

**Advancing
The
Community
Strengthening
By
The Voluntary Sector**



**Report on the
2001 Community Consultation
Social Planning Council of Ottawa-Carleton**

August 15, 2001

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Introduction

On June 12th 2001, the Social Planning Council of Ottawa held its third annual community consultation. Over 130 participants including staff, board members and volunteers of community organizations took part in a collective information and dialogue session.

This year, the consultation focused on strengthening our individual organizations and the voluntary sector as a whole. The topics of discourse were the trends in fundraising and funding diversification, the trends in networking and partnership building, and the changes in society affecting the voluntary sector. More specifically, through four consultation workshops the key questions asked were how to strengthen our fundraising capacity, how to strengthen our volunteer involvement capacity, and how the volunteer sector can better support advocacy initiatives. The afternoon session was dedicated to a dialogue session with City staff on the theme of People Services in the new City and how the voluntary sector and the City can best work together for the benefit of residents.

By holding this event, the SPC supported the community in the assessment of community needs and the identification of solutions. As well, it fostered the development of collaborative work between the City of Ottawa and community agencies. In short, this report illustrates how the voluntary sector is responding to emerging trends and social changes. It provides an accurate overview of the barriers and the strategies as well as the next steps for the improvement of organizational capacity.

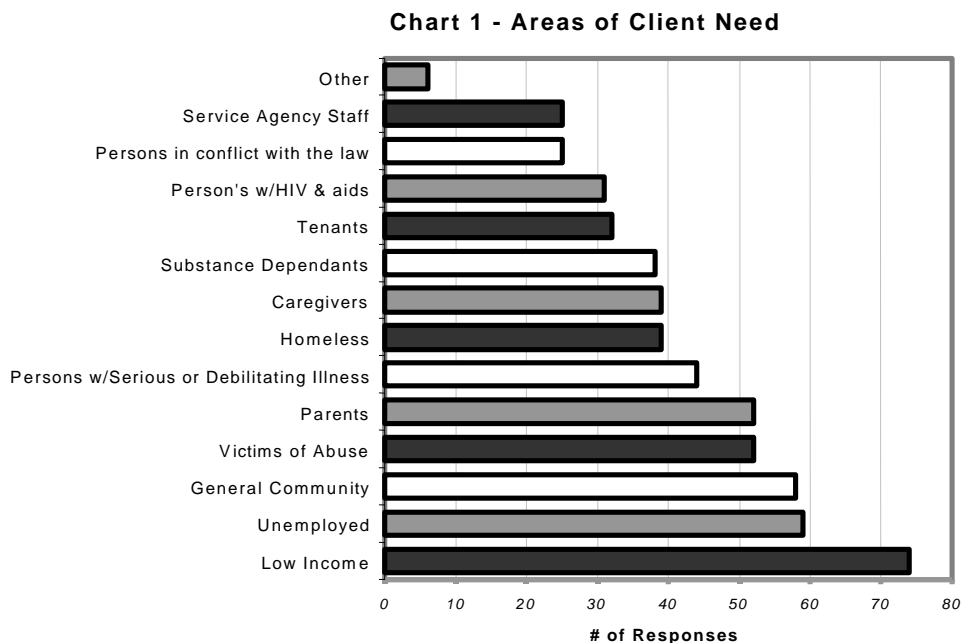
1. Community Agency Survey Results

Presentation by Tracey Lauriault, Social Researcher, Social Planning Council

In late 1999, the Social Planning Council of Ottawa-Carleton sent a survey to 548 community agencies in Ottawa.¹ The purpose of the survey was to provide a snapshot of the impact of service system restructuring, to share challenges and creative solutions, and to identify supports needed by the community agencies. 167 agencies responded to the survey. The results of the Community Agency Survey paint a representative portrait of the situation facing community agencies on the threshold of a newly amalgamated City.

1.1 Who uses the services of these community agencies?

The Survey reveals that the needs of clients are increasing and more complex. Agencies note the growing number of people who are experiencing greater stress, are less able to meet their basic needs, and at the same time, have less access to support services. Respondent community agencies indicated that persons with physical, psychiatric and cognitive/developmental disabilities, new Canadians, visible and ethno-cultural minorities, and the aboriginal population use their services. The populations most commonly served are low-income clients, the unemployed, victims of abuse, and parents.

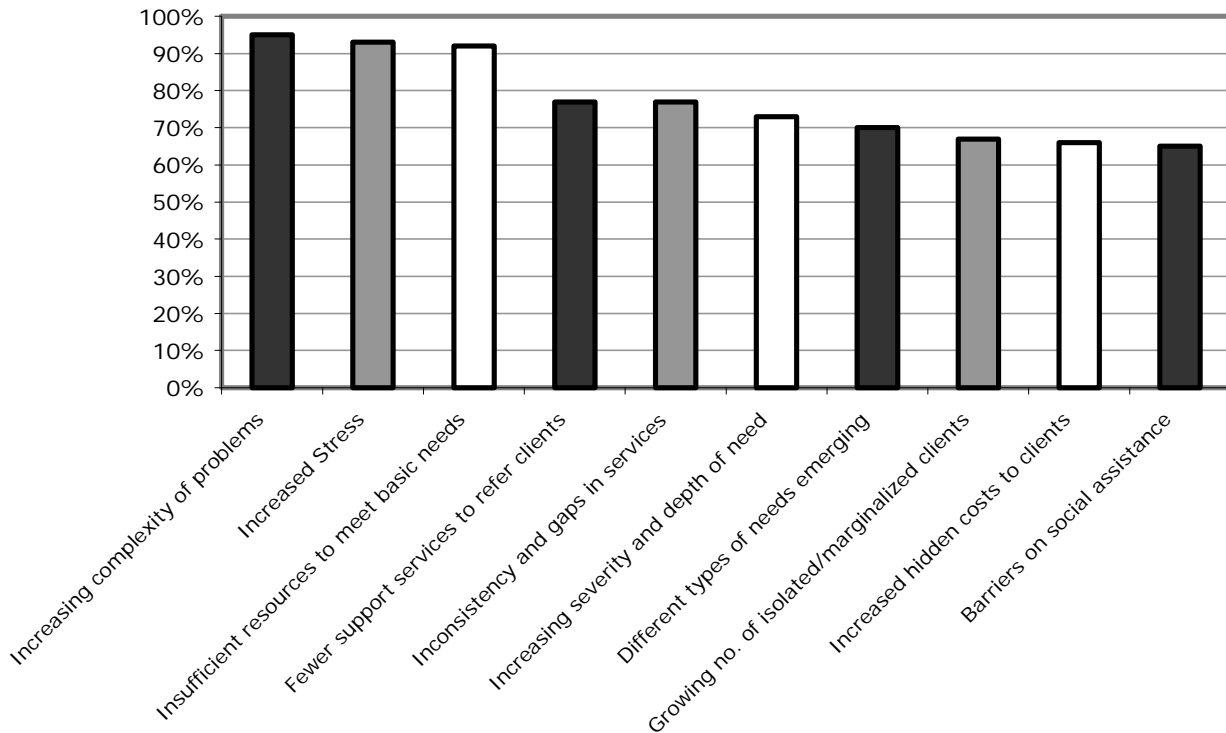


¹ The agencies were selected from the database of the Community Information Centre of Ottawa ("Blue Book").

1.2 What organizational changes are agencies experiencing?

The Survey also shows that, in the struggle to meet the increased and complex needs of clients, agencies are experiencing a rise in staff and volunteer stress and fatigue. Changes with respect to staffing were identified as significant issues. Responding agencies indicated that there are greater workload pressures and more demands on personnel. As well, agencies noted greater stress and uncertainty. Some agencies have implemented service reductions or changes in order to cope. The most commonly cited program changes identified were longer waiting lists, increased waiting time for services and merged or adapted services. Other notable changes listed by agencies included reduction in the hours of service, cancelled services and charging a fee-for-service. Survey responses demonstrate clearly that while community agencies are struggling with their own challenges, more and more it is their clients who are suffering as their needs go unmet.

Chart 2 - Challenges Faced by Clients



1.3 How are agencies responding to the changed environment?

Agencies are compelled to seek alternative resources. Most agencies have looked to partnerships as a way of addressing some of their challenges. They listed building alliances between community agencies, community health and resource centres, social service agencies, corporations, academic institutions and all levels of government. There is an increased reliance on volunteer support to meet current workloads. Many community agencies rely on volunteers to carry out their activities. Volunteers are not easily replaced and the need for qualified volunteers is great. Across Canada the

recruitment of qualified volunteers is considered to be a constant struggle by most organizations in the sector². Furthermore, community agencies recognize that they may be ill equipped to provide the training and motivation volunteers deserve and require to remain committed.

1.4 What supports do community agencies need?

Survey responses echo a broader trend in the non-profit sector in Canada. Even while client needs increase, much energy is being expended toward funding diversification, contract work, and funder reports. This is creating a more stressful climate in the non-profit sector of growing competition for decreasing government funds and for public recognition. The challenges that agencies identified point to three key areas where community agencies need support:

- increased funding
- assistance with human resource issues in relation to staff and volunteers
- support with respect to networking and policy issues leading to a reduction of program silos and barriers for clients as a response to the complexity of issues.

As well, responding agencies identified a need for research assistance to support and enhance their work. Agencies have recognized that analysis and sharing of agency based data and information with respect to their client populations are essential to inform their fundraising, reporting, strategic planning and evaluation.

1.5 Observations and Recommendations

Furthermore, **agencies identified the need for the Social Planning Council of Ottawa-Carleton to continue to foster co-operation and partnerships with multidisciplinary groups**, bringing together public, private and non-profit organizations on a wide variety of issues. The survey responses demonstrate that **the work of the Social Planning Council and other research bodies fulfils a significant need in the community**. Research and analysis support, such as that provided by the Social Planning Council, assists front line agencies to meet expectations of funders, to enhance service planning, and to aid in understanding and responding to their clients and communities.

Despite (or perhaps because of) a lack of financial and human resources, community agencies have found novel ways of meeting challenges. Their strategies are innovative ways to adapt to the new environment but are not substitutes for the real need identified for solid, long-term and adequate core resources to enable agencies to meet increased demands for service.

The voluntary sector³, including community agencies, is vital for the development of healthy communities and is important to Canadians in general. The sector mobilizes

² Canadian Centre for Philanthropy. 1997. Caring Canadians Involved Canadians. <http://www.statcan.ca/english/freepub/71-542-XIE/71-542-XIE00001.pdf>

³ The voluntary sector refers to those organizations and agencies that are neither under the auspices of government nor private business. It includes, but is not limited to, volunteer organizations. For example,

people, creates a sense of community, enhances democracy, fosters community participation and strengthens society.⁴ With Ottawa's fast-paced changing environment, increasing population⁵ and growing income gap⁶ the critical need for a strong voluntary sector is accentuated. **It is important that no additional strains be placed on an already fragile and overburdened sector, and that it receives increased support.**

Finally, **the new City government and the community agencies need to work together to reaffirm that Ottawa's voluntary sector "is a vital pillar in our society as are the public and private sectors".⁷** The capacity of the sector, and the community agencies within it, need to be enhanced so they can more effectively meet those needs in the community that are not the responsibility of government or business. Real capacity building within the sector means enhancing "the human and financial resources, technology, skills, knowledge and understanding required to permit organizations to do their work and fulfill what is expected of them by stakeholders"⁸. **Community agencies are at a crossroads and need to be assured that they can count on having stable resources and the capacity to prioritize their clients' needs as they make the transition to the current fast-paced, knowledge-based economic climate.**

The full presentation is available on our website (<http://spcottawa.on.ca/public.htm>)

most community agencies are part of the voluntary sector, whether or not they have paid staff. The non-profit sector, third sector, or the social economy are other terms used to describe this sector.

⁴ Industry Canada. Downloaded November 2000. Non-Profit Discussion Paper. Strategis Collection: Corporate Law Policy Directorate. <http://strategis.ic.gc.ca>

⁵ City of Ottawa. May 4, 2001. Population, Employment, Household and Dwelling Projections 1996 to 2031. Ottawa.

⁶ The Social Planning Council of Ottawa-Carleton. A Tale of Two Cities. Ottawa: SPCOC, 1999.

⁷ Canadian Council for International Co-Operation (CCIC). Downloaded November 2000. Characteristics of Voluntary Organizations. A Profile of Canadian NGOs.

⁸ Government of Canada 1999. Working Together. A Government of Canada Volunteer Sector Joint Initiative. Ottawa: Office of the Privy Council.

2.

Trends in Fundraising

Presentation by Louis de Melo

Vice President Resources Development, United Way/Centraide Ottawa

Fundraising is changing. Corporate expectations are becoming more complex: corporations want to know the impact of their charitable dollars. They are focusing more on sponsorship and less on giving. Fundraising strategies need to adjust to varying perspectives and business objectives.

2.1 Corporate Social Responsibility

Some experts are saying that Corporate Social Responsibility (CSR) has become a key business issue. CSR is the overall relationship of the corporation with all its stakeholders (customers, employees, community, owners/investors, government, suppliers and competition).

2.2 Community Investment

Community investment is expected to increase in the next five years, affecting the way businesses are run. Community investment strategies and activities can strengthen a corporation's relationships with stakeholders.

2.3 Advantages of Community Investment

Businesses can take advantage of a good relationship with the voluntary sector to achieve their objectives with respect to Corporate Social Responsibility.

- community involvement for their employees
- expertise in community issues
- community profile
- positioning as good corporate citizens
- national reach and impact
- conscience on health and social issues
- company linked with brand identity/loyalty to causes (e.g. The Body Shop/animal rights movement)

2.4 Challenges

Fundraisers must foster the connection between business objectives and philanthropic priorities. They must be able to assess their needs from an outside perspective and to manage three horizons simultaneously: protect and defend core business, build on emerging businesses and create viable future options

Conclusion

Fundraising is no longer about making straightforward requests for money. It is about knowing the corporations and meeting their demands for an efficient use of their funds to meet the corporations' objectives on a yearly basis. It is about establishing and maintaining good relationships among funders, fundraisers and service providers.

3.

Trends in Funding

**Presentation by Eileen Dooley,
Vice President, Community Services, United Way/Centraide Ottawa**

Distribution of funds is also changing at the United Way. Community Services is concerned to match philanthropic interests with community needs, not just in terms of money, but also in terms of other needs like human resources, information and assistance in funding diversification.

3.1 Issues of Change

Three issues are altering the way funds are distributed:

- **Funding**
Resources for core, ongoing funding are declining.
- **Sustainability**
Financial and program sustainability issues are more complex in the face of change.
- **Complexity**
Client needs are growing more complex and agencies must know the issues and be able to work collaboratively to address them.

3.2 Responding to Change: Funding Diversification

Funding diversification is a result of these changes. Agencies are responding to the following key trends:

- **Accountability**
Donors are looking for accountability.
- **Impacts**
What are they and how are they changing individual lives?
- **Outcome evaluation**
What is the long-term outcome? How can it be measured and articulated?
- **Duplication**
Donors want to build on community assets and avoid duplication.
- **Collaboration**
Donors are looking for evidence of collaboration among service agencies to avoid duplication.
- **Sustainability**
Donors are not making long-term commitments but looking for agency efforts in their own sustainability.
- **Community support**
How do we respond to the changing nature of Ottawa?

- **No core funding**
More and more funds are directed to individual programs, leaving a shortage for agency administration.
- **Decreasing government support**
The province wants the corporate sector to increase its involvement.
- **Increased demands**
Applications for funds far outstrip what are available.
- **Increased complexity**
Agencies must provide the information and solutions that donors require.

3.3 Challenges

There are many challenges that accompany these trends:

- need to respond to changing demographics
- need to increase community support
- identifying the needs of agencies for resources other than money (e.g. use of in-kind resources)
- need to articulate how agencies are changing lives
- meeting the increased complexity of client needs (e.g. changing nature of service delivery)
- need to examine assets and look at how to improve service

Conclusion

Funders want to be regarded as partners making a difference in our community. Rather than making simple charitable donations, increasingly they want to take part in deciding where funds will go and how they will be used. They are asking for the effects to be documented. The challenge is for this partnership to ensure that the needs of clients and agencies are equally met through improved service delivery.

4.

Trends in Networking And Partnership Building

Presentation by Allan Rix, Centre for Voluntary Sector Research & Development

4.1 Meeting Social Needs

A powerful trend that has emerged in the last few years is the emergence of governments and agencies as the formulators and deliverers of programs to serve the community and its members. We have become accustomed to having a program or agency to meet the majority of social needs. Without detailing a list, there is a range of agencies and groups that we take for granted, not only in the helping area but also in sport and recreation. The agencies have been forced over time to take the next step. With increased demands outweighing modest resources, the government has contracted them to provide services to citizens.

4.2 Redefining Our Role in A New Society

All of this comes at a time when there is a major change at play in the way that we as citizens are being governed. The impact of a new age of information techniques, globalization, and ease of money transfer has tested our governmental structures. As citizens, we now have many ways of interacting with our governments and of seeking services to meet our interests and needs. Governments are redefining and need to redesign themselves. At the same time as they have been pushing for a smaller role to play, the not-for-profit sector has been assuming a bigger role in our society and community. The two forces were destined to meet and they have. Charities now talk about civil society, and their role in it. Lower tier governments (i.e. municipal level) need a way to deliver services and meet the costs of doing this.

4.3 The Canadian Accord

The Voluntary Sector Initiative represents the next logical step in the growing together of service delivery and financing. This week we expect the publication of the draft of the Canadian Accord that, in the words of the President of the Treasury Board, will:

- Help to define our relationship
- Capture the principles which have underpinned many instances of successful co-operation, both past and present, and encourage their widespread adoption
- Build the capacity of the voluntary sector by increasing access to new technologies and exploring new approaches to funding
- Streamline the regulatory framework
- Increase public recognition of the contribution of the sector

When the Draft accord is published there will be a series of meetings across the country to discuss it. We should not miss the opportunity to participate. There is an opportunity here that needs to be seized by both government and agencies, and that is to develop a mechanism to influence policy directions and developments. **As part of the initiative there is a sum of \$28.5 million federal funding available in what is called the Sectoral Involvement in Departmental Policy Development.** It is designed to enable the voluntary sector to contribute to public policy development. Under this program, 15 federal departments will fund projects for a maximum of two years. We have a tendency to always think in terms of quick solutions and more money for programs. We need the input of researchers and academics, however, to help us undertake studies and reviews that will lead to the presentation of options and choices. Another area that will come forward from the initiative is a request to find ways to increase the human resource capacity of the sector. We should be prepared to suggest and develop new models of training and human resource development both in government and in the sector.

4.4 The Chamber of Charities

It is a time of great opportunity for us to work together in this sector and this city. The recent forum held by the Centre for Voluntary Sector Research and Development to explore the potential of a Chamber of Charities points to the enthusiasm there is in this community to work together. Over 130 people attended the forum. The Centre has followed up with a submission to the United Way for funds to continue to explore the concept of the Chamber and hopes to have further news available in the next few days and weeks. We want to move the concept forward without setting up another set of structures that will inevitably become a bureaucracy. We built on the experience of Calgary in planning the Chamber meeting and are delighted to report that we are now receiving indications from other cities across Canada that they too wish to build in this way. We are also planning to begin a series of early morning seminars that will enable us to talk to each other and learn from each other. By the autumn of this year we should have this Chamber very active on the local scene.

5. Changes in Society Affecting the Voluntary Sector

Presentation by David Welch, President, Social Planning Council of Ottawa

5.1 Our Changing City

Ottawa is presently going through many of the social and economic transformations that are also occurring in far larger cities. Quite quickly, Ottawa has gone from a city that was centred mainly on its role as the capital of Canada, to one where the economy is much more in tune with what is often referred to as the new economy. This new economy is now fundamentally transforming Ottawa's economic and social make-up. This in turn is making the city far more connected to the private sector and thus far more vulnerable to rapid short-term global change than in the past.

Ottawa is a prosperous city with a strong tax base. Up until now, local officials have been responsive to many of the demands of the social service sector, and fewer services have been cut than in other cities where the economic base is both less diversified and less stable. However, without some form of a national social safety net, and greater support from the Province to moderate the impact of economic downturn, Ottawa could find itself anywhere along a spectrum wherein some cities get richer, others stay the same, while still others go into rapid decline: a situation we have seen in more acute form in the United States.

5.2 The Role of The Voluntary Sector

Local non-profit organizations have important socio-political effects for they bring impoverished groups such as women and the unemployed into the public view.⁹ The importance of people participating in the "social construction of their daily lives"¹⁰ needs to become accepted to ensure that the benefits of national growth are channelled to the local level for the benefit of everyone.

In its more democratic forms, the voluntary sector as part of civil society helps to create the social trust (often referred to as social capital) that "allows people to work together effectively - that will allow the new economy to grow organically".¹¹ Volunteers within the voluntary sector remain essential to the proper functioning of the organizations of the third sector. It is estimated that about 225,750 people (35 % of those over 15) work as

⁹ Quirós, T. and Palma, D. (1997). Chili. In Hubert C. (ed.). *Community Development Around the World: Practice, Theory, Research, Training*. Toronto: University of Toronto Press, p. 409.

¹⁰ Quirós, T. and Palma, D. (1997). Chili. In Hubert C. (ed.). *Community Development Around the World: Practice, Theory, Research, Training*. Toronto: University of Toronto Press, p. 396.

¹¹ Roberts, W. and Brandum, S. (1995). *Get A Life*. Toronto: Get A Life Publishing, p. 249.

volunteers presently in Ottawa. Volunteers contribute 145 hours each or 33.3 million hours altogether. The economic value is estimated to be worth about \$541 million.¹²

5.3 The Role of the State

Even with the scope and importance of the voluntary sector, the state continues to have the central role in society, to assure basic public rights such as education, health, transportation and communications as well as the protection of the most vulnerable.¹³ Governments at various levels must strive to continue to reorganize their own institutions so that they can carry out the tasks that are essential to the society as a whole, to make them more responsive to citizens' needs and to assure that state activities become more transparent and effective.¹⁴ They must interact with the institutions of civil society, mediating between conflicting social and class interests in order to reach what many might consider to be the common good for the majority, all the while assuring respect for the less powerful, especially when they are in a minority.

5.4 Creating New Alliances

The acceptance of the organizations of the voluntary sector as part of the democratic process and not just "special interest groups" should over time lead to greater trust between citizens and in turn to a reinforcement of local democracy. Strong local democracy, consisting of real citizen participation, is essential to the building and reinforcing of democracy at other levels. Democracy becomes in essence an interaction of elected and non-elected officials at different levels of the state with the various actors and organizations of civil society assuring direct participation.

In today's world of increased globalization, the local has an increasingly vital role to play. It is in the interaction of the state and its various components with the organizations of civil society, including the various social movements, that new forms of democracy are born. People have realized that the third sector is not a replacement for the state but a mechanism to influence the form of the state and the market. In the end, it will be creating new alliances, for greater racial and gender equality, in the struggle against poverty, and in concern with the environment as the centrepiece that permits the long-term sustainability of communities such as Ottawa.

¹² Voluntary Sector Transition Project Team, 2000.

¹³ Langdon, S. (1999). *Global Poverty: Democracy & North-South Change*. Toronto: Garamond Press.

¹⁴ Quirós, T. and Palma, D. (1997). Chili. In Hubert C. (ed.). *Community Development Around the World: Practice, Theory, Research, Training*. Toronto: University of Toronto Press.

6.

Question and Answer Summary

1. About Corporate Giving

The emerging trend to reduce core funding is threatening community agencies. Core funding ensures the sustainability of the voluntary sector. Therefore corporations and funders need to realize that in its absence, community agencies will not have sufficient resources to deliver various programs.

- Corporations need to maintain a balance between social responsibility and corporate goals.
- Corporations need to be educated. Their support of certain government policies has a negative impact on our communities.
- Corporations need to have a marked interest in the well-being of our communities.

2. Meeting Community Needs

- There needs to be greater accountability for public funds. The government has the role of ensuring that community needs are met. It should provide funds for the social services sector and educate society.
- Central agencies who represent this sector must communicate the political interests of the communities served by the agencies.
- The voluntary sector needs to work collaboratively to overcome systemic problems.
- The voluntary sector must educate members of the public to influence public policy.

3. Ethics and Private Partnerships

- There needs to be a forum or committee that would look at the ethical principles of partnerships between the private sector and the voluntary sector.

7. Results of the Consultative Workshops

7.1 Strengthening our Fundraising Capacity

Facilitator: Lucie Goulet, Regional Program Manager, Trillium Foundation

1. What are the fundraising barriers keeping your organization from fulfilling its mandate?

a. Hard to recruit and motivate volunteers

- Shortage of skilled /experienced fundraisers
- Hard to find fundraisers who can motivate volunteers on an on-going basis
- Service delivery volunteers are asked to do fundraising but they are busy, sometimes intimidated, and may have limited knowledge on the subject
- It is always hard to find volunteers who are motivated and excited about fundraising

b. Difficult to ensure a successful fundraising campaign

- Lack of empathy for particular people/issues
- Donor fatigue
- It is hard to come up with unique ideas that appeal to the masses
- Organizations fear they will not recoup costs if they spend money to organize fundraising campaigns
- Lack of branding
- Sometimes traditional funders reduce their contribution if the organization has been successful in it's fundraising, thereby leading to no net benefit to the clients.

c. Fundraising must now be integrated with the organization's activities

- Fundraising has to be part of the organization's strategic planning
- Organizations can't rely solely on volunteers to work on fundraising
- Engagement of staff is critical to a successful fundraising campaign



Comment:

- If organizations have the money, it can be good value to hire a professional fundraiser.
 - Funders are demanding something new and innovative in programs when organizations are trying to maintain existing quality programs.
 - There is a fear of fundraising.
-

2. What are the fundraising strategies that proved to be successful for your organization?

a. Know your target donor

- Know your community of interest
- Collect information to determine potential donors
- Canvas your volunteer base for ideas, connections and contacts

b. Develop a fundraising strategy

- Have a fundraising theme
- Appeal to emotion
- Link your organization to a Celebrity or a Champion
- Use beneficiaries to appeal directly to potential donors
- When you fundraise, a large percentage of your target should come from a few donors and a small percentage from a larger pool of donors
- Timing is very important: when there is an event or an opportunity identified in a community, use it efficiently
- Use community events to be seen, upon approval of event organizers
- Participate in many community events (e.g. BBQ)
- Be media savvy
- Do the same event annually and develop a tradition (e.g. physical activity works)
- Recognize when an event stops being successful

c. Develop a strong network

- Join organizations to meet people you wouldn't ordinarily meet
- Retain membership in associations



WHAT COULD IMPROVE YOUR ORGANIZATION'S FUNDRAISING CAPACITY?

- A policy/legislative change to have donations to social services generate the same rate of income tax deduction as donations to political parties.
 - Policy/legislative changes so non-profit organizations can issue a tax receipt to people who contributed labour or services to their organization.
 - Funders should stop providing services or recreating structures that already exist in the community. They should identify the agencies that offer these services and fund them to provide those services.
 - Develop a Toolkit for fundraising (e.g. PR, expertise, graphic design, training)
 - Develop a Network responsible for the development of the fundraising capacity of the Voluntary Sector.
 - Develop access to a database of public funders and private foundations
 - Have better information on which funders fund what
 - Organize a trade-show for agencies, corporations, funders, causes
 - Make guidelines available
 - Provide clear information on how to prepare funding applications.
-

4. What would be the next step for the development of a fundraising strategy?

a. Developing a Funders' Forum where voluntary sector agencies and funders sit at the same table and meet on a regular basis.

b. Creation of a clearinghouse of information on funding

- With free access
- With 1 point of entry, including community resource body with expertise and toolkit
- Information on fundraising such as processing information, identifying funders and undertaking evaluations



Recommendations to the City of Ottawa :

- The City should assume the role of the clearinghouse/resource.
 - Provide support (e.g. seed funding/space etc.) and a voice for the sector (e.g. Chamber of Voluntary Organizations)
-

7.2 Strengthening our Volunteer Involvement Capacity

**Facilitator: Nathalie Charette,
Manager of Educational Programs & Services, Volunteer Ottawa**

1. What challenges are our organizations facing to strengthen Volunteer Involvement?

a. Volunteer recruitment

- It is very hard to recruit volunteers and specifically, volunteers who have the right skills
- Some organizations recognize only potential Board members, people with policy and research skills
- For some organizations volunteer recruitment is easy, the challenge lies in finding leaders
- It is difficult to find volunteers from culturally diverse communities

b. Integrating volunteers

- Paid staff are often reluctant to work with volunteers
- There is often a high volunteer turnover
- It is always a challenge to keep volunteers feeling needed and useful
- There are no job descriptions for our volunteers
- Agencies are not always clear on the skills needed to do a specific job
- Volunteers do not always possess skills or have the time needed by organizations
- We need to provide volunteers with job description/guidelines
- We need to meet volunteer needs in terms of growth and satisfaction: recognizing and developing volunteer potential

c. Coordinating volunteers

- Lack of structure and continuity for volunteers
- Agencies are not set up to use evening and weekend volunteers
- We need well-managed volunteer programs yet very few agencies can afford a Volunteer Coordinator

d. Rewarding volunteers

- We lack the money to compensate volunteers for their expenses
- Lack of “ownership” that would keep volunteers
- There is a need for some sort of monetary recognition
- There is a frustration in some volunteers in knowing their own value and seeing others paid for doing the same job

e. Changing demographics of volunteers

- Volunteer population is aging and younger parents have limited time
- Replacing aging volunteers will be the challenge of the future
- We need to educate the broader public on the voluntary sector

2. What Volunteer development strategies proved successful for your organization?

a. Adapting your organization to the availability of volunteers

- Attracting volunteer leaders by developing mechanism that enables them to share the work load with others (e.g. having co-chairs on a committee)
- Limiting time commitment of volunteers (short-term projects)
- Working without hierarchy where staff are not in a positions of authority over volunteers

b. Volunteer training programs

- Training programs designed specially for young people
- Developing mechanisms to give regular feedback to volunteers
- Provide volunteers with guidance and leadership in their placement
- Running in-house workshops to identify talents and encourage co-operation among staff and volunteers

c. Rewarding volunteers

- Offering volunteers compensation in-kind such as access to facilities and assistance in producing resumes, cover letters

d. Developing partnerships

- Partnership with local high school: **school + staff + volunteer** co-operation
- Co-operation among groups who use volunteers to develop common strategies for volunteer development



Comments:

- Ontario Works Regulations and legislated “volunteers” have had negative impact
 - Many grass roots organizations don’t agree with mandated volunteerism--term “volunteerism” has been co-opted by province
-

3. What would improve your organization's capacity for Volunteer Development?

In order to strengthen volunteer capacity, we believe we need to:

- Improve the overall image of the “volunteer”.
- Develop communication mechanisms using such tools as a central registry of organizations, newsletters, etc...
- Increase access to funding and promote “internal” allocations to funds for volunteer programs.
- Offer tax credits to people who volunteer, organizations who involve volunteers and corporations who support volunteerism.

4. Recommendations for the development of a Volunteer development strategy

We recommend that the City of Ottawa take a leadership role in promoting the image of volunteers, in collaboration with other leaders like Volunteer Ottawa, by:

- a.** Embracing the societal value of volunteers
- b.** Offering funding for volunteer development
- c.** Offering in-kind service such as network development (registry, newsletter etc.), free training and places and locations for offices and meeting rooms

.

7.3 Strengthening our capacity for evaluation

**Facilitator: Dr. Tim Aubry,
Centre for Research on Community Services, University of Ottawa**

1. Introduction

Evaluation Support in Ottawa

Both the University of Ottawa and Carleton University are responding to community need for research and support in agency evaluations.

The Centre for Research on Community Services (CRCS) at the University of Ottawa provides services that include:

- program evaluation of service processes, outcomes, and costs
- survey design and analysis
- workshops on a variety of topics related to community services research and evaluation

The central theme of the research unit is social integration, especially as a community response to de-institutionalization (mental health, people with disabilities, etc.).

Students in the School of Social Work at Carleton University gain credit through placements in community organizations. Many students have been asked to come up with indicators and assist with agency evaluations. Evaluation is critical for community groups to enhance their organizations or to ensure ongoing financial support. The Community-based Research Network (CBRN) is guiding students and agencies to meet very high standards.

The American Experience

In the U.S., non-profit organizations (NPOs) have been forced to document outcomes and benefits. Initially, with limited time and resources, they did not recognize the advantages of doing so. The United Way of America worked with NPOs across the country to assist them with evaluation and to implement outcomes based processes among their donor recipient agencies.

This process was very educational:

- It enabled agencies to better communicate the benefits they were bringing to the community, to themselves and to their funders.
- In some cases the full range of benefits was not captured or the outcome measured was too narrow, i.e. literacy measures for schools do not capture the full range of activities in these institutions.
- In other cases report cards on public institutions began to emerge and changed the way organizations viewed themselves and conducted their work.
- When evaluation data are collected, analyzed, reported and used appropriately, they provide organizations with the information and knowledge they need to change and make improvements to the programs and services they provide, which in turn benefits clients in a systematic way.

NPOs greatly benefited from the support and resources made available to evaluation and outcome processes. For information from the United Way of America, visit <http://national.unitedway.org/outcomes/publctns.htm#R>.

2. What are the evaluation challenges faced by your organizations?

a. Integration of evaluation

- We need funding dedicated to the evaluation process: in the U.S. 5% of a project is dedicated to program evaluation; in Canada it is less than 1%, if at all
- Evaluation is not structurally embedded into organizations - all levels, including clients, need to be part of the process

b. Evaluation expertise

- We need evaluation models that are useable and appropriate for each agency
- We need access to skills, training to facilitate the process of evaluation in organizations

c. Using the results

- Results can affect funding sources
- Agencies need to learn how to interpret and use results to get funding and improve services

d. Defining outcomes

- Current government policies are negatively affecting community agency outcomes & evaluation, especially with the erosion of social programs.
- Can evaluations be used for advocacy?

3. What are the evaluation strategies that proved to be a success in your organization?

a. Good feedback

- Evaluation can help staff & volunteers understand that their work has a positive impact
- Clients have an opportunity to influence change & improvement strategies for other users in the organizations that serve them

b. Integrating evaluation into policy processes

- Evaluation as a part of the entire policy development process enables board members to measure the effects of the policies they implement and staff to compile the necessary evaluation data as part of their job descriptions
- A funding agency representative stated that they get better proposals because of the implementation of evaluation processes embedded in Requests for Proposals (RFPs)

c. Forming partnerships to develop evaluation methods

- University students have helped develop the foundation for evaluation processes as part of their course work
- d. Outcomes training**
- The Old Region of Ottawa provided excellent workshops to community groups on how to do evaluation and to develop a Logic Model. The tools from those workshops were considered to be excellent.

4. What can your organization do to improve its evaluation capacity?

- a.** Money - e.g. funding for designated evaluation positions; to have a percentage of budgets allocated to evaluation while ensuring that there is no decrease in services to clients
- b.** Access to information related resources – e.g. Other evaluation models, examples of evaluation instruments, training, consultation with other implementing agencies, knowledgeable volunteers & university students, “Community Toolbox” for Ottawa (<http://ctb.lsi.ukans.edu/>), statistical software
- c.** Peer review – a process to enable agencies who have produced evaluation instruments & tools to have their work reviewed by others prior to implementation
- d.** Time & Training – time allocated in agency & individual work plans for evaluation, evaluation training for staff and the creation of an organizational culture for evaluation



Comment:

Funders could assist with evaluation by:

- engaging volunteers in the process
 - promoting the Community Tool Box clearinghouse as one example for Ottawa
 - making available more examples of tools
 - facilitating access to the Canadian Centre for Philanthropy information on the subject.
-

5. What recommendations would you make to the City of Ottawa with respect to evaluation?

a. We recommend that the new City assist community organizations by enabling them to make evaluation an integral part of their organizations by:

- providing resources for this purpose
- providing leadership to enable these organizations to work collaboratively through the creation of community round tables on evaluation (i.e. space, newsletters, Internet resources, etc.)

7.4 Strengthening our capacity for advocacy

**Facilitator: Catherine Reid,
Project Officer, Community Economic Development Technical Assistance Program
(CEDTAP)**

1. What are the main obstacles you face in your advocacy activities?

a. The advocacy risks

- Community agencies need to unite to conduct advocacy more actively. However, the workshop participants noted that advocacy is an activity that can be detrimental to agencies in our sector. For example, several community agencies found their funding cut on the heels of advocacy activities deemed too aggressive by funders.

b. Lack of capacity

- Our sector is not equipped to conduct effective advocacy activities.
- One of the problems identified by the group was that community agencies are increasingly putting energy into the offer of services, without taking proper stock of the implications for clients.
- Another obstacle to advocacy is the lack of integration among the marginalized groups in the community sector. For example, the members of multicultural communities have difficult access to advocacy activities put on by mainstream groups.

c. Lack of public support

- Macro-level decisions made by the government directly influence the people living in poverty who use the services.
- Mention is made of the need for public awareness. According to the workshop participants, the public does not currently support advocacy activities from the community sector.

2. What advocacy strategies work for your agencies?

a. People first: an effective advocacy model

- We must support marginalized individuals, such that they are able to conduct their own advocacy activities. The example of the working group on poverty is a perfect example of how individuals living in poverty, in partnership with stakeholders and city staff were able to develop an effective advocacy group that was able to make its voice heard among elected municipal representatives.

Some of the elements that made this group effective include:

- The individuals living in poverty were an integral part of the advocacy process and held decision-making positions.
- A solid network of stakeholders emerged to support the group.
- The group gained support from key decision-makers at the municipal level as well as in the community agencies.

- The individuals living in poverty were given support enabling them to participate in the group (travel costs, child care, meals).

A FEW WINNING STRATEGIES:

a. Sell yourself

- Have spokespersons, either individuals who experience the problem firsthand, or individuals keenly interested in the problem.
- Send letters or make presentations to resource people who can support our initiatives.
- Ensure that the needs of clients are clearly described.

b. Create alliances

- Develop a broader advocacy network despite the conservatism holding sway among the agencies.
- Educate the public and increase its awareness through networking and keeping the advocacy activities transparent.

c. Develop a knowledge base

- It's by knowing the system that one can participate actively in the community and advocacy activities.
- It's by knowing the legal and constitutional framework that we can ensure that the policies do not infringe our rights.

3. What can improve your capacity for effective advocacy on behalf of your clients?

What can improve the capacity of volunteers to be advocates among governments and funders?

a. Earn your credibility

- Use examples of individuals who have gone through the system so as to shed light on the impact policies have on the lives of citizens.
- Develop a knowledge base

b. Have the support of allies

- Set up a network of agencies so as to add weight to advocacy activities.
- Connect with lobbyists so as to make our voice heard more clearly.

c. Accept pluralism

- Extend a hand to multicultural communities.
- Improve the quality of interpretation services.
- Encourage communication with and the participation of marginalized individuals.
- Develop strategies to integrate excluded groups.

4. In your view, what would be the first step for developing an advocacy strategy in Ottawa, and who could provide the leadership in the community?

- Set up a network with a mandate to develop a strategy that takes excluded groups into account, in a spirit of pluralism (for example, cultural communities and low-income individuals: “People first”)



Recommendations for City of Ottawa staff:

- The city should support the networks that engage in advocacy activities.
 - The city should support the participation of cultural communities in these advocacy activities.
-

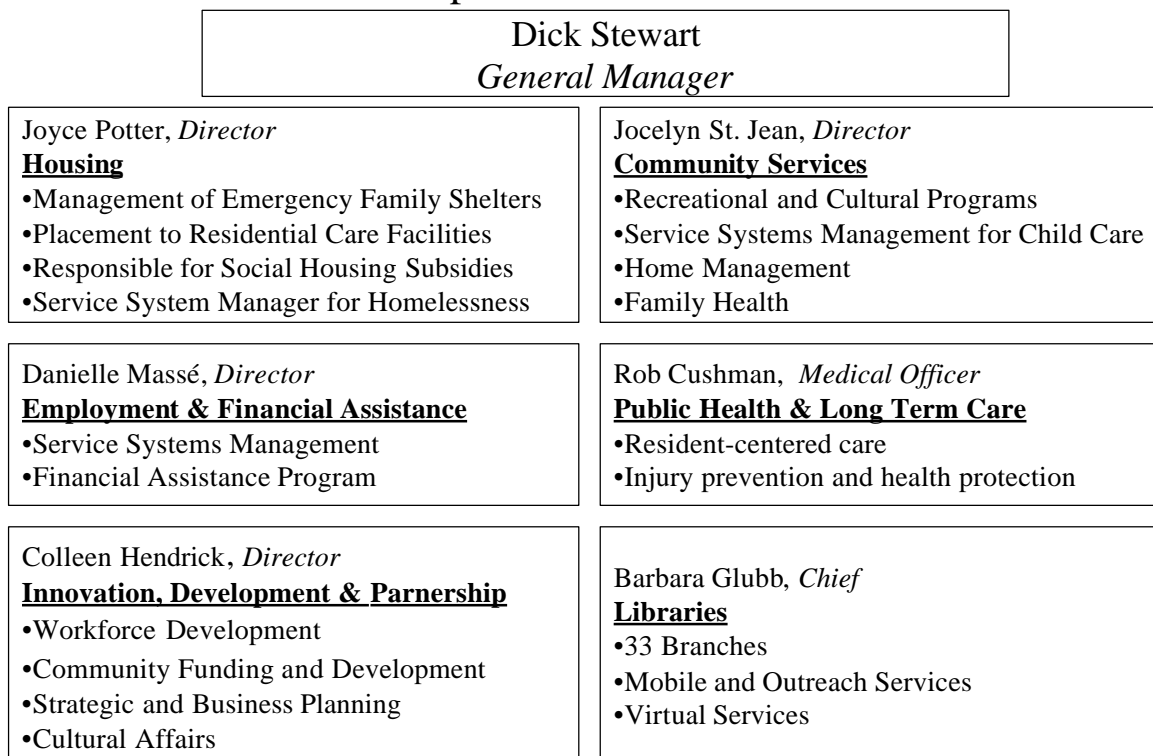
8. Panel Presentations: Voluntary Sector Services in the City of Ottawa

The new City of Ottawa has six departments: Protective & Emergency Services, People Services, Transportation, Utilities & Public Works, Development Services, Human Resources Services and Corporate Services. The City is committed to supporting the growth of the voluntary sector: volunteerism is included in the portfolios of all senior managers.

Two departments are of particular interest to the voluntary sector:

The People Services Department is unique among municipal governments in the grouping of services offered through the six branches. (See Chart 3 below) People Services fosters a healthy community that promotes and supports quality of life, so citizens can fully participate in and contribute to the life of their community.

Chart 3
People Services Department
Departmental Structure

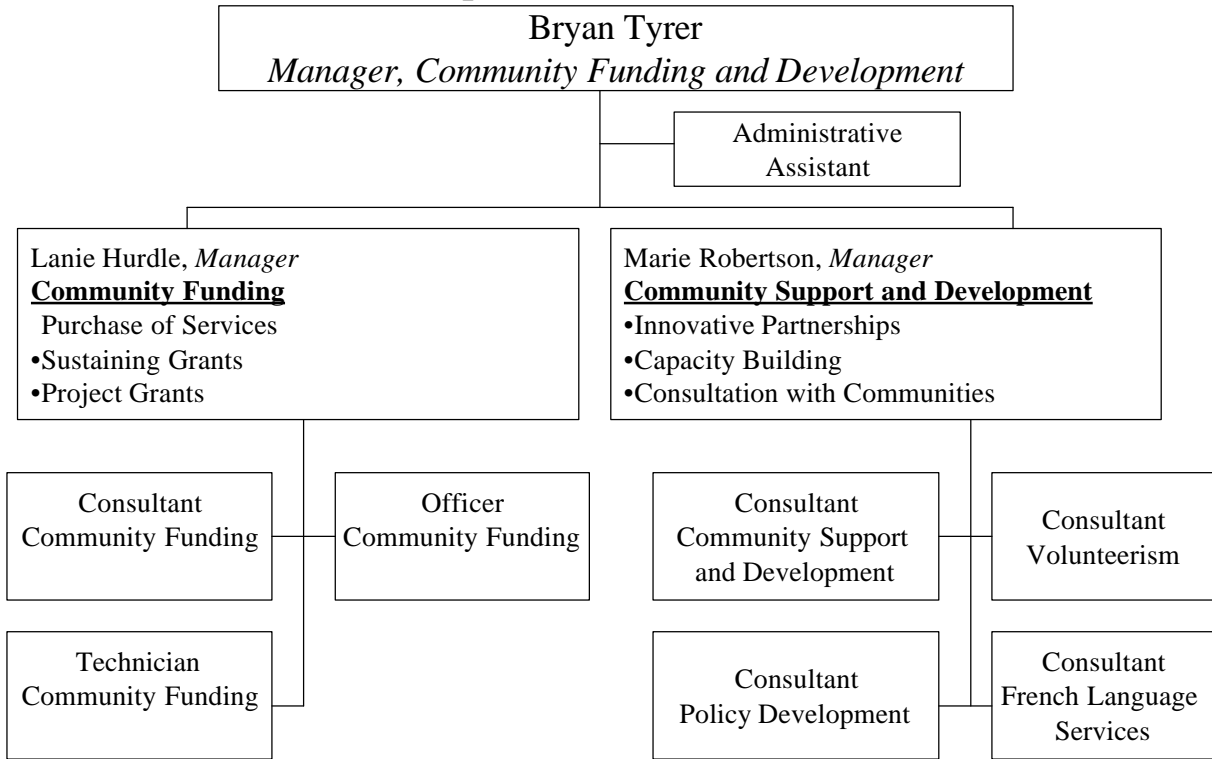


Corporate Services provides services such as financial and technical support to other departments. The Corporate Volunteer Secretariat is housed within this department.

**8.1 City of Ottawa Presentation by Brian Tyrer,
Manager, Community Funding & Development**

The Community Funding and Development Division is part of the Innovation, Development and Partnership Branch of People Services. It manages community funding and champions community development as an effective means to build community capacity and empower citizens. Its structure and activities are described in Chart 4.

Chart 4
Community Funding and Development Division
Departmental Structure



Principles

- The primary focus of Community Funding and Development will be the building of community capacity through effective, innovative partnerships and collaborative initiatives.
- Priority for funding and support will be directed toward services and programs that respect both the communities they serve and the uniqueness of those communities, that support integration and co-operation, and that support the valued involvement of the communities.

- Community Funding and Development will optimize resources, financial and human, to ensure maximum value for the dollar. Volunteerism will be its cornerstone. The processes involved will be clear, streamlined, simplified, facilitative and accessible.

Values

- Integration of economic and social infrastructure
- Cost-effective community solutions
- Investing in people
- Equitable access
- Sustainability
- Social justice

Short-term Goals

- Allocation of funding for 2001
- Amalgamated funding framework for 2002 and beyond
- Community consultation and development framework
- Consultation with all community partners
- Development of amalgamated partnership agreements
- Protocols and policies for volunteerism and French language services

Long-term Goals

- Improved access to funding and support through one-stop shopping
- Improved transparency and accountability
- Improved identification and addressing of community needs
- Increased community capacity
- Enhanced French language services
- Enhanced role of volunteers
- Demonstrated quality of service to our internal partners

Conclusion

The government of the City of Ottawa is still in transition following amalgamation. The Community Funding and Development Division will be consulting over the coming months with citizens, community organizations and funding partners to establish a funding framework. Through consultation at all levels it hopes to break down program silos, increase lateral movement of resources among sectors and facilitate cross-pollination of ideas.

8.2 Presentation by Barb Tiffin, Manager, Corporate Volunteer Secretariat

The Corporate Volunteer Secretariat, part of Corporate Services in the City of Ottawa, is in the very early stages of development. Its creation is an indication of the value the new City is placing on volunteerism.

Role

The Secretariat offers resources and support services at three levels of municipal government:

- **The Political Level**
through the Voluntary Sector Advisory Committee that reports to the appropriate Committees of Council

- **The Senior Management Level**
through the Senior Management Team

- **The Departmental Level**
through each of the six General Managers
re: programs and services delivered within their departments.

Vision

The City of Ottawa has a strong, healthy, diverse, and productive voluntary sector that provides opportunities for the meaningful involvement of all citizens. The involvement, empowerment, and celebration of volunteers ensure that the City of Ottawa is a caring community.

Mission

The City of Ottawa strengthens and supports the voluntary sector's contribution to the quality of life its citizens enjoy, due to the social benefits and economic value the sector provides.

The City collaborates to:

- Provide one-window access to all City resources that support and strengthen the sector
- Identify and respond to community needs
- Encourage active volunteer participation
- Ensure funding and other resources are available
- Create networks which make it easier and desirable for the three sectors to contribute and be involved
- Recognize and celebrate achievements

Values

- **Mutual respect**
Treating all groups and individuals with dignity and maintaining a sensitive and caring attitude
- **Inclusiveness**
The City will operate a pro-active outreach approach. Involvement in the voluntary sector will be accessible
- **Sustainability**
Collaboration, accountability, and leadership development required to sustain the voluntary sector
- **Innovative, responsive, transparent, credible, authentic, excellent, proud**

Main Client Group

- **Corporation of the City of Ottawa.**
Staff managing and supporting volunteers who are involved in municipal service delivery.
- **Voluntary groups with relationships with the City of Ottawa.**
This includes grant recipients, purchase of service agreements, partners in service delivery, groups who use municipal facilities, groups who receive in-kind support
- **Voluntary sector at large**

Strategic Goals

- Establish the City of Ottawa as a flagship community for the voluntary sector
- Achieve highest rate of volunteerism in Canada
- Demonstrate benefits of tri-sector approaches: to achieve balanced growth and social equity
- Link high tech sector and city to create technological listening posts
- Increase networking to: improve resources: cohesiveness and collaboration
- Overcome barriers that inhibit volunteering

Conclusion

The challenge of the Corporate Volunteer Secretariat is to make sure the volunteer sector is forefront in leaders' minds and that opportunities are enriching and significant. Policies and procedures that strengthen volunteer involvement and establish links with the voluntary sector need to be defined.

The Secretariat is not yet fully staffed. Inquiries and comments may be directed to:
Barb Tiffin
Phone: 580-2424, ext: 28996
E-mail: barb.tiffin@city.ottawa.on.ca

8.3 Dialogue Session

Several themes emerged during the discussion period following the afternoon Panel Presentation.

Social Justice

Questions and comments were addressed to the City panelists on issues of social justice. The need for poor children to have access to quality recreation programs, the needs of new immigrants and other marginalized groups, and the immediate needs of people who have been injured or suffered other emergencies were all addressed.

Because a framework for funding decisions has not yet been established, City representatives were unable to make specific promises of dollar support. They confirmed that social justice is a value of People Services and that they will strive to provide services in support of diversity in the community. They pointed out that it is very difficult to define a hierarchy of needs, and that when funds are distributed it will be based on a balanced review of requests.

Volunteerism

Questioning elicited the information that the City defines volunteerism as including organizations staffed 100% by volunteers, those staffed by both paid and volunteer workers, and corporations that provide volunteer hours through their staff. The term “mandatory volunteerism” is being used to refer to provincial volunteers like those in the Ontario Works program.

It was suggested from the floor that it is important to remember that voluntary means “freely given” and that different terminology should be used for situations where this meaning does not apply.

It was further suggested that volunteerism has become discredited partly due to abuse of the term. The provincial government says that volunteerism can compensate for cuts in social programs and government services. The Region, now the City of Ottawa, has played a positive role with the non-profit sector. We need to find a way to unite and work together to pressure the province to go back to the roots of volunteerism. We must continue to collaborate with the new City of Ottawa. The City, however, cannot fill all the gaps created by the province.

Advocacy

The City is not currently providing funding for advocacy groups although various municipalities have done so in the past. Again, with the funding framework still to be decided, City representatives could not promise that advocacy funding will be forthcoming in the foreseeable future. Dialogue did establish that People Services will be outcome-driven and that outcomes will be assessed broadly, taking into account long-term effects and collateral results.

Politics

Echoing concerns from the morning session, the issue was raised of whose role it is to address the negative impact of the provincial government's policies on the voluntary sector and the community as a whole.

The answer was , that while City officials can make representations to the Province in the context of City needs, the mandate of People Services is to work with service agencies to try and find other solutions.

Conclusion of Dialogue Session

The afternoon discussion was very positive. Community representatives present at the Annual Consultation are looking forward to working with the new City staff towards fulfillment of their goals.

9.

Conclusion

The Annual Consultation 2001, “Advancing the Community by Strengthening the Voluntary Sector”, was an unqualified success. Participants from a variety of groups representing health, social, and government attended the event. They shared one common interest; issues that profoundly affect the present and future of the voluntary sector.

Funding was a major issue of discussion for it has changed significantly. Funders are seeking new types of accountability and evidence of measurable success from fundraisers and service agencies. Corporate donors want their names linked with projects and events that are recognized and regarded as valuable by their investors and their customers. The main concern is the move by funders away from sustained and predictable core funding, requiring organizations to diversify funding sources. This is impacting the sustainability of organizations.

These trends have important implications for service providers. At the same time as service providers work to meet the increasingly complex needs of their clients, they must learn to make competitive applications for funds, meet the growing reporting requirements for short-term project funds, and develop other sources of funds that pay the rent and help keep agencies viable.

The development of strong networks was identified as a key strategy to increase organization capacity. Collaboration among the government, business and voluntary sectors is becoming more crucial as financial and human resources in all three sectors are stretched. The federal government has established the Voluntary Sector Initiative. Its recently published draft Canadian Accord articulates a new relationship between the voluntary sector and government. Associated funds will enable the voluntary sector to contribute to public policy development. Furthermore, Ottawa’s Centre for Voluntary Sector Research and Development is promoting local networking among agencies with the formation of the Chamber of Voluntary Organizations. This is a terrific opportunity for the voluntary sector to work in association with the City.

The participants reiterated the need for the Government to commit to the needs of the community and to the non-profit sector. No matter how important the voluntary sector becomes, it must not be expected to be a replacement for governments. Its role includes influencing government structures and policies, and maintaining social justice. It is governments that must continue to guarantee basic rights such as education and health services and to ensure that minorities and those most vulnerable are protected.

Trends in fundraising, funding diversification, networking and partnership building described by the keynote speakers have intensified the challenges to building capacity in the non-profit sector. The four workshops dealt with four challenges: *fundraising, volunteer involvement, evaluation and advocacy*. Participants worked through discussions of problems, successful strategies, and resources needed to reach solutions, and ended with recommended action on the part of the new City of Ottawa.

The community identified common needs such as:

- the need for a variety of partnerships and networks;
- centralized and readily accessible information;
- training;
- recognition and integration of these challenges into the daily operation of service agencies;
- as well as funds to be assigned specifically for these purposes.

These themes are consistent with the needs identified in the Social Planning Council's report Community Agencies At A Crossroads Summary of the Results of the Community Agency Survey. It is essential that the identified needs be met.

The City of Ottawa has made a public commitment to development of the voluntary sector with the creation of the Corporate Volunteer Secretariat. The Dialogue Session confirmed this commitment. Voluntary sector and City values are in accord. Continuing collaboration will strengthen the good that the City and the voluntary sector can bring to people's lives.

The workshop recommendations were presented to the City of Ottawa during the Dialogue Session that followed presentations by two City managers. **The recommendations suggest a clear partnership role for the City as a coordinator of information and communications networks and as a source of both funds and other resources such as meeting space and training courses.**



Recommendations to the City of Ottawa :

The City should:

- Assume the role of the clearinghouse/resource
 - Provide support (e.g. seed funding/space etc.) and a voice for the sector (e.g. Chamber of Voluntary Organizations)
 - Take a leadership role in promoting the image of volunteers
 - Assist community organizations by enabling them to make evaluation an integral part of their organizations
 - Providing leadership to enable these organizations to work collaboratively through the creation of community round tables on evaluation (i.e. space, newsletters, Internet resources, etc.)
 - Support the networks that engage in advocacy activities
 - Support the participation of multicultural communities in those advocacy initiatives
-

APPENDIX

Annual Consultation Evaluation:

There were over 130 participants at the Social Planning Council's 2001 Annual Consultation. 47 provided evaluation feedback via a form distributed in everyone's information package upon registration. Respondents came from a variety of organizations mostly from the Voluntary Sector in areas of health, advocacy, resource centres and others from government. The positions held by respondents were volunteer board members, coordinators, directors, presidents, community developers, coordinators and volunteers. Overall, the Consultation was considered to be very good to excellent.

Most of the respondents found the introduction and key note speeches to be informative or very informative. Most stated that they learned something new from the speeches. Several indicated in their comments that the direction for fundraising being promoted by some was too corporate. Others noted that there was a lack of focus on government responsibilities toward the sector.

The workshops were well attended and participation was excellent. Overall, the workshops were evaluated as having been useful to very useful. Most participants indicated that they could implement the workshop recommendations within their organizations and only one participant per workshop said they could not. The overall comment on the workshops was that they were too short. Other comments were a request for a fundraising tool kit, that the volunteer capacity workshop provided an excellent opportunity to network, and that the evaluation workshop referred to numerous models but that it would have been useful to further explore the differences between outcomes, impacts and process.

The afternoon dialogue session with City of Ottawa People's services staff was informative and interactive. Respondents felt the session initiated a dialogue between community agencies and the New People's Services.

The issues respondents wanted People's Services to consider in addition to the workshop recommendations were:

- increase access and equity to services especially recreation for the poor;
- direct their attention structures toward existing and emerging needs,
- encourage advocacy;
- direct resources to support agency core funding,
- increase information sharing and assist with fundraising.

Generally, the feeling was that the City was on-track and that dialogue should be on-going.

Respondents had some recommendations regarding next steps for People's Services, namely:

- the development of concrete partnerships,
- the establishment of a fundraising centre and/or a volunteer clearinghouse in partnership with organizations already doing this work,
- assistance to find core funding and with evaluation.
- support and the sponsorship of advocacy groups
- the creation of a clear and open process for agencies to provide input into the City budget process with realistic time-lines which enable agencies to respond.

Finally; with respect to next year's consultation, respondents suggested that there be longer workshops, an overview of new 2001 Census trends, an assessment of the implementation of workshop recommendations by People's Services, an expansion of the knowledge regarding organizational change impacts on community agencies and an exploration of the creation of a community investment loan fund.
