training session on the monitoring and reporting of outcomes.

The data reported by each project is currently filed in separate electronic folders. Information is not rolled up into one report for all projects; however KDC plans to draft a roll-up report once all projects from the first funding period are complete. KDC reported that their method of monitoring is more cost-effective than site visits. KDC also stated that although the reporting is believed to be onerous for project researchers, it is necessary to ensure accountability. For example, quarterly reports must meet KDC's approval before KDC approves payment.

In accordance with the Official Languages Strategy, KDC collects statistical information on applications and proposals, by theme, by province and by language (French or English). KDC plans to develop a mechanism to conduct an analysis of applications and proposals by organization type, sub-sector, and topic area. They reported that this would require additional skilled human resources and time.

Information, Capacity-building and Awareness Centre (Volunteer Canada)

The Volunteer Canada Information, Capacity-Building and Awareness (ICBA) Centre has established databases and administrative systems under the following components; 1) Information; 2) Capacity Building; and 3) Awareness.

Information (Web site and Volunteer Resource Centre/Clearinghouse)

Volunteer Canada hosts a Web site and related data are collected on a Magma server. The IT coordinator and technology manager analyze data from the Web site on a monthly basis for monitoring and reporting purposes. Indicators that are measured include hits, downloads, views, and searches. The statistics are stored on Volunteer Canada's shared file system. ICBA and the Community Support Centre (CSC) use information from the Web site for ongoing monitoring as well as quarterly and annual reporting. The Web site hosts a Volunteer Resource Centre which uses the same data collection and analysis methods as the rest of the Web site. The technology manager estimated that one week per month is required for gathering and analyzing statistics from the Web site and the Volunteer Resource Centre.

Capacity Building (Local Network Activities)

Local networks are required to submit quarterly financial and activity reports to Volunteer Canada. According to documents and respondents and the views expressed by local network coordinators to Volunteer Canada by the original structure prescribed for reporting was deemed too onerous. In response to these concerns, it was decided in a meeting of network coordinators following the Calgary SMC Forum in February 2005 that the reporting requirements would be further revised to address stakeholders' concerns. This new approach to reporting is in progress²⁰.

Many local network respondents also voiced frustration with the frequent ad hoc requests for information (e.g., number of Aboriginal projects), passed along to them by Volunteer Canada

²⁰ Local network coordinators were asked to provide their input into a first draft by March 18, 2005. A meeting was to be held in early May to discuss the comments and the status of the revised templates.

usually in response to a departmental or ministerial request. While it is unclear how these requests could be reduced, it was nevertheless expressed by most local network coordinators interviewed as being a time-consuming distraction.

The following administrative systems and databases are in place for monitoring local network activities:

- Electronic files containing quarterly financial and quarterly activity reports from local networks. Participants follow a template for the financial reports and guidelines for activity reports;
- The local network extranet site includes two surveys for local network coordinators to complete: one survey collects indicators for ongoing performance measurement, and the other survey collects indicators for the Official Languages Strategy. As mentioned, these templates and guidelines are currently in a re-design phase.

Awareness

The marketing group at Volunteer Canada is responsible for the “Awareness” component of ICBA. The marketing group liaises with media organizations and encourages them to promote campaigns. The marketing group also liaises with voluntary sector organizations to track interactions with the organizations, participation levels at their events, and the quantity and type of promotional materials ordered. Output and outcome indicators currently collected are those identified in the Accountability Framework. Currently the indicator data is collected in an online database and it is used to make marketing campaigns more strategic. The data also enables ICBA to fulfill reporting requirements to CVI.

Community Support Centre (Volunteer Canada)

Project funding recipients through CSC are expected to submit quarterly narrative and financial reports, as well as the final product. In addition, all CSC funding recipients were visited this past fiscal year by a team led by Volunteer Canada. A national centre respondent indicated that the site visits were an effective monitoring mechanism as it provided a better feeling for the progress towards activities, as well as the overall capacity of the organization. All CSC funding recipient interviewees indicated that monitoring and reporting activities were appropriate, and that clear guidelines were provided. As well, those who mentioned the training on indicators and reporting said it was useful. However, a few voiced concerns about the amount of detail required and indicated that the reporting could be improved to make it less time consuming for organizations.

CSC maintains an electronic file system to store mid-term and final reports (financial and narrative) submitted by project participants. Evaluation templates are used to guide project participants through the reporting process. Participants report on objectives, activities, outputs and status. Outcome data (e.g., feedback from voluntary sector organizations regarding relevance/usefulness of information resources) are consistent with those identified in the Accountability Framework and are collected internally by the CSC manager and entered in an Excel sheet.

CSC reported that CVI has periodically changed the reporting requirements; therefore CSC has changed reporting requirements for project participants. CSC worked with Imagine Canada to

design effective performance measures. The data capture policies have been modified to ensure that they fulfill reporting requirements to CPP and are considered by CSC to be adequate. The quality of the data is expected to improve as project participants become more familiar with the performance measurement templates.

2.4.2 Overall Quality of Reporting

Based on documents reviewed, interviews and because the logic model and ongoing performance measurement strategy in the Accountability Framework were developed consultatively, this formative evaluation found that the logic model is a good depiction of the CVI logic, activities, outputs and outcomes. Evaluators consider that the outcomes depicted in the logic model are clear and measurable, although attribution to CVI will be a challenge in regard to longer-term outcomes. As well, as long as the requisite data are collected and stored electronically, the indicators should be adequate for measuring progress towards outputs and outcomes.

The evaluation found that all three national centres involved in delivering the CVI are collecting the performance measurement indicators for which responsibility was assigned in the CVI Accountability Framework as they pertain to outputs and outcomes. There was one minor exception to this finding for the output indicator of “evidence of advice mentoring” that is not currently being collected by Volunteer Canada for CSC or local networks.

For CSC projects and ICBA capacity-building projects, significant improvements have been made with respect to reporting requirements for project participants since the development of the CVI Accountability Framework in 2004. It is anticipated that ongoing improvements to the CSC and local network reporting templates will enhance the quality of the data being collected by focusing more on results of projects (recognized as a weakness in the Evaluation of Projects funded by CSC in 2003, September 2004). KDC reports on outcomes through periodic evaluation reporting. This report includes a review of activities as well as progress towards some of the Accountability Framework outcomes and indicators.

KDC, ICBA and CSC all appear to have ample data (in the form of quarterly or semi-annual financial and narrative reports) to allow the national centre organizations to meet the monitoring and reporting requirements in their contribution agreements. CPP concurs that they have adequate information in reports from national centres to ensure they are meeting their requirements under their contribution agreements. Given all the challenges experienced regarding reporting and monitoring, it is interesting to note that several PCH respondents emphasized that their main concern was adequate reporting against outcomes, rather than activity and output indicators. These respondents expect that the new templates being developed will reflect this focus.

However, there is no system in place to organize the performance measurement indicators collected by the national centres. A CPP representative reported that indicators that are collected by national centres are reported in quarterly reports that are provided to PCH by Volunteer Canada and Imagine Canada. Data that does not originate with national centre organizations would be provided mainly through program evaluations. Without a central database, it will be difficult to effectively monitor progress towards CVI’s outcomes identified in the Accountability Framework and for the summative evaluation. Linking indicator collection with the ICBA, CSC,

and KDC reporting process would facilitate development of such a system. Ideally, such a system could take the form of a Web-based tool.

The overall message regarding reporting and performance measurement from evaluation respondents of all types was that the capacity of voluntary sector organizations to carry out data collection, performance measurement and reporting varies according to the size, experience, skills and level of maturity of the organization. Respondents say that currently there is no flexibility in the level of reporting requirements according to an organization's capacity to produce these reports. For those organizations with limited capacity, respondents indicate that the result is a greater proportion of the project dollars going to reporting and less time/resources being allocated to the project itself. At the same time, respondents say that many individuals within these organizations tend to volunteer their time in order to meet the objectives of the project and reporting requirements simultaneously.

3.0 Conclusions, Recommendations and Management Response

3.1 Conclusions

The following conclusions are based on the findings of the formative evaluation of the CVI:

Design

- The CVI rationale is well defined and understood by all those interviewed, including funding recipients of the various national centres. The interviews and national centre work plans also provide ample evidence that the program logic is sound and that the activities being undertaken can be plausibly expected to lead to the desired outcomes.
- However, the CVI is reaching a point where some alterations in program design might be appropriate. The area of redesign that received the most support would involve a refocus of efforts towards integrating project results into organizational practice. Other areas noted as requiring support include increasing the independence and capacity of local networks and increased efforts in the area of knowledge management.

Delivery and implementation

- *Delivery approach.* The decentralized delivery approach of the CVI was found to be generally sound and considered effective by respondents. Positive feedback was received regarding the management and communications for CVI on the part of CPP and national centres. No obvious alternatives were identified that could achieve the outcomes in a more cost-effective manner.
- *Governance.* While the CVI's governance mechanisms are viewed as appropriate, interviewees identified the need for the SMC to play a more strategic, rather than operational, role. Improvements in communications and information sharing were also called for *between* the CVI's various administrative, decision-making and advisory bodies.
- *Partnership between government and voluntary sector.* Government representatives believe that the CVI represents a unique partnership approach to programming which recognizes the contribution of the voluntary sector. Most voluntary sector respondents were quick to point out that the CVI had resulted in a unique and collaborative relationship with the government. However, they also tended to question whether a true partnership could ever be possible between a funder and funding recipient.

Progress towards the achievement of results

- The evaluation found evidence that progress is being made towards the achievement of activities, outputs and immediate outcomes in all key program areas, albeit with some lags in dissemination and knowledge transfer.
- For example, fourteen networks have been established (one at the national level and one in each province and territory). Promotional activities developed to date include promotional campaigns, media interviews and conference presentations. Research and pilot activities have been supported via the identification of key themes, the funding of projects, and the receipt and review of reports/tools.
- While it is generally too early to make conclusive statements about progress towards the achievement of intermediate and ultimate outcomes, 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. That is because: a) the CVI Accountability Framework was just developed and implemented early in 2004-05; and b) national centres are currently introducing changes in their reporting procedures.
- CPP respondents recognized the need for an electronic database to facilitate gathering, synthesizing and reporting of results for the Initiative for monitoring and evaluation purposes. Concerns were raised that existing report formats make the rolling up and accessibility of data pertaining to overall CVI outputs and outcomes difficult and time consuming.

3.2 Recommendations and Management Response

The evaluation makes four recommendations, as follows:

1. CPP should work with other members of the Strategic Management and Coordination Committee (SMC) to strengthen the strategic governance role of the committee.

The role of the SMC in the overall management and direction of CVI should be considered in light of the fact that the Initiative is in its fourth year. In particular, there is an opportunity for the SMC to shift from their traditionally operational focus to a more strategic one (e.g., consideration of the influence of national volunteerism trends on CVI and vice versa, development of an annual statement on volunteerism, taking a long-term focus for the future of CVI, encouraging dialogue amongst CVI administrative, decision-making and advisory bodies).

Management Response: Recommendation accepted.

Following a discussion at the September 15, 2005, meeting of the SMC, it was agreed that the committee should be more strategic in its focus. The first opportunity to change this focus will be in November when the SMC will develop a Strategic Plan for the CVI.

At the beginning of the CVI, it was necessary for the SMC to be a decision-making body in order to facilitate the creation of various elements of the CVI. That stage has passed and the SMC has agreed that its role needs to be focused on setting the strategic direction of the CVI. To start, the SMC will develop a strategic plan that will outline how best to achieve the expected results of the CVI; how to position the CVI so that it is recognized as a key contributor to communities; how the CVI should respond to trends in volunteerism and to issues faced by volunteer-involving organizations; and how best to share information among CVI stakeholders and committees.

Implementation Schedule: November 28, 2005 - Develop a CVI Strategic Plan, in consultation with other CVI stakeholders and ongoing.

2. CPP should undertake consultations with its key stakeholders with a view to developing possible program design alterations.

It is recommended that consultations be undertaken that include representatives from the national centres, local network host organizations, local network coordinators, and local network members, national centre advisory committee members, SMC members, and CPP. Other outside organizations could also be consulted. Potential areas of focus for the consultations may include implementing a mechanism that supports voluntary sector organizations' use of research and tools developed through CVI-funded projects, strategies for knowledge transfer/management, and evolving roles for local networks.

Management Response: Recommendation accepted.

The design of the CVI is built around consultation and exchange of ideas. This practice has already resulted in changes to the program, such as the revision in the strategy of the Knowledge Development Centre, which has become more focused on the transfer of knowledge as opposed to the dissemination of reports. For example, due to feedback from the local networks, the Centre has concentrated on making information more accessible both in format and in language. This work will continue via planned consultations with researchers. Another example would be the decentralization of capacity funds to local networks by the Information, Capacity Building and Awareness Centre. CPP will continue to work with all three national centres, the 13 local networks and the National Network of Volunteer-Involving Organizations. The SMC and other key stakeholders are to discuss and develop possible program design alterations.

CPP consulted with its stakeholders on a regular basis and, as a result of this work, implemented changes to the program design of the CVI. In the fall and winter of 2005-06, CPP will undertake a series of consultations to discuss possible changes in the three areas outlined in the formative evaluation and any proposed changes coming out of the strategic planning meeting of the SMC.

Implementation Schedule: CPP will be consulting stakeholders regarding program design alterations in preparation for program renewal in 2007 and ongoing.

3. CPP should design an electronic database that will facilitate data gathering, synthesis and reporting of results for CVI.

Ideally, an electronic (e.g., Web-based) database would be developed that is accessible to local network hosts and coordinators (for the purposes of data entry and basic reporting capabilities), and CPP and national centres (for the purposes of data entry and advanced reporting capabilities). All appropriate financial data and results indicators could be provided to national centres and CPP through this mechanism.

Management Response: Recommendation accepted with modification.

CPP will work with its key stakeholders to improve data gathering, though not necessarily via the creation of a Web-based electronic database.

CPP currently gathers much of its data in electronic format via quarterly reports from the national centres which in turn have gathered data from the local networks. These reports, presented via a reporting table, have been submitted over the past year. The program will now dedicate resources to compiling information from these reports to create an amalgamated annual report. There are three challenges in the creation of an electronic database for the CVI. The first is that there is a lack of technological capacity in some regions to access an electronic database, particularly in the North. Secondly, the Initiative has little requirement to manipulate quantitative data in order to monitor progress toward results; much of the data collection will be qualitative in nature. For example, the progress of the Nunavut local network in official language outreach is not readily comparable with that of Manitoba local network as each start from an entirely different base. Thirdly, the local networks are third party recipients managed by Volunteer Canada and it would be inadvisable for Canadian Heritage to ask local networks to utilize a departmental data gathering system if it wishes to protect its arms length relationship.

Implementation Schedule: November 2005 - Start process.

4. CPP should continue to work with the national centres to ensure adequate ongoing monitoring, reporting and assessment of CVI activities, outputs and outcomes.

While the formative evaluation found that centres are reporting on the indicators identified in the Accountability Framework, reporting templates continue to be adjusted as the national centres receive feedback from users. Thus, CPP should continue to work with national centres to ensure that the reporting templates continue to meet the needs of the Department. As well, in preparation for the summative evaluation, CPP should ensure that appropriate existing data sources for performance indicators pertaining to outcomes that were not a main focus of the formative evaluation (e.g., intermediate outcomes related to increased awareness, understanding and organizational capacity) are available for use during the summative evaluation.

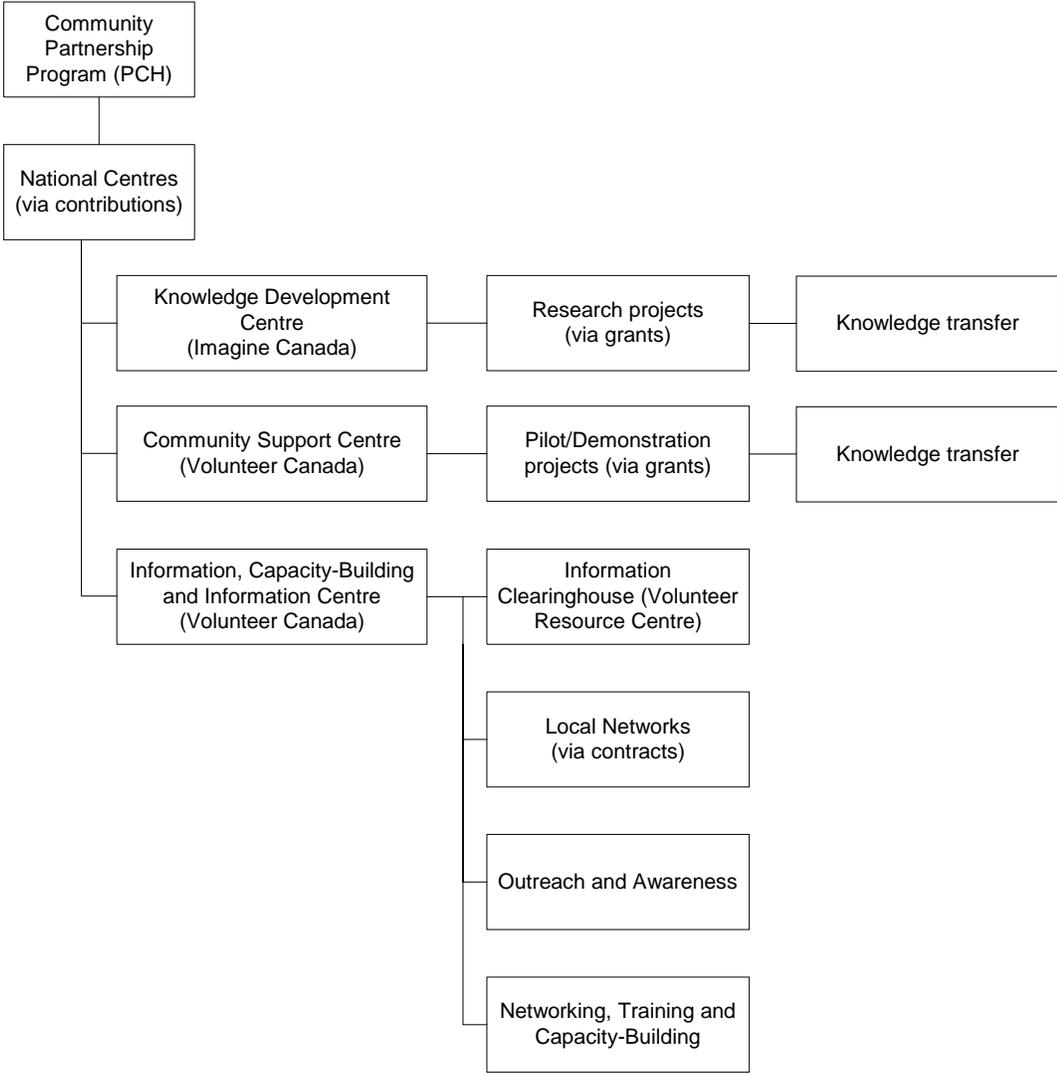
Management Response: Recommendation accepted.

This has been, and will continue to be, a major activity for CPP.

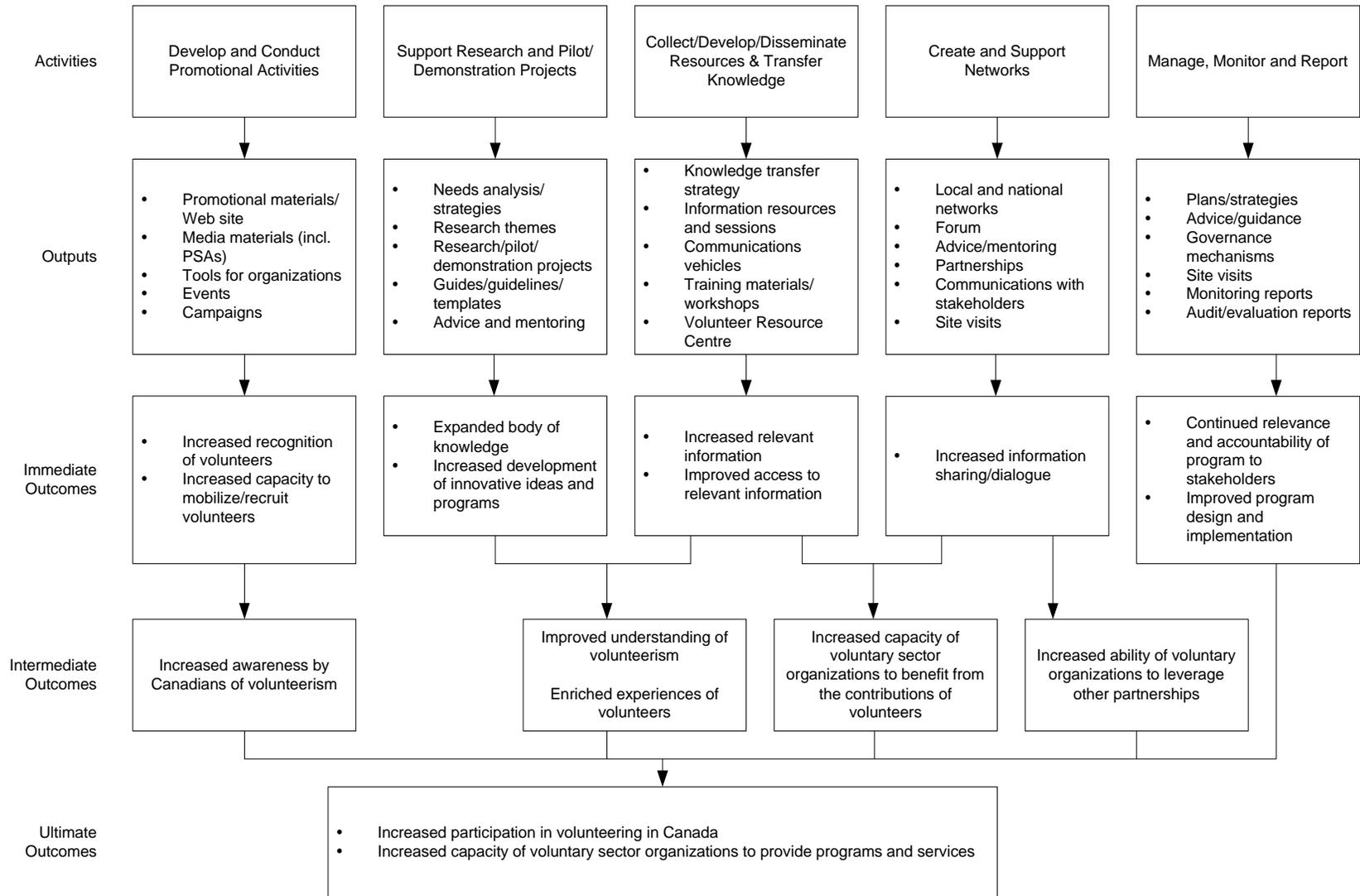
CPP meets regularly with all national centres representatives to discuss all issues related to CVI, including reporting on results. It is the intent of CPP to continue to work closely with the national centres and all key CVI stakeholders to ensure ease of reporting.

Implementation Schedule: Ongoing.

Annex A: CVI Delivery Approach



Annex B: CVI Logic Model



Annex C: CVI Evaluation Matrix

Exhibit C.1: Evaluation Matrix

Evaluation Issues and Questions	Indicators (for Formative Evaluation)	Document Review	Key Informant Interviews	Interviews with Funded Recipients	File review/ Interviews with Non-funded recipients	File Review of funding recipients	Admin System and Database Review
<p>1. Has the CVI been designed appropriately for achieving the target outcomes?</p> <p>(Relates in part to outcome: Improved program design and implementation)</p>	<ul style="list-style-type: none"> • Logical links between objectives, activities and target outcomes • Target outcomes are clearly described • Resource allocation is logically linked to program priorities • Number, type and perceived adequacy of communication mechanisms and channels • Key informants indicate the CVI has been designed appropriately for achieving the target outcomes • Key informants identify alternate ways to achieve the target outcomes • Key informants indicate that CVI is designed and implemented to meet the needs of voluntary sector organizations (including management, governance, funding criteria, delivery, communications, etc.) 	✓	✓	✓	✓		
<p>2. Is the CVI being implemented as planned?</p> <p>(Relates in part to outcome: Improved program design and implementation)</p>	<ul style="list-style-type: none"> • Extent to which changes to program design, management, resourcing, governance, funding criteria, and implementation have been made and why • Resources/expenditures • Description of activities/outputs • Challenges encountered in implementation and solutions proposed and implemented • Key informants explain pros and cons of discrepancies between implementation plan and actual • Extent to which projects funded represent a cross-section by region, official language, ethnocultural community • Extent to which roles are well understood by all players (PCH, SDC, VC, CCP, NAC, local network heads, LN organizations, LN members) • Time to approve funding and perceived adequacy • Perceived adequacy of funding criteria by applicants 	✓	✓	✓	✓	✓	

Exhibit C.1: Evaluation Matrix

Evaluation Issues and Questions	Indicators (for Formative Evaluation)	Document Review	Key Informant Interviews	Interviews with Funded Recipients	File review/ Interviews with Non-funded recipients	File Review of funding recipients	Admin System and Database Review
3. What tangible progress can be identified toward achieving the expected outcomes?	<p>Immediate outcomes:</p> <p>Increased recognition of volunteers</p> <ul style="list-style-type: none"> • Feedback from organizations • #, type of recognition events/ programs <p>Increased capacity to mobilize/recruit volunteers</p> <ul style="list-style-type: none"> • Feedback from organizations, national centres regarding usefulness of materials and tools • Participation rates in projects funded by CVI <p>Expanded body of knowledge</p> <ul style="list-style-type: none"> • # application guidelines or forms downloaded • #, type of projects funded • Existence of reports/ findings <p>Increased development of innovative ideas and programs</p> <ul style="list-style-type: none"> • #, type of products/programs • Feedback from organizations • Gaps regarding research themes identified by local networks <p>Increased relevant information</p> <ul style="list-style-type: none"> • #, type, distribution of documents, resources • Feedback from organizations on satisfaction with info/training sessions, materials/documents <p>Improved access to relevant information</p> <ul style="list-style-type: none"> • # documents available online, from clearinghouse • Feedback from organizations <p>Increased information sharing/ dialogue</p> <ul style="list-style-type: none"> • Feedback from organizations regarding satisfaction with sharing/level of input/advice • #/type/role of partnerships/collaborations • Other evidence of dialogue in documents/files 	✓	✓	✓		✓	✓

Exhibit C.1: Evaluation Matrix

Evaluation Issues and Questions	Indicators (for Formative Evaluation)	Document Review	Key Informant Interviews	Interviews with Funded Recipients	File review/ Interviews with Non-funded recipients	File Review of funding recipients	Admin System and Database Review
3. What tangible progress can be identified toward achieving the expected outcomes? (Continued from previous page)	<p>Intermediate outcomes</p> <p>Increased awareness by Canadians of volunteerism</p> <ul style="list-style-type: none"> • #, type of projects/ outcomes of projects aimed at raising awareness (including Campaigns) • Feedback from organizations <p>Improved understanding of volunteerism</p> <ul style="list-style-type: none"> • Feedback from organizations <p>Enriched experiences of volunteers</p> <ul style="list-style-type: none"> • Feedback from organizations • Review of event evaluation form analysis <p>Increased capacity of voluntary sector organizations to benefit from the contribution of volunteers</p> <ul style="list-style-type: none"> • Feedback from organizations regarding increased capacity, usefulness of materials, etc. <p>Increased ability to leverage other partnerships</p> <ul style="list-style-type: none"> • Feedback from organizations • File review reveals partnerships <p>Ultimate outcomes</p> <p>Increased participation in volunteering in Canada</p> <ul style="list-style-type: none"> • Statistics from documents <p>Increased capacity of voluntary sector organizations to provide programs and services</p> <ul style="list-style-type: none"> • Feedback from organizations 	✓	✓	✓		✓	
4. 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?	<ul style="list-style-type: none"> • Challenges with implementation and the related solutions are identified in CVI documentation from PCH, Volunteer Canada and CPP • Key informants identify challenges and solutions and how they have hindered/ contributed to the achievement of target outcomes • Unintended impacts of CVI 	✓	✓	✓	✓	✓	

Exhibit C.1: Evaluation Matrix

Evaluation Issues and Questions	Indicators (for Formative Evaluation)	Document Review	Key Informant Interviews	Interviews with Funded Recipients	File review/ Interviews with Non-funded recipients	File Review of funding recipients	Admin System and Database Review
<p>5. What mechanisms have been put in place to collect data and monitor the performance of the Initiative? Are these mechanisms appropriate?</p> <p>(Relates in part to outcome: Continued relevance and accountability of the program to stakeholders)</p>	<ul style="list-style-type: none"> • Systems and databases are in place and functioning at PCH, Volunteer Canada and CPP • Indicators for target outcomes have been identified and implementation of data collection mechanisms has begun (at project level as well as at national centres) • Appropriateness of indicators as judged by external expert • Appropriateness of systems and databases as judged by external expert • Appropriateness of frequency, content and quality of reports as judged by external expert • Roles and responsibilities for data collection have been communicated and are well understood by all players • Key informants indicate that data collected and available to them meets their needs • Adequacy of funding available for collecting data to monitor performance • Data and documents currently available enable adequate judgment of CVI progress to date 	✓	✓	✓		✓	✓

Annex D: List of Interviewees and Files Reviewed

List of Interviewees

Key Informants

CVI managers at PCH national headquarters;

- Suzanne Clément, Director General, Citizenship Participation and Promotion
- Robin Leckie, Manager, CVI

Heads of the national centres – Volunteer Canada and Imagine Canada

- Volunteer Canada
- Imagine Canada

Local network coordinators

- Moncton Volunteer Centre (Moncton)
- Réseau de l'action bénévole du Québec (Montréal)
- Coordinator Ontario Network, Professional Administrators of Volunteer Resources – Ontario (PAVR-O) (Toronto)
- Coordinator, Alberta Network, Volunteer Alberta (Calgary)
- Coordinator NWT Network, Sport North Federation (Yellowknife)

Local network members/representatives

- Members of the New Brunswick Network Board (n=2)
- Representatives of the NB Network host organization (n=2)
- Members of the Quebec Network Board (n=2)
- Members of the Advisory Committee of the Ontario Network (n=9, group interview)
- Members of the Alberta Network (n=2, 2 interviews)
- Representatives of the Alberta Network host organization (n=2)
- Members of the Executive Committee of the NWT Network (n=4, group interview)

Representatives of the national advisory committees for the Community Support Centre and Knowledge Development Centre (2 interviews, one from each committee);

- KDC
- CSC

A representative of the Network of National Volunteer-Involving Organizations (NNVIO) (1 interview);

- Canadian Blood Services

Co-chairs of the Strategic Management Coordination Committee (SMC)

- Volunteer Canada
- CPP

Other members of the SMC

- Local Network Member, BC
- Local Network Member, Newfoundland and Labrador

Two representatives of Social Development Canada (SDC)

- Marie Gauthier, Director, Volunteer Sector Affairs Division, (also sits on SMC)
- Marilyn Collins, Senior Program Advisor, Non-Profit and Voluntary Sector Affairs Division

Funding Recipients

- Le Réseau communautaire de la Société franco-manitobaine (RSF)
- Ecology North
- Planned Parenthood Federation of Canada
- North East Ontario Consumer/Survivor Network
- Big Brothers and Big Sisters of St. Catharines and Throrold and District.
- Association québécoise des centres communautaires pour aînés
- Nanaimo Volunteer Information Centre
- Aids New Brunswick/SIDA Nouveau-Brunswick
- Wikwemikong Development Commission
- The Hospice Palliative Care Association of Prince Edward Island
- Social Planning Council for the North Okanagan
- York University
- Canadian Red Cross
- University College of Cape Breton
- University of Winnipeg
- Hope and Cope

Exhibit D.1 presents the funding year for the KDC, CSC and ICBA (capacity-building) projects for which interviews were conducted as well as the relative size of the funding amount. The definitions for small, medium and large projects vary by type of project since the ICBA capacity-building projects tended to be much smaller overall than the other centres.

Exhibit D.1: Breakdown by Funding Year and Amount for Funding Recipient Interviews

Recipient Type	Funding Year			Funding Amount*		
	2002/03	2003/04	2004/05	Small	Medium	Large
KDC (5)	1	2	2	0	1	4
CSC (6)	**	3	3	1	2	3
ICBA (5)	**	5 ***		1	3	1
Total	1	10	5	2	6	8

* For KDC and CSC, small funding amount = less than \$20K; medium funding amount = \$21K to \$40K; large funding amount = more than \$40K. Please note that KDC and CSC funding criteria do not require a mix of funding amounts, but rather a ceiling of \$60K per project. For ICBA, small funding amount = less than \$1000; medium funding amount = \$1001 to \$5K; large funding amount = more than \$5K.

** CSC and ICBA did not fund any projects in 2002-03.

*** Evaluators were only provided with project names and files for the 2003-04 fiscal year.

List of Files Reviewed

Funding Recipients

The national centre files reviewed were:

1. Community Support Centre
2. Knowledge Development Centre
3. Information, Capacity-Building and Awareness Centre

The host organization files reviewed were:

1. Volunteer Centre of Winnipeg-Manitoba;
2. Nunavut Kamatsiaqtut-Nunavut;
3. Recreation Nova Scotia-Nova Scotia;
4. United Way of Regina-Saskatchewan;
5. Volunteer Vancouver-British Columbia; and,
6. Bedeque Bay Environmental Management Association-PEI.

The projects reviewed, organized by centre, are presented below:

Knowledge Development Centre

1. Recherche sur la caractérisation du bénévolat dans les loisirs et sur de développement d'outils de soutien
2. Volunteering in Youth Programs: The Impact of Psycho-Social Factors on Involvement and Commitment
3. Trends and Barriers to Volunteer Participation by People with Disabilities
4. Congregational Volunteering by Recent Immigrants: A Stepping Stone to Integration?
5. Devolution of Service Responsibilities to Municipalities
6. Aboriginal Participation in the Voluntary Sector in the Northwest Territories
7. Harbour Authority Volunteers: Between a Roc and a Harbour Place
8. The Impact of High School Mandatory Service Programs on Subsequent Volunteering and Civic Engagement
9. Core Volunteer Study
10. Understanding Low Income Volunteers: Lessons from the Front Lines

Community Support Centre

1. Linking Generations: Seniors and Youth Building Stronger Connections
2. Tools and Best Practices for Working with Youth Volunteers
3. Creating Partnerships between Schools and Community-Based Organizations
4. Nisohkum'akew – Volunteer Enhancement
5. Health Outreach with Multicultural Senior Peer Volunteers
6. High Touch-High Tech: A New Approach to Building Volunteer Opportunities
7. G I V E Georgetown Initiative for Volunteers in Education
8. Youth Volunteer Experience: Enhancing the Mandatory 40 Volunteer Hours for Secondary School Students
9. Volunteering for a Healthy Retirement

10. Increasing Volunteer Initiatives for the Chinese Community to Address Violence Against Women

Information, Capacity Building and Awareness Centre

1. Outils de promotion et de reconnaissance de l’action bénévole (Québec)
2. VCARS Volunteerism Networking and Training Event (Ontario)
3. Regional Dialogue (Ontario)
4. Community Forum – Session en française (New Brunswick)
5. Community Outreach and Volunteer Development Project (New Brunswick)
6. Volunteer Recognition Day (Nova Scotia)
7. Building organizational capacity: Recruiting, Retaining and Rewarding Volunteers (British Columbia)
8. Programme de renforcement des compétences (Québec)
9. Atelier de développement des connaissances des administrateurs bénévoles (Québec)
10. Moving Forward: Ontario Volunteer Centre Network Provincial Meeting (Ontario)

Exhibit D.2 presents a cross-walk between the files reviewed and the province where the funding recipient is located. For national organizations or KDC projects with a national scope, they are identified as “national” in the Exhibit.

Exhibit D.2: Location of Reviewed Funding Recipient Files

Recipient Type	NL	PEI	NS	NB	QC	NU	ON	MB	SK	AB	NWT	BC	YK	Ntl
National Centres (3)														3✓
Host organizations (6)		✓	✓			✓		✓	✓			✓		
KDC (10)		✓	✓				✓				✓	✓		5✓
CSC (10)	2✓	✓	✓				✓		2✓	2✓		✓		
Capacity building (10)			✓	2✓	3✓		3✓					✓		
Total (39)	2	3	4	2	3	1	5	1	3	2	1	4	0	8

Exhibit D.3 presents the funding year for the KDC, CSC and capacity building project files reviewed as well as the relative size of the funding amount. The definitions for small, medium and large projects vary by type of project since the capacity building projects tended to be much smaller overall than the other centres. Exhibit D.3 does not include breakdowns for national centres or host organizations since signed contribution agreements are for funding over all years under review (2002-03 to 2004-05).

Exhibit D.3: Breakdown by Funding Year and Amount for Files Reviewed

Recipient Type	Funding Year			Funding Amount*		
	2002/03	2003/04	2004/05	Small	Medium	Large
KDC (10)	2	4	3	0	1	9
CSC (10)	**	5	5	1	4	5
Capacity building (10)	**	10 ***		3	3	4
Total	2	19	8	4	8	18

* For KDC and CSC, small funding amount = less than \$20K; medium funding amount = \$21K to \$40K; large funding amount = more than \$40K. Please note that KDC and CSC funding criteria do not require a mix of funding amounts, but rather a ceiling of \$60K per project. For capacity building projects (via ICBA), small funding amount = less than \$1000; medium funding amount = \$1001 to \$5K; large funding amount = more than \$5K.

** CSC and ICBA did not fund any projects in 2002-03.

*** Evaluators were only provided with project names and files for the 2003/04 fiscal year.

Unfunded Applicant Files

Community support

- House of the Lord - Seniors Collecting Remembrances & Anecdotes for Presentation in Schools
- Georgetown Elementary School – Innovative Volunteerism and Volunteer Management Tools and Practices
- Bookmates Inc. - Supporting Volunteerism in Family Literacy Programs: Innovation Training and Mentorship
- Hull Child and Family Services - Developing and Increasing Volunteer Experiences

Knowledge development

- Big Brothers and Sisters of Canada - Impact on the Voluntary Sector in Canada
- Institute for Resources Environment and Sustainability - Assessing the Value of Volunteer-Centred Restoration Programs in Urban Watershed Stewardships
- MIRA Incorporated - Volunteers: Bringing Bonavista North to the World
- Persons with Disabilities Partnership of Industrial Cape Breton - Effective Board Governance

Information, capacity building and awareness

- Nature Conservancy Canada - Burnley Carmel Natural Area Site Tour
- Labrador Heritage Society - Making Government and Agency Funding Work for Us