

**Canadian Evaluation Society – Canadian Evaluation Society Educational Fund
Student Evaluation Case Competition 2012**

**Case for the Preliminary Round
February 11, 2012**

Evaluation of the Literacy Victoria Outreach Program

Welcome to the Preliminary Round of the 2012 CES/CESEF Student Case Competition!

We thank Ruth Derrick, Executive Director of Literacy Victoria for providing the material to support this case. This request for proposal is hypothetical and was developed for purely educational purposes.

SCENARIO

Your consulting firm has been invited to respond to the attached Request for Proposals issued by Literacy Victoria to evaluate the impacts of their Outreach Program.

The Outreach Program was implemented in 2007 with initial funding from the federal government, Ministry of Human Resources and Skills Development Canada. Literacy Victoria has continued and expanded the Outreach Program and now wants to carry out a comprehensive assessment of the impact the program is having on the targeted population of learners and partner community organizations. The Chair of the Board of Directors and the Executive Director of Literacy Victoria will be reviewing the evaluation proposals. They are interested in learning about the overall strategy you propose for conducting this evaluation and the challenges that you anticipate and how you might address them. Based on the submissions, they will select the three finalist teams to be given further consideration for the “contract” award.

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

The CES Student Case Competition Working Group:

Bea Courtney, Helen Hsu, Geneviève Landry, Brian McGowan, Patricia Rice, Caroline Vallée

RULES

1. Case Competition organizers will email the designated contact person for the team (coach or team member) to give them a website address and team identification number to retrieve the case document.
2. Teams can begin work on the case as soon as they receive the document from the contact person.
3. The submission must be uploaded either as an MS Word, WordPerfect or PDF file to the same website **no later than 5 hours and 30 minutes** after the contact person for the team downloads the case from the website.
4. Coaches must not communicate with their teams once the case document has been downloaded and distributed to the team.
5. Judges must not know the real identity of the teams. Throughout their submission, teams should identify themselves only by an imaginative, non-revealing code name, such as Noble Consultants and must not identify the city where the team is located.
6. Your submission should be saved as your team name (e.g. Noble_Consultants.pdf).
7. Judges may take up to one month to select the three best submissions and provide feedback to each team.

JUDGING CRITERIA

Section 3.0 of the attached RFP sets out more details on the expectations for proposals. The criteria by which submissions will be assessed are as follows:

Criteria	Weight
Demonstration of an understanding of the Literacy Victoria Outreach program	5%
Appropriateness of the logic model	10%
Clarity, completeness and appropriateness of evaluation matrix	25%
Appropriateness of (and rationale for) the evaluation design, data collection and analysis plan	20%
An assessment of challenges and how these will be addressed	15%
Quality of the draft information collection tool	10%
Innovative ideas or detailed practical suggestions	5%
Quality of the proposal (writing and presentation)	10%
Total	100%

Questions or Problems

To communicate with organizers on the day of the competition, please call one of the following or email casecomp@evaluationcanada.ca

Name	Telephone Number	Times Available (EST)
Patti Rice (enquiries in English)	709-746-2875	8:00 am to 6:00 pm
Geneviève Landry (enquiries in French)	418-681-9433 Cell: 581-982-5866	8:00 am to 5:00 pm

Have fun and good luck!

Request for Proposals:

Evaluation of Literacy Victoria Outreach Program

February 11, 2012

1.0 Overview of Literacy Victoria

Literacy Victoria (<http://literacyvictoria.ca>), formed in 1988, is the main community-based literacy services organization for adults in Victoria, British Columbia and across southern Vancouver Island. Literacy Victoria offers people over age 18 free help and support in basic reading, writing, math, computer and other essential skills. Currently there is a staff of seven and the organization is led by a volunteer Board of Directors.

Literacy Victoria's vision is "To be the first place that people go for basic literacy services and to be the first place people go for information about adult literacy". The organization's mission is:

To provide free help and support in basic reading, writing, mathematics, and essential skills in an increasingly technical world.

We help adults develop the self-esteem and life skills necessary to participate effectively at home, at work, and in the community.

1.1 Literacy Victoria Services

Literacy Victoria's core service is the Learners' Network which pairs learners with a network of volunteer tutors to address learning goals specific to the individual (i.e. they do not follow a set curriculum or do tests). These goals might include writing an e-mail or a letter; taking their written driver's test; completing an on-line course; improving their spelling; preparing to enter the workforce. One-on-one tutoring sessions are held at Literacy Victoria premises or at a variety of other community facilities. In addition to matching and working with Learner-Tutor pairs, the Learners' Network provides a variety of additional activities for both Learners and Volunteers at Literacy Victoria. In 2010, an LV Book Club was started, and each month several successful "Love of Learning Fridays" ran on topics from Residential Tenancy Rights to Holiday Wreath making. A group of volunteers are now LV Computer Lab Assistants. They help learners in the lab, and support a strong learning focus for lab users. In addition, weekly computer activities now support purposeful learning there.

Over the past 5 years, Literacy Victoria has been offering Aboriginal literacy initiatives in partnership with First Nations communities in the region, including the Aboriginal Tutor Training Program and the Aboriginal Literacy and Essential Skills Pilot Project.

The Outreach Program, which is the subject of this RFP, is described in the following section.

2.0 Outreach Program

The Literacy Victoria Outreach Program was started in 2007. The program resulted from a recognition that many of the most marginalized citizens in the community had low literacy skills but were not using Literacy Victoria services. These adults face persistent barriers to accessing learning opportunities, including poverty, homelessness, addictions, and incarceration. It was felt that by offering free literacy activities that were relevant to them, in settings where they already sought help - shelters, food banks – that they could become more engaged as learners.

The Outreach Program involved establishing partnerships with human service organizations in the community with which Literacy Victoria had no previous service linkages.

The program was developed following a comprehensive needs assessment process conducted in 2006. The assessment process was carried out by a program coordinator who spent time building linkages with potential partner organizations – including a shelter for women who experience violence, an emergency shelter for homeless individuals, the local food bank, the John Howard Society, and a family resource centre. The coordinator spent time at their sites and interacted with their client base. The focus of the assessment was on getting to know the people using the services of these organizations and their literacy needs and interests, as well as collaborating with the staff of these organizations to develop an understanding of the most relevant ways of providing literacy services for the clients of each organization.

The assessment confirmed that clients of each of these partner organizations were not accessing traditional learning programming. The assessment also confirmed the need to tailor the literacy services to each site and client group. Based on this assessment, Literacy Victoria applied for and obtained funding for two years (2007-08 to 2008-09) from the federal government Adult Literacy and Essential Skills Program (ALLESP) to develop and implement the Outreach Program. Since 2009, the program has been continued with the same goal and objectives as set out below and with funding from other corporate and charitable foundation sources.

2.1 Program Goal, Objectives and Targeted Participants

2.1.1 Program Goal

The overall goal of the Literacy Outreach Program is to provide integrated literacy and learning support to marginalized individuals in the community who face persistent multiple barriers to participating in learning opportunities, and to enable these individuals to set and work towards their personal literacy goals. The program offers adults free help with math, reading, writing, computers and life skills. Instead of waiting for people to come to Literacy Victoria, the

Outreach Program offers literacy services at community agencies used by adults coping with multiple life challenges including low skill sets. The program also encourages referrals for people who want to come to Literacy Victoria for continuing help.

2.1.2 Program Objectives and Target Participants

The Outreach Program has three specific target groups and objectives related to each group. These are adult learners, community organizations and the broader community.

Adult learners: From a learner perspective the aim is to work with learners ‘where they are at’ by offering tailored individual or group learning opportunities – based on their learning needs and interests. The Outreach Program does not provide the classroom-based or tutoring learning opportunities offered by Literacy Victoria in its other programs. Other than the tutoring program at a correctional centre, most of the activities provide less structured literacy programming (see section 2.3). One lesson learned through the assessment process and through implementation of the program is that the target population of learners is as diverse as any other. The initial concept of the program was that it should focus on literacy ‘survival’ tasks including scanning personal documents for electronic storage and completing government forms. The assumption was that literacy programming for adults struggling with poverty, homelessness and unemployment would have to be relevant to the most immediate survival needs. It was learned as part of the assessment that, although task-oriented literacy activities are appealing for some, for others the main appeal is to participate in activities that offer other tools for self-expression, creativity, personal growth, or temporary escape from boredom or personal difficulties. This is reflected in the array of services described in section 2.3.

Community organizations: From an organization perspective, the Outreach Program has a broad objective of creating awareness among the staff of partner organizations of the potential contributions of both core literacies (reading, numeracy and communications) and applied literacies – health, IT, civic and pre-employment essential skills – to their clients’ progress as they learn to more effectively play roles as productive workers, active citizens and contributing members of healthy families and communities. As Literacy Victoria delivers its Outreach services at the sites of each of the partner organizations, they help the partner organizations recognize literacy issues, respond to disclosure of literacy difficulties, and develop a clearer understanding of their clients’ literacy needs. The aim at an organizational level is to create an explicit commitment of partner organizations to the infusion of literacy and learning in their strategic objectives and the related organizational policies and practices. For example, the program has involved a strong partnership with the local library and has resulted in the library removing systemic access barriers such as the requirement for people to have a home address in order to borrow books.

Broader community: The program also has established a broad objective of building linkages among community organizations that serve this marginalized population. The intent is to explore ways of collaborating to ensure access to literacy services and integration of literacy into the continuum of services for this population. To this end, Literacy Victoria held two forums, each with upwards of 50 attendees from community-based organizations, during and at the end of the ALLESP project funding. The purpose of the forums was to develop awareness of the need for this kind of integrated approach to programming in the broader community and to facilitate partnerships which support this approach.

2.2 Resources

Once the program was designed, a Literacy Outreach policy and training manual was developed and volunteer outreach helpers were engaged and trained. The training covered topics such as the principles of literacy outreach, outreach volunteer-learner relationship, and dealing with difficult situations. Currently there are 15 Outreach helpers, divided into small teams. Each team is specific to a certain outreach site (such as the prison) and is overseen by a Volunteer Coordinator for that site. All of the outreach services and related supplies are provided at no charge to either the organizations or their clients. The only request is a small amount of space within each site to hold the literacy activities. Literacy Victoria collects information on the number of clients using each of the Outreach services.

2.3 Outreach Services

The Outreach Program currently offers the following services:

- At the Sandy Merriman Emergency Shelter for Women (www.coolaid.org/smh), a creative writing group was requested by the residents. This is facilitated every Monday evening by a Literacy Victoria volunteer with from four to six participants. In addition to writing and sharing their poetry and reflections, the participants have created an e-zine of their work which is distributed via the website and through shelters and other organizations in the community.
- Inmates with low literacy skills at the Vancouver Island Regional Correctional Centre can now receive one-to-one tutoring from trained Literacy Victoria volunteers during their incarceration. This pilot project supports the large number of men unable to take part in the prison's rehabilitative programs due to their low skill level. It also enables them to follow-up with similar services when they are either released back into their home communities, or transferred to another institution. Over 40 inmates have been tutored since the pilot started over a year ago.

- The popular Bookmobile does a once weekly circuit of 10 sites - shelters, the Food Bank, social service drop-in sites, and the Songhees Nation - lending books to people of all ages and interests. Literacy Victoria also maintains Bookshelves at several of these sites. Since this service began, over 7000 books have been borrowed, and many books have been delivered in response to requests for specific authors and/or subjects. A recent Victoria Times newspaper article profiled the bookmobile services and its contributions to the community:
http://www2.canada.com/victoriatimescolonist/news/capital_van_isl/story.html?id=4a321192-a5a5-48f5-ae4d-411881184195
- A new Outreach program was launched in 2011. Every week, Literacy Victoria's "Mobile Computer Lab" takes technology and computer assistance to marginalized people in city shelters and transitional housing throughout the community. Several hundred individuals have been assisted by this program since its inception.

Other Outreach services include:

- In 2008, Outreach volunteers helped over 3,000 homeless people address and mail Christmas cards to families/friends as a way of connecting with them.
- The Streetlink Shelter Movie Night/Discussion was offered for two years. The 2008-09 Literacy Victoria Annual Report noted that there was good attendance, and many clients suggesting titles for viewing. Others had tracked down some of the lesser-known films that they thought the group would enjoy. That year there were 1,337 participants in the Movie Nights and a total of 49 movies were shown. The most popular movie was An Inconvenient Truth (Al Gore).
- Homeless people or those without computers are offered an e-portfolio service – important life and training documents they have are scanned and housed on a LV computer for safe keeping, and are accessible from any computer. Over two dozen individuals have used this service for document safekeeping.

2.4 Program Impacts

A formative evaluation of the Outreach Program was carried out in 2008 as part of the federal funding requirements. The evaluation found that informants from the partner organizations were very supportive of the Outreach Program and hoped to see it continue and grow. It was also considered to be having positive impacts for the targeted learner population, although the evaluation did not gather feedback directly from learners.

Now that the federal funding is completed, data on the number of clients accessing outreach services are maintained (see section 2.3) but no demographic or contact information is maintained on individual clients. While no formal evaluation has been conducted since the formative evaluation in 2008, anecdotally there is a sense that the Outreach Program has had a significant impact on several fronts:

- The organization's Board of Directors, staff and volunteers have greater awareness of and preparedness to assist the community's most marginalized population with literacy services.
- Partner organizations appear to have a greater understanding of their clients' literacy needs and how literacy programming can be offered in an integrated way within their organization's other services.
- Informal feedback from adults participating in various activities and using Literacy Victoria outreach services has been positive and it appears that more are engaged in learning. However, for many low literacy level learners, this is seen as a first step in a long process.
- The forums held by Literacy Victoria have helped develop collaborations among community-based organizations to remove systemic barriers to accessing literacy services in the wider community.

3.0 Evaluation Objectives

It is expected that the evaluation will assess program relevance, design, delivery and impacts.

In particular, Literacy Victoria is interested in hearing the feedback from the adult learners who use the Outreach services. They realize that there will be a number of practical and ethical challenges and considerations in making contact with learners and obtaining their input. They are asking teams to clearly set out the challenges they foresee and how they would overcome these.

3.1 Proposal Requirements

Literacy Victoria expects proposals from the responding teams to provide (but not be limited to):

- An overview of your understanding of the Literacy Victoria Outreach Program and its relevance to the community.
- Program logic model.
- An evaluation matrix including the evaluation questions, indicators and proposed data sources.
- A brief description of your evaluation design and rationale for this approach.
- A brief description of each of the data collection methods you propose and your rationale for each method.
- Anticipated challenges for conducting the evaluation and how you propose to deal with these through your methods.
- For one of the Outreach services set out above in section 2.3, provide a sample of a data collection instrument you would use to gather information from learners and briefly describe how you would administer it. We suggest this be a maximum of two pages.

Literacy Victoria does not require proposals to include a budget. A budget of \$20,000 has been allocated which is expected to cover an estimated 30 to 40 days of consultant time plus other costs.

Proposals (including the sample data collection instrument) **must**:

- be no longer than twelve (12) pages. This limit excludes the cover letter, cover page and table of contents. **Text over 12 pages, including any appendices, will not be read or scored.**
- use a font size of at least 12 pt. Times New Roman or equivalent.
- 1 inch margins (top, bottom, left and right sides).
- use 8 ½” x 11” paper.
- However, please note that tables, charts and the logic model can have a font size of a minimum of 10 pt. and have margins less than 1 inch.

3.2 Judging Criteria

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

Criteria	Weight
Demonstration of an understanding of the Literacy Victoria Outreach program	5%
Appropriateness of the logic model	10%
Clarity, completeness and appropriateness of evaluation matrix	25%
Appropriateness of (and rationale for) the evaluation design, data collection and analysis plan	20%
An assessment of challenges and how these will be addressed	15%
Quality of the draft information collection tool	10%
Innovative ideas or detailed practical suggestions	5%
Quality of the proposal (writing and presentation)	10%
Total	100%