

EDMONTON SOCIAL PLANNING COUNCIL

FINAL EVALUATION REPORT

September, 1987

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## EXECUTIVE SUMMARY

This evaluation was conducted to assist the the Edmonton Social Planning Council to ensure that relevant and appropriate services are being provided and that its scarce resources are being used effectively. It was designed to reassess the Council's role in the community and to examine its service priorities, service delivery strategies, and the appropriateness of its administrative and management structure and procedures.

We conducted interviews with members of the board and staff of the Council as well as with relevant community representatives. In addition, we surveyed Council members for their views on specific issues identified as important for determining the Council's future direction. The views and opinions of approximately 63% of the membership (or 118 out of a total membership of 187) are included in this report.

The following is a summary of our conclusions and recommendations.

### **Is there a need for an independent social planning council in Edmonton?**

The Council was not found to be redundant but, rather, to be playing a unique and important role in the community. Unlike the social planning role played by other community organizations, the Council:

- . emphasizes community-wide program development rather than agency affairs;
- . proceeds from the perspective of the broader, total community, and involves the participation of a wide spectrum of interested parties;
- . serves as a critic of social policies and programs, and as an advocate for the community in matters relating to social issues.

## EXECUTIVE SUMMARY

**Community Demands Versus Internal Initiatives (Issue #1): To what extent should the Council lead, as oppose to follow, the community in addressing social issues?**

We found strong support for the Council to continue in its leadership role in matters of social policy and community development. In contrast, we found little support for restricting Council to the role of unbiased consultant to citizen groups. Also, Council's values and policy decisions were found to be strongly supported by its membership.

Concern was expressed about the need to ensure Council's credibility as a responsible voice for social change. Although we concluded that its credibility is not necessarily jeopardized by declaring its values and acting on them (that is, by taking the position of active social change agent), to ensure its credibility, Council should strive for balance in selecting the issues it champions and formulating the way it chooses to animate the community for social change.

We recommended that the Council:

- 1.1 continue to take a leadership role in matters of social policy and community development, and to strengthen, where possible, its role as active social change agent by
  - . increasing public awareness about the consequences of social policy,
  - . politicizing social issues, and
  - . becoming more actively involved in lobbying for social change.
- 1.2 emphasize balance in selecting and formulating the issues it pursues so as to protect its credibility as a viable social change agent.



## EXECUTIVE SUMMARY

**Program Balance (Issue #2): Should the Council's major focus of programming activity be policy analysis and community development, for example, or should additional resources be directed toward applied research or training and consultation?**

Taking as our guide the degree of importance Council members attributed to the various services and activities provided by the Council, as well as the views of other relevant community representatives, we concluded that Council's staff time should be apportioned to Policy Analysis, Applied Research, Community Development, and Training and Consultation, in that order. However, because of problems in defining Council's functions in those terms, we developed a new model to serve this purpose. This model (i) comes to grips with the question of who Council's constituents are, (ii) addresses the problem of project classification, and (iii) consolidates into clearly identifiable functional units the services and activities associated with Council's three main roles in the community (social action, community planning and development, training and consultation).

We recommended that the Council:

- 2.1 adopt a model that describes the major functions of Council to be, in order of importance:
  - A. Social Action,
  - B. Community Planning and Development,
  - C. Support Services to A and B above,
  - D. Training and Consultation.
- 2.2 use that model to target the amount of staff resources that it distributes to each function.

## EXECUTIVE SUMMARY

- 2.3 obtain, from management, quarterly reports of all projects, services, and activities it has undertaken, categorized in terms of the major functions identified in the model. Those reports should also include estimates of the amount of staff time, including other costs, attributed to the implementation of those projects.

**Fee-For-Service (Issue #3): How can the Council best meet its budgeting demands without unnecessarily limiting its obligations to provide free services to the community?**

There was strong support for Council to continue with the policy of charging a fee for training and consulting services conducted for the benefit of a specific organization or agency. That fee simply should cover the cost of conducting those projects, where possible, and not attempt to generate additional revenue for the Council.

There was concern, however, that fee-for-service work was taking up an increasing amount of staff time and limiting Council's ability to perform its other functions. We concluded that, if necessary, it would be better to reduce the size of Council's paid staff (temporary and/or part-time positions, preferably) to meet its budgeting demands than to pursue fee-for-service consulting engagements simply to preserve its level of staffing.

We recommended that the Council:

- 3.1 limit its pursuit of fee-for-service consulting projects for the primary purpose of preserving its staffing level.
- 3.2 strongly consider reducing its complement of paid staff if it cannot meet its budgeting demands in any other way.

## EXECUTIVE SUMMARY

**Accessibility (Issue #4):** How can members of the Council become more involved in the work of the Council? And, how can Council's services and resources be made more accessible and available?

Council members were satisfied with the amount of input they had on the positions Council has taken in recent years. They also said that they would like to see more opportunities to become involved in the activities of the Council, particularly issue oriented activities. We interpreted the latter finding to mean that there is a relatively large untapped source of people who would like to become more involved in issues affecting the social welfare of the city, and that they think the Council could provide that opportunity.

We also concluded that Council's services and resources were as accessible as practicable at this time, and that the publication **First Reading** should be used to inform readers of the ongoing activities of the Council and to enable them to express their concerns about social issues in the community.

We recommended that the Council:

4.1 provide more opportunities for Council members to become involved in issue oriented activities of the Council. This should include the sponsoring of more

- . events focusing on special topics,
- . opportunities for members to lobby for social change,
- . regularly scheduled meetings for members to discuss issues that are important to them.

## EXECUTIVE SUMMARY

### 4.2 use its publication **First Reading**

- . to apprise readers of relevant upcoming community events, particularly those sponsored by Council;
- . to list and briefly describe the types of activities and projects Council is currently engaged in;
- . to inform readers of Council's major functions; and
- . to provide readers with a tear-out page so that they may inform Council of issues for future Council attention.

**Organization (Issue #5): Are the present management and administrative structure and procedures for making decisions, prioritizing social issues, and establishing long-range strategic plans appropriate?**

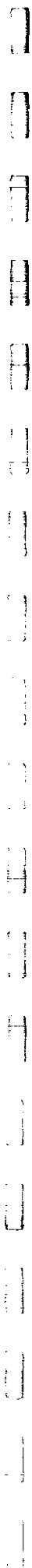
We concluded that the administrative structure of the Council was appropriate, but that improvements could be made in procedures for (i) establishing long-term strategic plans, (ii) developing annual work plans, and (iii) prioritizing social issues.

We recommended that the Board of Directors in consultation with the Executive Director:

- 5.1 develop a five-year plan for the Council, and that at least one board meeting a year be scheduled to review, update, and project that plan to the next five-year period.
- 5.2 debate the relative merits of specific alternative projects, activities, and strategies before the annual work plan is developed and presented for board approval.
- 5.3 develop a set of criteria for prioritizing social issues that will assist both long-term and short-term planning.

**EDMONTON SOCIAL PLANNING COUNCIL**

**FINAL EVALUATION REPORT**



## INTRODUCTION

### BACKGROUND

The Edmonton Social Planning Council is an independent, non-profit organization that has provided service to community groups, social service agencies, and others in and around the City of Edmonton since 1940. During this time, the Council has undergone changes in its role, style, and structure. Some of those changes are reflected in the names the Council has taken over the years.

Originally, the Council was formed to coordinate the work of Edmonton's social agencies and was suitably named the **Edmonton Council of Social Agencies**. However, it soon found itself working with a wide variety of organizations, agencies, groups, and clubs concerned with the improvement of human welfare services. Thus, it changed its name in 1950, to the **Edmonton Council of Community Services**.

The Council's name was changed again in 1963 to the **Edmonton Welfare Council** and finally to the **Edmonton Social Planning Council** in 1967. These latter name changes were intended to reflect the growing importance the Council had placed on research and planning as its principal way of effecting social change.

The Council, however, was to become disenchanted with its ability to influence social policies and programs through research and planning alone, particularly as those activities affected the needs of poor people in the community. The Council began to see itself more as an active social change agent than as a service coordinator and information resource. Social activism through "community development" emerged as the Council's principal role. Although planning and research were not abandoned altogether, animating the community was thought to be a better way to effect change.

## INTRODUCTION

### BACKGROUND (Continued)

In 1972, the Council adopted a new set of objectives to reflect those changes. Those objectives are as follows:

1. The Edmonton Social Planning Council is an agent for social change and development.
2. An objective of the organization is to develop and maintain a voluntary non-governmental capability for informed decision making and action.
3. The Council provides resources to initiate and also to support efforts through which citizen plans can be developed and implemented (Edmonton Social Planning Council, Objects, 1972).

There were also several changes to Council by-laws in 1972, including, among other things, (i) replacing the board of directors and its president by a coordinating committee of up to three co-chairpersons, (ii) eliminating the position of executive director in favor of a coordinator, and (iii) allowing staff to occupy positions on the coordinating committee - the governing body of the Council.

The objectives have been retained, but the by-laws were replaced in 1975 with a more conventional arrangement for a non-profit agency. That arrangement consists of a voluntary board of directors, a full-time executive director who is responsible to the board and to whom staff are in turn responsible, and a prohibition against staff simultaneously serving as board members.

It was also during this period that some staff and board members began to see the Council as an agency that could represent the interest of the socio-economically deprived, that is, as an advocate and voice for those who are unable to organize and to represent themselves and their needs to government



## INTRODUCTION

### BACKGROUND (Continued)

and others who set social policy and sponsor social programs.

The historical information cited above has been taken from "An Analysis of the Edmonton Social Planning Council" by Roger Soderstrom (Master of Arts Thesis, University of Alberta, 1975).

In the twelve years that have intervened between Soderstrom's historical analysis and this evaluation, the Council's role and style of operation have continued to change. These changes can be attributed to a wide variety of interacting forces, such as shifts in

- . social attitudes, issues, and approaches to the solution of social problems;
- . the economic environment (the "boom and bust" of Edmonton's economy);
- . political and governmental responses to social issues, social change, and service delivery;
- . funders' assessments of Council's role and function;
- . the skills and interests of the executive directors and staff of the Council;
- . the makeup, orientation, and agreed role of the Council's Board of Directors; and
- . the vision and enthusiasm of the Council's presidents and its officers.

## INTRODUCTION

### BACKGROUND (Continued)

It is not our task to trace the influences these shifts have had on the Council, but rather to reassess the role of the Council in the community today and help chart its course for tomorrow.

Currently, the Council consists of about two hundred members who represent social service organizations, interest groups, and individuals concerned with the social consequences of public policies and with the development of voluntary social service and community groups in and around the City of Edmonton. It is governed by a board of fourteen volunteer directors, and it employs five full-time staff (including an executive director) and two part-time and two temporary staff.

The Council's **mission** is as follows:

The Edmonton Social Planning Council believes that all people should have the social rights and freedoms to live and work in an environment that enhances individual, family and community growth without restricting the same rights and freedoms for others. The Council seeks to create, to advocate and to support changes in policies, attitudes and actions in order to enhance these social rights and freedoms.

The Council's **goals** are:

- To undertake research into the nature and magnitude of social issues in the community.
- To increase public awareness and understanding of current social issues and to exercise an independent voice in the community.
- To encourage greater public participation in the development of social policies and the implementation of programs.

## **INTRODUCTION**

### **BACKGROUND (Continued)**

To achieve these goals, the Council conducts applied research, provides policy analysis, facilitates community development, offers training programs for board members and staff in the management of volunteer agencies, undertakes consultation assignments, and engages in special projects sponsored by government and non-government agencies.

Expenditures in recent years have been in excess of \$200,000. Approximately half of those funds are provided by the United Way of Edmonton and Area, with the remainder coming from municipal, provincial, federal, and foundation grants, and from donations, membership fees, and fees for service.

### **TERMS OF REFERENCE**

This evaluation was commissioned by the Board of Directors of the Edmonton Social Planning Council. It represents part of an ongoing effort by the Council to ensure that relevant and appropriate services are being provided and that scarce resources are being used effectively. Specifically, the purpose of this project is to reassess the Council's role in the community, including its service priorities, service delivery strategies, and the appropriateness of its administrative structure and management procedures. In other words, the goal of this project is to reassess **what** the agency should be doing and **how** it should be doing it.

This evaluation is not intended to address **how well** the Council is delivering its services. Thus, information and judgments about the effectiveness of its programming strategies and the satisfaction of its clients with services provided are outside the scope of this evaluation.

## INTRODUCTION

### TERMS OF REFERENCE (Continued)

**Focal Issues:** To help focus this evaluation, five issues were identified in the Request For Proposal (dated December 12, 1986). The first four focus on the Council's role in the community, its service priorities, and its service strategies. The fifth focuses on internal issues involving the Council's administrative structure, organization, and management procedures. These focal issues are listed below along with prominent questions to be addressed.

1. **Community demands versus internal initiatives:** To what extent should the Council lead, as oppose to follow, the community in addressing social issues?
2. **Program balance:** Should the Council's major focus of programming activity be policy analysis and community development, for example, or should additional resources be directed toward applied research or training and consultation?
3. **Fee-for-service:** How can the Council best meet its budgeting demands without unnecessarily limiting its obligations to provide free services to the community?
4. **Accessibility:** How can members of the Council become more involved in the work of the Council? And how can Council's services and resources be made more accessible and available?
5. **Organization:** Are the present management and administrative structure and procedures for making decisions, prioritizing social issues, and establishing long-range strategic plans appropriate?

## INTRODUCTION

### TERMS OF REFERENCE (Continued)

Evaluation Steering Committee: In keeping with the evaluation approaches used by the Council, an Evaluation Steering Committee was formed to provide direction and to overview the process of this evaluation. That committee was comprised of the following individuals:

- . Patrick Hirsche - President of the Board of the Edmonton Social Planning Council
- . Andrew McCready - Member of the Board of the Edmonton Social Planning Council
- . Rod Rode - Council Member at large (currently with the Family Service Association of Edmonton)
- . Debby Boddington - Council Member at Large (currently with Group 5)
- . Nancy Hohn - Representative from the United Way of Edmonton & Area
- . Barbara Sykes - Planner with the Edmonton Social Planning Council\*

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\* Barbara Sykes left the employment of the Edmonton Social Planning Council before this engagement was completed.

## INTRODUCTION

### EVALUATION STRATEGY

The sources used to provide the information needed to conduct this evaluation are listed below, along with the methods used. A brief description of each follows.

<u>INFORMATION SOURCE</u>	<u>METHOD</u>
Council Documents	Review
Council President and Council Staff	In-Office Interview
Council Members	Survey by Mail
Relevant Community Representatives	In-Office Interview

**Review of Council Documents:** We reviewed selected Council documents to gain background information on the Council and to help identify the essential features of the issues to be addressed. Those documents included the following:

- . Recent Edmonton Social Planning Council Annual Reports.
- . An Analysis of the Edmonton Social Planning Council; 1975.
- . Social Planning and the United Way: Roles and Relationships; 1980.
- . An assortment of other related documents.

**Council President and Staff Interviews:** Interviews with the president and staff of the Council provided further background information and helped to sharpen our understanding of the issues. Those interviews represent the primary source of information used to assess the Council's administrative structure, organization, and management procedures (Focal Issue #5, see above). The following is a list of those we interviewed:

## INTRODUCTION

### EVALUATION STRATEGY (Continued)

- . Patrick Hirsche - President of the Board and member of the Steering Committee
- . Peter Faid - Executive Director
- . Gayle Dreaver - Project Staff
- . Rose French - Office Manager
- . Tom Grauman - Planner
- . Barbara Sykes - Planner and Member of the Steering Committee

**Survey of Council Members:** Council members represent a large, moderately diverse, group of individuals who have demonstrated an interest in the Council through their membership, and who tend to be very knowledgeable about the network of agencies, organizations, and groups that address social issues in and around the City of Edmonton.

We surveyed Council members to obtain their views about the Council's role in the community, including its service priorities, service delivery strategies, and issues relating to its accessibility. We also assessed their views on recent positions taken by the Council on social issues.

Our approach was, first, to state what the Council was doing in relation to the issue of concern and then to garner respondents' views about the Council's future course of action.

This survey provided the principal source of information on which we based our conclusions and recommendations concerning Focal Issues #1 through #4 above. To the best of our knowledge, it is the first systematic survey of members' views on issues involving Council's activities and strategies. The survey questionnaire, including accompanying cover letters, is attached as Appendix A.

## INTRODUCTION

### EVALUATION STRATEGY (Continued)

The survey was conducted by mail from April 22 to June 5, 1987. All Council members (187) who had paid their dues as of October 1985 were included in our survey. In all, 70% (or 130 members) responded. Twelve of those (or 6% of the total sample) reported that they were unable to complete our questionnaire; the majority of those were either new to the Council or had taken out membership as a gesture of support only and did not feel they knew enough about Council activities and strategies to give informed comment. Thus, the survey results presented in this report are based on the responses of 118 Council members (or 63% of the membership).

The following is brief description of those respondents:

#### Place of Residence:

- . 86% live in and around the City of Edmonton
- . 4% live in and around the City of Calgary
- . 6% live in other locations around the province
- . 4% currently live outside of the province

#### Social Service Involvement:

- . 76% are involved in the planning or delivery of social services

##### Of those:

- 40% are with a government agency or department
- 41% are with a private non-profit agency
- 5% are with a private for-profit agency
- 15% other

#### Council Involvement:

- . 38% have served on the board or on a special committee of the Council



## INTRODUCTION

### EVALUATION STRATEGY (Continued)

#### Council Membership:

- . 25% have been Council members for 1 year or less
- . 36% from between 1 to 3 years
- . 29% from between 3 to 10 years
- . 10% for more than 10 years

**Relevant Community Representative Interviews:** To supplement the information obtained from the survey of Council members, we conducted interviews with an assortment of community representatives to provide a broader, more in-depth, understanding of the Council's role in the community and of the community's perceptions of that role. We selected those individuals in consultation with the Evaluation Steering Committee, on the basis of their ability to provide us with a wide variety of perspectives on the Council. They include past executive directors and past and present board members of the Council as well as others concerned with the social fabric of the community who may or may not have had any direct involvement with the Council. The following is a list of the community representatives we interviewed:

#### a. Past Executive Directors:

1. Betty Hewes - Liberal Member of the Legislative Assembly
2. Alan Shugg - Alberta Social Services

#### b. Past and Present Board Members:

3. Bob McKeon - Catholic Social Justice Commission
4. Karen Munro - Planned Parenthood Association
5. Judy Padua - Clifford E. Lee Foundation
6. Keith Wass - United Way of Edmonton & Area: Retired
7. Ruth Wolf - Council Member

## INTRODUCTION

### EVALUATION STRATEGY (Continued)

#### c. Others:

8. Don Aitken - Alberta Federation of Labour and Council Member
9. Brian Bechtel - Executive Director, Edmonton Food Bank
10. Tariq Bhatti - Director, Health Promotion Division, Edmonton Board of Health
11. Elmer Brooker - President, Edmonton Chamber of Commerce
12. Alice Hanson - Executive Director, Distinctive Employment counselling Services of Alberta, and Council Member
13. Jack Harmer - Director of Planning and Allocations, United Way of Edmonton & Area
14. Hope Hunter - Alberta Alcohol and Drug Abuse Commission and past Staff Member of the Council
15. David Kelly - Assistant Deputy Minister, Alberta Social Services
16. Nancy Kotani - Executive Director, Boyle Street Co-op; Council Member and past Staff Member
17. John Lackey - Executive Director, Edmonton Social Services
18. Jan Reimer - City Alderman and past Council Member and Member of the Board
19. Vicki Strang - Victorian Order of Nurses and Council Member

The following are the results of our investigations.

## ROLE AND SERVICE STRATEGY

Findings and recommendations concerning the Council's role in the community, including its service priorities and service strategies, are presented in this chapter. The chapter has been organized around the following four focal issues.

1. Community Demands versus Internal Initiatives
2. Program Balance
3. Fee-For-Service
4. Accessibility

Findings and recommendations regarding the fifth focal issue, Organization, will be the subject of the next chapter: Management Structure and Procedures.

Before addressing the focal issues themselves, we will discuss a more general question concerning the role of the Council in the community that was not included in our survey of Council members, but was presented to our sample of relevant community representatives: **Is there a need for an independent social planning council in Edmonton?**

We prefaced this question by referring to the fact that the number of organizations and agencies that have a social planning function has increased substantially since the Council was founded. For example, Alberta Social Services, Edmonton Social Services, and the United Way of Edmonton and Area all employ people who perform social planning functions. Can we conclude then that the Council is redundant?

Nobody we interviewed thought that the Council was redundant in this regard. Rather, the Council was seen to be playing a unique and important role in the community.

## ROLE AND SERVICE STRATEGY

We were told that the planning function of the above mentioned agencies centres on the social service programs that those agencies deliver or fund. Because the Council is neither a deliverer nor a funder of social service programs, its role as a planner in this regard is limited, particularly because neither the sponsors of social service programs nor social service agencies, as a collective, have given the Council a mandate to perform such a planning function for them. Thus, the "social planning" role played by the Council clearly is different than the social planning role performed by others in the community.

What the Council is engaged in may be referred to as "community social planning", or "community-wide", or "comprehensive", social planning (see "Social Planning and the United Way: Roles and Relationships", 1980, page 4). This type of planning emphasizes community-wide program development rather than agency affairs. It "proceeds from the perspective of the broader, total community, involving the participation of a wide spectrum of interested parties" (ibid). As one interviewee put it, "at its best, it deals with what should or could be, as opposed to what is - the here and now."

In addition, the Council is seen to be a critic of social policies and programs, and an advocate for the community in matters relating to social issues. Because these activities are very difficult to perform from within a bureaucracy, they also serve to separate the Council's role in the community from that of other social planning organizations. Some of the interviewees' comments that expand on this topic are presented below.

- . [The Council] serves as a counterbalance to government.
- . It functions more as a community catalyst than as a social planner.
- . It establishes action plans - governments don't do this.
- . It is the only organization that has the track record and ability to work with a variety of groups - that has the ability to take an independent stance and foster debate.

## ROLE AND SERVICE STRATEGY

The remainder of this chapter includes a presentation of our conclusions and recommendations followed by a discussion of our findings for each of the four focal issues in turn.

### 1. COMMUNITY DEMANDS VERSUS INTERNAL INITIATIVES

The basic question underlying the issue of community demands versus internal initiatives is: **To what extent should the Council lead, as oppose to follow, the community in addressing social issues?** To help resolve this issue, we assessed the views of its members and others in the community about the Council's leadership role. We also assessed members' views about the positions Council has taken in recent years and about the social issues it has chosen to address.

#### Conclusions

We found strong support for Council to continue in its leadership role in matters of social policy and community development, that is, to continue to declare a stand on social issues and to continue to assume the role of active change agent in relation to those issues. There was little support for restricting Council to the role of unbiased consultant to citizen groups, or to limit it to a less direct social change agent role.

This, of course, does not mean that Council should cease serving as a facilitator and source of information and expertise to other groups and organizations in the community who champion social causes consistent with the values and policies of the Council. What it does mean is that it should not back away from becoming directly involved in social issues, and that the leadership it has displayed in that area is highly regarded and should be enhanced, if possible, but certainly not diminished.

## ROLE AND SERVICE STRATEGY

### 1. COMMUNITY DEMANDS VERSUS INTERNAL INITIATIVES (Continued)

We also found that its members strongly agreed with a representative sample of positions the Council has taken in recent years, and that they supported the social issues it has addressed. In other words, we found no evidence that Council had lost touch with the social values of its membership.

The following are our recommendations.

#### Recommendations

- 1.1 We recommend that Council continue to take a leadership role in matters of social policy and community development, and to strengthen, where possible, its role as active social change agent by
  - . increasing public awareness about the consequences of social policy,
  - . politicizing social issues, and
  - . becoming more actively involved in lobbying for social change.
- 1.2 We recommend that Council emphasize balance in selecting and formulating the issues it pursues so as to protect its credibility as a viable social change agent.

## ROLE AND SERVICE STRATEGY

### 1. COMMUNITY DEMANDS VERSUS INTERNAL INITIATIVES (Continued)

#### Findings and Comments

In assessing the Council's leadership role in the community, we asked Council members to respond to the following statement.

"One aspect of the Council's approach to service involves assuming a leadership role in matters of social policy and community development. That is, rather than simply collecting and disseminating information for others to act on, the Council declares its stand on social issues and assumes the role of **active change agent** in relation to those issues. Do you think the Council should **increase, decrease, or maintain the same level** of social activism?" (Survey question #4)

Responses to this question are summarized in Table 1 below.

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TABLE 1

COUNCIL MEMBERS' VIEWS ON WHETHER THE EDMONTON SOCIAL PLANNING  
COUNCIL SHOULD INCREASE OR DECREASE ITS LEVEL OF SOCIAL ACTIVISM

<u>LEVEL OF ACTIVITY:</u>	<u>RESPONSE*</u>
Increase It	55%
Maintain Same Level	37%
Decrease It	7%

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\* based on 112 of 118 respondents.

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## ROLE AND SERVICE STRATEGY

### 1. COMMUNITY DEMANDS VERSUS INTERNAL INITIATIVES (Continued)

Perhaps the most important finding illustrated in Table 1 above is that only a very small minority (7%) of Council members think the Council should decrease its level of social activism. This is important because there has been a persistent stance taken by some that Council's proper role is to serve as an unbiased source of information and expertise, leaving the championing of social causes to others in the community - that the proper role of Council is to act as consultants to citizen groups concerned with social issues.

This position is based on the argument that the Council's credibility as an unbiased source for social research and policy analysis is jeopardized when it becomes directly involved in promoting and speaking out on social issues. The counter argument is that all research and policy analysis is influenced by the values of those conducting it, that the concept of unbiased research and policy analysis is therefore a myth, and that to identify and act on one's values is the more responsible way to proceed.

A related argument against social activism by the Council is that community organizations, agencies, and specific interest groups representing constituents who are directly affected by specific social policies are the ones who should identify and champion change, not an independent council with no real stake in the issue. The counter to this argument is that it side-steps the fact that there are those in the community who, for one reason or another, are unable to organize and promote their own interests, and that it is necessary and proper that an organization such as the Council advocate for and actively champion their interests.

Although the issue is a controversial one, it is clear from our survey of Council members that there is little consensus for restricting Council to the role of unbiased consultant to citizen groups.



## ROLE AND SERVICE STRATEGY

### 1. COMMUNITY DEMANDS VERSUS INTERNAL INITIATIVES (Continued)

Our interviews with relevant community representatives tended to echo this conclusion. As one interviewee put it, "If not the Edmonton Social Planning Council, someone else in the community will perform the social activist role - the historical presence of the Council in the city gives it some legitimacy [in this area] that is lacking in other organizations." Another indicated that the strength of the Council is in the leadership it displays. This interviewee was even reluctant to complete our questionnaire lest it imply that the Council was becoming "membership driven" - a move she believes would weaken the Council's leadership role.

The other point shown in Table 1 above is that the majority (55%) of Council members indicated that Council should increase its level of social activism. This should not be interpreted to mean that members are unhappy with the level of social activism shown by Council. Rather, the most common sentiment expressed by members was that Council should not back off from its social activist role, that they support and value Council's leadership, and that, if anything, they encourage it to do more in this area. "More of the same" was the phrase used most often.

Table 2 on the next page is a summary of comments Council members made when asked what kind of changes they would like see regarding Council's social activist role.

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TABLE 2

SUMMARY OF COUNCIL MEMBERS' COMMENTS CONCERNING  
COUNCIL'S SOCIAL ACTIVIST ROLE

PRO SOCIAL ACTIVIST ROLE:

- \* 18 of the 53 respondents who commented suggested that Council should attempt to increase public awareness of (i) social issues, (ii) the consequences of government policy, and (iii) the activities of the Council itself through increased use of the media, primarily.
- \* 7 indicated they would like to see Council and its members become more actively involved in lobbying for social change.
- \* 2 suggested that more objectivity is needed if the Council is to be as effective as possible as a social change agent.
- \* SIGNIFICANT COMMENTS:
  - "I believe in the integrity and importance of ESPC as an active change agent; it is a credible and dynamic force in this community. I can only wish it more funding in order to increase its ability to have impact and take meaningful stands."
  - "Enhance such things as Council-MLA-Public forums."

CON SOCIAL ACTIVIST ROLE:

- \* 3 respondents advocated that the Council move away from its social activist role toward one as an "objective research and service agency". They suggested that increasing activism may threaten perceived objectivity and undermine the credibility of the Council's research.
- \* 3 suggested that Council should be more a facilitator than an active change agent, by helping other groups to advocate for themselves
- \* 2 suggested that the Council should help to coordinate agencies and to act as an interagency voice.
- \* SIGNIFICANT COMMENT:
  - "You are a credible organization; to increase [social activist role] may threaten your position as an accurate information source and a reasonable voice to be listened to by politicians."
  - "The credibility of the Council's research is undermined by advocacy on specific issues. I don't believe the two roles can be effectively played by the same organization."

## ROLE AND SERVICE STRATEGY

### 1. COMMUNITY DEMANDS VERSUS INTERNAL INITIATIVES (Continued)

Clearly, the credibility of the Council is a concern of our respondents. Although we do not think that Council's credibility is necessarily jeopardized by declaring its values and acting on them, it is at risk when the Council is perceived

- . to take too narrow a view on social issues,
- . to be too partisan in politicizing social issues,
- . to draw attention to and complain only about the negative aspects of social policy without giving "credit where credit is due."

Perhaps the term "balance" is the most relevant here. The Council's credibility can only be enhanced if it strives for balance in selecting and formulating the issues it champions, and balance in how it chooses to animate the community and, thereby, serve as a force for social change.

We turn our attention now to a concern that relates to the issue of leadership. Organizations that assume an active leadership role run the risk of losing touch with their members, of marching to their own drummer. The Council ensures against this by relying on members of its Board of Directors as a sounding board and final arbitrator of the policies and positions it pursues; it also relies on feedback from the community through public forums and other less formal contacts. We (the evaluation team and the members of the Evaluation Steering Committee) thought it would be informative to assess the extent to which Council can rely on those procedures.

To do this, we polled Council members' views on positions the Council has taken in recent years. This exercise should not be construed as encouraging a "membership driven" approach to policy setting - that would require seeking consensus on issues prior to Council adopting its positions. Rather, it is simply a check to see how closely aligned Council's values on social issues are with those of its members.

## ROLE AND SERVICE STRATEGY

### 1. COMMUNITY DEMANDS VERSUS INTERNAL INITIATIVES (Continued)

We approached this task in two ways. First, we asked respondents to indicate the extent to which they agreed with a sample of statements on social issues selected as being representative of positions taken by Council in recent years (see Table 4). Second, we asked if there were other positions taken by Council that they strongly agreed or disagreed with, and if there are issues that Council has not addressed, but should.

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**TABLE 3**

**COUNCIL MEMBERS' SUPPORT FOR POSITIONS TAKEN BY THE EDMONTON SOCIAL PLANNING COUNCIL. RATINGS WERE MADE USING A SCALE OF 1 TO 10, WITH 1 MEANING "DO NOT AGREE AT ALL" AND 10 MEANING "AGREE FULLY."**

	<b><u>MEAN RATING*</u></b>
1. Cutting back on social programs as a means of lowering the deficit effectively blames the poor and the disadvantaged for our economic decline and, as such, is unacceptable.....	<b>9.0</b>
2. The <u>Individual Rights Protection Act</u> should be revised to include protection for the mentally disabled.....	<b>8.3</b>
3. The federal government must make a commitment to develop a comprehensive system of universally accessible non-profit quality child care.....	<b>8.2</b>
4. Government sponsorship of refugees should continue and the number of refugees should be increased.....	<b>7.4</b>
5. It is completely inappropriate for the payment of welfare benefits to be contingent upon an individual's willingness to work.....	<b>7.3</b>

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\* Based on 118 respondents; Standard deviations range from 2.34 to 2.90

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## ROLE AND SERVICE STRATEGY

### 1. COMMUNITY DEMANDS VERSUS INTERNAL INITIATIVES (Continued)

As shown in Table 3 on the previous page, there is a high degree of support among Council members for positions taken by Council on social issues.

Table 4 on the next page indicates that there is a relatively large number of positions taken by Council that members strongly agreed with (see "A" in Table 4) and only a few that they disagreed with (see "B" in Table 4). Moreover, there were no positions with which members strongly disagreed that were mentioned by more than one respondent.

These findings, taken together with those presented in Table 3 above, indicate that the values expressed by Council, by way of the positions it has taken and the social issues it has chosen to champion, are shared by its members.

The relatively long list of issues that members would like to see Council address (see "C" in Table 4) reveals the breadth of social issues that members feel strongly about. As always, however, the task of Council is to select those issues that are most pressing and deserving of attention, on the one hand, and for which there is the greatest chance of Council having a positive impact, on the other. Ignoring one or the other of these criteria would represent, in our opinion, poor management of the scarce resources available to Council.

**RESPONSES TO THE QUESTION:  
ARE THEIR OTHER POSITIONS TAKEN BY THE COUNCIL THAT YOU:**

**A. STRONGLY AGREE WITH**Responses mentioned more than once:

- Privatization (6)
- Welfare advocacy (4)
- The Other Welfare Manual (4)
- Income security problems (3)
- Minimum wage (2)
- Poverty (2)

Responses mentioned only once:

- Helping the Food Bank's research
- Eradication of balance billing
- Giving at least some attention to rural Alberta
- Child care
- Unemployment
- Youth education
- Recent conference on nurturing community
- Native people
- Discrimination (race, creed, color, handicap)
- Inner city issues (the homeless, alienated youth, plight of psychiatric patients)
- Maternity/paternity leave and benefits

**B. STRONGLY DISAGREE WITH**Responses mentioned only once:

- Daycare: Overlooking the alternatives of private arrangements with family, friends, neighbors, particularly with regards to your children.
- For-profit human services.
- Lubicon land claim
- Acting as though Alberta's health care costs are solely attributed to physicians' fees.
- A tendency to ignore the chaos of child welfare policy in Alberta.

**C. FEEL SHOULD HAVE BEEN ADDRESSED BUT HAVEN'T**Responses mentioned more than once:

- Privatization (3)
- Low wages (2)
- Access to abortion (2)
- Housing (2)

Responses mentioned only once:

- Medicare situation in Alberta
- Link between political patronage and privatization
- Governments' paltry commitment to preventive social services
- Mental Health Act
- Psychologist Professions Act
- Language training for refugees
- Alternative economic models for community economic development
- Federal and provincial tax reform
- Racism in Alberta
- Language rights in Alberta
- Safeguards within institutions guaranteeing patients a minimum of [civil rights] protection
- Rights for sexual minorities
- Feminization of poverty and equal pay for equal work
- Child Welfare issues, especially, the Edmonton Region's current "Five Year Plan" and the disturbing trends in Foster Care.
- Deinstitutionalization/resettlement of ex-psychiatric patients.

## ROLE AND SERVICE STRATEGY

### 2. PROGRAM BALANCE

The basic question underlying the issue of program balance is: Should the Council's major focus of programming activity be policy analysis and community development, for example, or should additional resources be directed toward applied research or training and consultation? To help resolve this issue, we assessed the amount of staff time Council members thought should be devoted to each of Council's four programming areas: Policy Analysis, Applied Research, Community Development, Training and Consultation. We also assessed how important they thought it was that Council continue to provide each of its services and activities.

### Conclusions

According to its members, Council should devote its staff's time to Policy Analysis, Applied Research, Community Development, and Training and Consultation, in that order. We also found a strong correspondence between the amount of staff time members thought Council should devote to each program area and how important they thought it was that Council continue to provide the specific services and activities associated with those program areas.

Because of problems that arose from defining Council's functions in terms of Policy Analysis, Applied Research, Community Development, and Training and Consultation, we developed a new model to describe its functions. That model identifies Council's major functions to be Social Action, Community Planning and Development, Support Services, and Training and Consultation. It is a rearrangement of the services and activities that Council provides according to how important members thought it was that Council continue to provide those services and activities.

## ROLE AND SERVICE STRATEGY

### 2. PROGRAM BALANCE (Continued)

We used that model to derive estimates of the amount of staff time Council should devote to various functions, taking as our guide the degree of importance its members attributed to the various services and activities associated with those functions.

The following are our recommendations.

#### Recommendations

2.1 We recommend that Council adopt a model that describes the major functions of Council to be, in order of importance:

- A. Social Action,
- B. Community Planning and Development,
- C. Support Services to A and B above,
- D. Training and Consultation.

2.2 We recommend that Council use that model to target the amount of staff resources that it distributes to each function.

2.3 We recommend that Council obtain, from management, quarterly reports of all projects, services, and activities it has undertaken, categorized in terms of the major functions identified in the model. Those reports should also include estimates of the amount of staff time, including other costs, attributed to the implementation of those projects.



## ROLE AND SERVICE STRATEGY

### 2. PROGRAM BALANCE (Continued)

#### Findings and Comments

We asked Council members how much staff time they thought should be devote to each of Council's four program areas. We followed that question with a list of activities and services provided in each of the program areas and asked how important it is that Council continue to provide them.

We prefaced the first question with the following statement:

"Currently, the Council provides services in the four program areas listed below. Although all of these may be 'good things to do,' what we need to know is what percentage of Council's staff time you think should be devoted to each area. Adjust your estimates to add to 100%. If you don't think Council should be involved in one or more of these areas, put '0%' in the appropriate place. The goals for each program area have been included to aid you in your decision." (Survey question #1)

As shown in Table 5 on the next page, Council members thought that the majority of staff time should be devoted to Policy Analysis, Applied Research, and Community Development, in that order, and that Training and Consultation should receive the least staff time. In fact, 10% of our respondents thought that Training and Consultation should be eliminated altogether, arguing that others in the community provide services in this area, whereas Council tends to be a unique service provider in the other areas.

Estimates of the actual amount of staff time expended in these areas from January to September, 1986 (as provided by the Executive Director) were, in order: Training and Consultation, 32%; Applied Research, 27%; Policy Analysis, 22%; Community Development, 19%.

## ROLE AND SERVICE STRATEGY

TABLE 5

PERCENTAGE OF STAFF RESOURCES THAT COUNCIL MEMBERS THINK SHOULD BE DEVOTED TO THE EDMONTON SOCIAL PLANNING COUNCIL'S FOUR PROGRAM AREAS. (PROGRAM AREAS ARE LISTED IN ORDER OF MEAN PERCENTAGES.)

	<u>% OF STAFF RESOURCE*</u>
<b>POLICY ANALYSIS:</b> To determine the effects of existing and proposed social policies on individuals and the community and to communicate the Council's positions with regard to specific policy directions.....	32%
<b>APPLIED RESEARCH:</b> To ensure that the nature and the magnitude of social problems in the community are well understood and that delivery of services is appropriate and effective.....	29%
<b>COMMUNITY DEVELOPMENT:</b> To ascertain the collective needs of communities and to assist in the formulation of collective responses to those needs.....	25%
<b>TRAINING AND CONSULTATION:</b> To improve the ability of staff and volunteer board members to manage the affairs and activities of their agencies.....	14%
<b>TOTAL</b>	<b>100%</b>

\* Based on 118 respondents. Standard deviations ranged from 8.0 to 10.1.

We prefaced our second question with the following statement:

"The following is a list of activities provided by the Council in each of the areas listed above. we would like to know how important or valuable you think it is that the Council **continue** to provide these services. Please indicate your response by placing a number from 1 to 10 to the right of each activity, with 1 meaning 'not important at all' and 10 meaning 'extremely important.'" (Survey question #2)

TABLE 6

COUNCIL MEMBERS' RATINGS OF HOW IMPORTANT IT IS THAT THE EDMONTON SOCIAL PLANNING COUNCIL CONTINUE TO PROVIDE THE SERVICES LISTED. RATINGS WERE MADE USING A SCALE OF 1 TO 10, WITH 1 MEANING "NOT IMPORTANT AT ALL" AND 10 MEANING "EXTREMELY IMPORTANT." (SERVICES ARE LISTED IN ORDER OF THEIR MEAN RATINGS WITHIN EACH PROGRAM AREA.)

	MEAN RATING*
<b><u>A. POLICY ANALYSIS</u></b>	
A1. Prepare reports and analyze current and proposed social legislation and its community impact.....	8.7
A2. Advocate for social change through such means as preparing and presenting briefs, meeting with politicians and government officials, and working with the media.....	8.5
A3. Conduct workshops, seminars, forums and conferences to examine social issues.....	8.0
A4. Prepare and distribute the bi-monthly publication, <b>First Reading</b> , on current social issues.....	7.7
A5. Collect, prepare and distribute other reports on social issues.....	7.3
A6. Collect and maintain a library on social welfare issues for Council members and public use.....	6.8
<b><u>B. APPLIED RESEARCH</u></b>	
B1. Initiate and conduct research into the nature and magnitude of social problems in the community.....	8.6
B2. Assist social agencies to collect and interpret information on social trends.....	7.6
B3. Carry out needs assessments and program evaluations for community groups and agencies.....	6.6
<b><u>C. COMMUNITY DEVELOPMENT</u></b>	
C1. Help interagency groups in the community to improve coordination of existing services.....	8.0
C2. Serve as a resource to the community by providing a wide range of information to the general public, the media, agencies and organizations.....	7.9
C3. Assist interest groups in preparing appropriate responses to social policies.....	7.6
C4. Foster an enhanced sense of community by transforming individual initiatives into community ventures.....	6.6
<b><u>D. TRAINING AND CONSULTATION</u></b>	
D1. Provide assistance to senior agency staff and members of agency boards by offering consulting services and making written materials available.....	6.0
D2. Conduct workshops for volunteers and staff of agencies and community groups to improve their ability to manage agency affairs and activities.....	5.7

\* Based on 118 respondents; Standard deviations range from 1.7 to 2.6

## ROLE AND SERVICE STRATEGY

### 2. PROGRAM BALANCE (Continued)

Analysis of the mean group ratings for the activities listed under each program area in Table 6 on the previous page revealed an ordering of program areas remarkably similar to that obtained when respondents were asked to indicate how much staff time should be devoted to each area. This suggests that there is good correspondence between the amount of staff time, or effort, respondents thought the Council should devote to a given program area and how important it is that the Council continue to provide the specific activities associated with that program area.

This latter finding can be seen more clearly by converting the mean group ratings for each program area into percentages (individual group mean ratings divided by the sum of the group mean ratings) and comparing those to the percentages reported in Table 5 above. These percentages are shown below (mean group ratings are in parentheses):

- . Policy Analysis (7.8) ..... 27%
- . Applied Research (7.6) ..... 26%
- . Community Development (7.5) ..... 26%
- . Training and Consultation (5.9) ..... 20%

These percentages as well as those presented in Table 5 above indicate that there is some discrepancy between what Council members think would be an appropriate distribution of staff time and estimates of the actual amount of staff time expended in these areas as presented on page 25. This discrepancy is largest in the area of Training and Consultation (14% in Table 5 and 20% when converted from mean importance ratings, as shown in the above list, versus 32% of actual staff time as estimated by the Executive Director). We will discuss this issue further in the next section, Fee-For-Service.

## ROLE AND SERVICE STRATEGY

### 2. PROGRAM BALANCE (Continued)

Examination of the six activities listed under the program area, Policy Analysis, indicates that the last three activities (A4, A5, and A6; see Table 6) are different in kind from the first three, and can be thought of as being secondary, or support services, as opposed to being primary Policy Analysis services. In fact, they can be thought of as being support services to Applied Research and Community Development just as well.

The following list shows the group mean importance ratings, converted to percentages, after Support Services have been separated out:

- . Policy Analysis (8.4) ..... 23%
- . Applied Research (7.6) ..... 21%
- . Community Development (7.5) ..... 20%
- . Support Services (7.3) ..... 20%
- . Training and Consultation (5.9) ..... 16%

Assuming that Council values the opinions of its members on this issue, the above list could be viewed as a relatively good guide for allocating Council's resources.

We see two problems with recommending this approach, however. First, staff members reported that it is difficult to categorize projects into one or another of those program areas (Support Services being the exception). This is due to difficulties in classifying projects and the fact that projects often involve a mixture of two or more of these activities.

## ROLE AND SERVICE STRATEGY

### 2. PROGRAM BALANCE (Continued)

Second, this classification scheme cannot easily be reconciled with the issue dealt with in the preceding section of this report, Community Demands versus Internal Initiatives. Specifically, in order to determine how Council is expending its resources (and it can not assume to meaningfully influence its future direction without such information), each project would need to be classified on two dimensions: (i) the area of programming it falls into (currently a difficult task) and (ii) whether or not it represents leadership by Council in its role as active social change agent.

To enable Council to have more effective control over how its resources are distributed, it needs to conceptualize its programming options differently. This conceptualization must ensure that broad policy decisions can be meaningfully made, and that these can be carried out easily and appropriately on a day-to-day basis where many of the decisions concerning specific projects are made.

These concerns led us to look for a new way to describe Council's functions. Our goal was to make it easier to determine how Council expends its resources in areas that more directly relate to its role in the community.

By reordering the activities listed in Table 6 by their importance ratings, regardless of which program area they fell into, a relatively straightforward pattern emerged. This pattern, or model, as we will call it, is illustrated in Table 7 on the next page.

TABLE 7

FUNCTIONS OF THE EDMONTON SOCIAL PLANNING COUNCIL

A. SOCIAL ACTION

GOAL STATEMENT	OBJECTIVES
Advocate for social change through such means as preparing and presenting briefs, meeting with politicians and government officials, and working with the media (A2-8.5).	<p>Prepare reports and analyze current and proposed social legislation and its community impact (A1-8.7).</p> <p>Initiate and conduct research into the nature and magnitude of social problems in the community. (B2-8.6).</p> <p>Conduct workshops, seminars, forums and conferences to examine social issues (A3-8.0).</p>

B. COMMUNITY PLANNING AND DEVELOPMENT

GOAL STATEMENT	OBJECTIVES
Serve as a resource to the community by providing a wide range of information to the general public, the media, agencies and organizations (C2-7.9).	<p>Help interagency groups in the community to improve coordination of existing services (C1-8.0).</p> <p>Assist social agencies to collect and interpret information on social trends (B2-7.6).</p> <p>Assist interest groups in preparing appropriate responses to social policies (C3-7.6).</p>

C. SUPPORT SERVICES TO A AND B ABOVE

GOAL STATEMENT	OBJECTIVES
Prepare and distribute the bi-monthly publication, <u>First Reading</u> , on current social issues (A4-7.7).	<p>Collect, prepare and distribute other reports on social issues (A5-7.3).</p> <p>Collect and maintain a library on social welfare issues for Council members and public use (A6-6.8).</p>

D. CONSULTATION AND TRAINING

GOAL STATEMENT	OBJECTIVES
Carry out needs assessments and program evaluations for community groups and agencies (B3-6.6).	<p>Provide assistance to senior agency staff and members of agency boards by offering consulting services and making written materials available (B4-6.0).</p> <p>Conduct workshops for volunteers and staff of agencies and community groups to improve their ability to manage agency affairs and activities (C4-7.7).</p>

## ROLE AND SERVICE STRATEGY

### 2. PROGRAM BALANCE (Continued)

Important characteristics of this model are described below.

The majority of those activities with the highest mean importance rating (8 or higher) were found to share the following characteristics:

- . The constituency to which the activities are addressed is truly **community-wide**; that is, they address issues that are above the interest or concerns of any single community agency or organization, or any group of community agencies or organizations.
- . The goal of the Council in pursuing those activities can be described as **social advocacy** in the broadest sense.
- . The function of those activities can be described as direct, as opposed to indirect, **social action**.

After eliminating the three activities identified as support services, the remaining activities with intermediate mean importance ratings (from 7 to 8) were found to share the following characteristics:

- . The constituency to which the activities are addressed is **groups of community agencies and organizations**.
- . The goal of the Council in pursuing those activities can be described as providing a **community resource** for others concerned with the advancement of social welfare.
- . The function of those activities can be described as **community planning and development**.



## ROLE AND SERVICE STRATEGY

### 2. PROGRAM BALANCE (Continued)

Finally, the three activities with the lowest mean importance rating (below 7) were found to share the following characteristics:

- . The constituency to which the activities are addressed is **individual community agencies and organizations.**
- . The function of those activities is to provide **consultation and training** to staff and board members of those agencies and organizations.

We submit, for adoption by Council, the functional description of Council's activities as illustrated in Table 7 above. We believe that this model is clearer and more appropriate for setting policy decisions than one based on the program areas described as Policy Analysis, Applied Research, Community Development, and Training and Consultation.

We base our recommendation on three factors. The first is that this model comes to grips with the question of who Council's constituency really is. We encountered this seemingly intractable dilemma when trying to identify who to contact as part of this evaluation. Members of the evaluation team and the Evaluation Steering Committee could not come up with a clear description of Council's constituents.

This model indicates quite clearly that Council has different constituents depending on the function of the activity or service provided. These are:

- . **Social Action** - the community at large
- . **Community Planning and Development** - groups of community agencies and organizations
- . **Training and Consultation** - individual community agencies and organizations

## ROLE AND SERVICE STRATEGY

### 2. PROGRAM BALANCE (Continued)

Second, this model addresses the problem of project classification. In the proposed model, classifying a project is simply a matter of determining who the primary constituency (recipient/beneficiary) for a project is. A project aimed at remediating social problems among inner-city youths, conducted in conjunction with a group of youth organizations that will take responsibility for implementing the recommendations, would be classified as Community Planning and Development (the primary constituency is the group of youth organizations, the secondary constituency is inner-city youth).

Third, it consolidates into clearly identifiable functional units the services and activities that are associated with what we have come to see as Council's three main roles in the community (social action, community planning and development, and training and consultation). This should make it easier for Council's governing body (its Board of Directors) to establish meaningful policies in areas of programming that relate directly to how the Council functions in the community. It should also make it easier for management to show how those policies are being implemented.

We used this model to derive estimates of the amount of staff time Council should devote to its various functions. We have taken as our guide the importance that Council members have attributed to the various services and activities that Council performs. We have also assumed that there is a relatively close association between the importance attributed to a given group of activities and the amount of staff time, or effort, those activities should receive. The following are our estimates. Mean importance ratings for the activities within each group (as shown in parentheses) have been converted into percentages of staff time as before. Estimates of the range of staff time to be used as guidelines in allocating staff time are also shown.

## ROLE AND SERVICE STRATEGY

### 2. PROGRAM BALANCE (Continued)

	<u>ACTUAL</u>	<u>RANGE</u>
A. Social Action (8.5) .....	29%	25%-35%
B. Community Planning and Development (7.8) .....	26%	20%-30%
C. Support Services to A and B above (7.3) .....	25%	20%-30%
D. Training and Consultation (6.1) .....	20%	15%-25%

In concluding our examination of the issue of Program Balance, we asked Council members if there were other activities that Council should provide, but doesn't. Only a few respondents (14) commented, and most of their suggestions were for more of the same rather than for different kinds of activities. Those suggestions are summarized in Table 8 on the next page.

## ROLE AND SERVICE STRATEGY

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TABLE 8

SUMMARY OF COMMENTS TO THE QUESTION:  
ARE THERE OTHER SERVICES THE COUNCIL SHOULD PROVIDE?

- \* 5 out of 14 respondents who commented suggested that the Council should be more active in linking other groups with an interest in social issues.

SUGGESTIONS:

- "Establish a confederacy [concerning social policy issues] between such groups as A.T.A., A.A.R.N., A.M.A., F.C.S.S., A.A.S.W, Women's Shelter Board, etc.
  - "[There are] a lot of little groups striving to improve the quality of life that need a coordinating body to help them link together."
  - "Connecting with community leagues would aid both the Council and the public."
  - "More resources [should be put] into preparation of solid research which can be used by a variety of groups seeking change; i.e., develop further as research arm for social service community and consumer groups.
- \* 2 suggested that the Council expand its services (e.g., workshops and consultation services) to communities outside Edmonton.
  - \* 1 suggested setting up a provincial social planning agency.

\* OTHER SUGGESTIONS:

- "First Reading could become more of a 'newsletter' [by including] information on workshops, conferences, interesting projects around the city, etc."
- "Provide practicum placements for social work students."
- "[Council should place] more focus on providing information/advice to government agencies and politicians re: social policies, need and action."

## ROLE AND SERVICE STRATEGY

### 3. FREE-FOR-SERVICE

The basic question underlying the fee-for-service issue is: How can the Council best meet its budgeting demands without unnecessarily limiting its obligations to provide free services to the community? To help resolve this issue, we asked Council members and other relevant community representatives their views about Council's policy of charging for some of the services it provides to individual organizations and agencies. We also examined the types of fee-for-service projects Council has recently been engaged in.

#### Conclusions

Council members overwhelmingly endorsed the policy of charging a fee for training and consulting services conducted for the benefit a specific organization or agency. Also, they thought that Council should continue with its present policy of simply attempting, where possible, to recover the cost of conducting those projects. In contrast, only about a quarter thought that Council should charge more than its cost.

Relevant community representatives were concerned, however, that Council's Training and Consultation function (the function that involves the majority of the fee-for-service work) was taking up an increasing amount of staff time and was limiting Council's ability to perform its other functions.

Our examination of Council's fee-for-service projects conducted during fiscal 1986 revealed few that would qualify as being "community programs in need of low cost consulting services." We concluded that either the demand for such services has been over estimated or Council has not been very successful in identifying those in need of such services.

## ROLE AND SERVICE STRATEGY

### 3. FEE-FOR-SERVICE (Continued)

Ultimately, the fee-for-service issue was reduced to a choice between two options: (i) continue to aggressively pursue fee-for-service consulting engagements to preserve Council's full complement of paid staff, even if it means limiting Council's ability to perform its other functions, or (ii) attempt to meet budgeting demands in other ways, even if it means reducing the size of Council's paid staff. We concluded that, if necessary, it would be better to reduce the size of Council's paid staff (temporary and/or part-time positions, preferably) than to pursue fee-for-service consulting engagements simply to preserve that staffing level.

Adopting that option does not mean that Council should necessarily discontinue its commitment to United Way of Edmonton and Area to provide training and consultation for managers of volunteer agencies and their boards. Projects falling into that category make up a relatively small portion of fee-for-service engagements, and those probably could continue to be provided with minimal drain on staff resources.

The following are our recommendations.

#### Recommendations

- 3.1 We recommend that Council limit its pursuit of fee-for-service consulting projects for the primary purpose of preserving its staffing level.
- 3.2 We recommend that if Council cannot meet its budgeting demands in any other way, that it strongly consider reducing its complement of paid staff.

## ROLE AND SERVICE STRATEGY

### 3. FEE-FOR-SERVICE (Continued)

#### Findings and Comments

When Council members were asked if they thought the Council should engage in fee-for-service activities, 90% of our respondents said "yes". Some qualified their answer by stating that they saw it as a necessary evil, given limitations in the amount of funds Council has at its disposal. Most saw it as a reasonable policy when conducting projects that benefit a specific organization or agency.

We next asked about the policy Council should use to establish its fees. The response to this question is presented in Table 9 on the next page, along with a summary of Council members' comments.

It should be pointed out that the services in question fall in the category of Training and Consultation, and include activities that Council members thought were least important for Council to provide (see Tables 5 and 6 on pages 28 and 29; see also page 43). We do not included grant-based projects in the fee-for-service category.

Although about a quarter of the respondents thought Council should use its Training and Consultation function as a revenue generator, that is, to help offset the cost of conducting its other activities, the clear consensus was for Council to continue its present policy of simply attempting, where possible, to recover the cost of conducting those projects.

## ROLE AND SERVICE STRATEGY

TABLE 9

COUNCIL MEMBERS' VIEWS ON THE CONDITIONS THAT SHOULD PREVAIL WHEN CHARGING A FEE FOR COUNCIL'S SERVICES TO INDIVIDUAL ORGANIZATION AND AGENCIES. (CONDITIONS ARE LISTED IN ORDER OF PERCENT ENDORSEMENT.)

	PERCENT ENDORSE- MENT*
1. Organizations should be asked to pay a reasonable amount to help offset, but not necessarily totally cover, the Council's cost of conducting the work.....	45%
2. Organizations should be asked to pay the actual cost of conducting the work; that is, the Council's cost should be completely covered.....	31%
3. Organizations should be asked to pay more than the actual cost of conducting the work (e.g., 5% or 10% more) to help offset Council's cost of conducting its other activities.....	24%

\* Based on 98 respondents who thought the Council should engage in fee-for-service activities.

### SUMMARY OF COMMENTS

- A. 42 of 69 respondents who commented said that fees should depend on the agency's ability to pay.
- 7 said or implied that fees should be waived for agencies that can't afford to pay at all.
  - 4 pointed out that the agencies that most needed the Council's help were the ones that couldn't afford to pay private consultants or even to cover the Council's costs.
  - 2 suggested that while fees should be set on an ability to pay basis, the organizations requesting help should do the fund-raising, rather than the Council.
  - 2 made the point that having to pay a reasonable fee would make requesting agencies think out their needs more clearly, do better preparation, make more efforts to work with the Council, and to take its services more seriously.
- B. 3 thought that fee-for-service work should be undertaken only if consistent with the Council's goals and objectives.
- C. 2 said Council should not be providing unfair competition for private consultants.



## ROLE AND SERVICE STRATEGY

### 3. FEE-FOR-SERVICE (Continued)

The consensus expressed by our sample of relevant community representatives was that Council's Training and Consultation function, and thus its fee-for-service activities, should be constrained. Some of those representatives noted that the Training and Consultation function, which should be a low priority function in their opinion, seemed to be taking up an increasing amount of staff time. They were concerned that the pursuit of fee-for-service activities may be limiting Council's ability to perform its other functions, especially its ability to respond in an effective and timely manner to emerging community issues.

As may be recalled, Training and Consultation activities were estimated to accounted for 32% of staff time in 1986, the highest amount attributed to any of Council's four programming areas (see page 27). Thus, their concern may be well founded.

There were important differences of opinion on this issues, however. As one interviewee put it, "unlike other similar programs [that provide training for managers of volunteer agencies and their boards, e.g., Grant McEwan Community College], ESPC brings a special commitment and goal orientation - a desire to see the organization be effective. It is an investment in the city's future." Another pointed out that "fee-for-service work is important as a way of diversifying [Council's] funding base."

We identified four arguments for why Council should engage in fee-for-service activities. These are:

1. There is a need in the community for low cost consulting services in program evaluation and needs assessment, and in volunteer agency board/staff training and consultation.

## ROLE AND SERVICE STRATEGY

### 3. FEE-FOR-SERVICE (Continued)

2. Council has responded to this need in the past, particularly in the area of volunteer board/staff training and consultation, and should therefore continue to do so.
3. Council needs to diversify its funding base.
4. Council needs to raise additional revenue to preserve its capability to perform its other functions.

An examination of recent fee-for-service activities helps to put these arguments in perspective. The following is a list of fee-for-service projects conducted during the 1986 fiscal year:

- . Victorian Order of Nurses Evaluation
- . United Way Needs Assessment Guide
- . Lakeland FCSS program (Slave Lake, Alberta)
- . NDP Organizational Review
- . Manitoba Child Welfare Evaluation
- . Suicide Prevention Workshop
- . Training and Consultation Workshops

These seven projects brought in a total of \$26,383, which represents about 10% to 12% of Council's budget for the year.

Unfortunately, we do not know if this list represents a fair sample of the types of fee-for-service projects Council has engaged in over the years, or a unique stage in Council's history. It is clear, however, that in 1986, at least, Council aggressively pursued a wide range of fee-for-service activities. Moreover, it would appear that few of those served would qualify as "community programs in need of low cost consulting services."

## ROLE AND SERVICE STRATEGY

### 3. FEE-FOR-SERVICE (Continued)

Perhaps the Victorian Order of Nurses Evaluation would be an exception to that conclusion, as would the group of projects listed under the heading "Training and Consultation Workshops". (We understand that what is listed as "Training and Consultation Workshops" represents training and consultation to managers of volunteer agencies and their boards.) This latter activity accounted for \$7,014 (or 27%) of the total fee-for-service revenue in 1986.

Two projects (Lakeland FCSS program and Manitoba Child Welfare Evaluation) were for provincially funded agencies and organizations outside of the Edmonton area; and another (NDP Organizational Review) was for a province-wide organization. One of the projects (Suicide Prevention Workshop) appears to be peripheral to the Council's traditional interests and to overlap with provincial initiatives in that area. These combined activities accounted for \$13,868 (or 53%) of the total fee-for-service revenue.

Though there may be a need in the community for low cost consulting services in program evaluation and needs assessment, either the demand for those services has been overestimated or the Council has not been very successful in identifying those in need of such services. Regardless, it would appear that a significant portion of the Council's fee-for-service activities, conducted in fiscal 1986, can best be justified in terms of the last two arguments listed above; namely: Council's need to diversify its funding base, and Council's need to raise additional revenue to preserve its capability to perform its other functions.

We suggest that those arguments can be premised on either one or the other of the following assumptions:

## ROLE AND SERVICE STRATEGY

### 3. FEE-FOR-SERVICE (Continued)

- . There was not enough work to keep Council's full complement of paid staff busy - thus, the fee-for-service projects listed above served to enhance and sharpen staff skills without interfering with Council's ability to perform its other functions.
- . There were not enough funds to pay for Council's full complement of staff - thus, it was necessary to actively pursue a wide range of fee-for-service activities to supplement staff salaries, even if it limited Council's ability to perform its other functions.

We found no evidence to support the first assumption. Rather, the opposite seemed to be more accurate, that there was more than enough work to keep staff busy without taking on additional fee-for-service projects. Thus, given the accuracy of the second assumption, the issue appears to be whether Council should in the future:

- . pursue fee-for-service engagements in order to preserve its full complement of paid staff,
- . find some other source of funding that will not limit Council's ability to perform its other functions, or
- . reduce the size of its paid staff.

We understand that Council has actively investigated other sources of funding with little success, and that the United Way of Edmonton and Area has encouraged the Council to diversify its funding base through the fee-for-service route because of its inability to increase Council's level of funding.

## ROLE AND SERVICE STRATEGY

### 3. FEE-FOR-SERVICE (Continued)

It seems then that the question is whether Council should continue to aggressively pursue fee-for-service activities or reduce the size of its paid staff. Unfortunately, either option would appear to result in a reduction in Council's ability to perform its other functions.

Although this conclusion stems, in large part, from an analysis of only a single year of Council's fee-for-service activities, we believe that it represents the focal point of the issue; namely: to actively pursue fee-for-service contracts or to "stick to one's knitting," even if that means gearing down the size of the organization.

Given these choices, it would appear that the latter one, reducing the size of Council's paid staff (temporary and/or part-time positions, preferably), is the better course to take. This approach is consistent with a sentiment we heard over and over again: "be more selective; concentrate your efforts; do fewer things well rather than a lot of thing less well."

In contrast, pursuing a wide range of fee-for-service work scatters the workload and reduces Council's ability to focus on more important community concerns. Thus, it is more likely to dilute the effort and attention that Council can give to its other functions than would simply reducing the size of its paid staff.

Unfortunately, this is not a simple either or situation, as part of the funding agreement with United Way of Edmonton and Area is to provide training and consultation for managers of volunteer agencies and their boards. However, the number of projects that fall into that category is relatively small, and those could probably be handled with a minimal drain on staff resources. On the other hand, a good argument can be made for dropping this function altogether, and it remains to be seen whether that would lead to a reduction in United Way funding.

## ROLE AND SERVICE STRATEGY

### 3. FEE-FOR-SERVICE (Continued)

An attractive alternative is for Council to decide what types of projects it wishes to undertake, first, and then to seek funding for those projects by entering into contracts with governments or other funding sources. Although this would qualify as fee-for-service work, it would not necessarily be for the benefit of a specific organization or agency, but for the benefit of Council achieving its own goals and objectives.

Before abandoning this issue, two related topics should be addressed:

1. the use of Council's Training and Consultation function to generate additional revenue to help offset the cost of conducting its other activities, and
2. engaging in special projects for which grant-based funding is available.

One proposition was for Council to generate a spin-off, for-profit consulting company. Training and Consultation projects could then be managed through that company, and the company could either negotiate a release-time agreement for the use of Council staff or employ its own staff. Profits would be donated to the Council.

We do not recommend that Council pursue this option. First, we believe that the profits such a company would be able to generate would be minimal, relative to the problems involved in developing and operating such a company; second, there is no shortage of companies in the community that provide such services; and, third, it is not in keeping with Council's traditional role in the community to establish a for-profit enterprise.

## ROLE AND SERVICE STRATEGY

### 3. **FEE-FOR-SERVICE** (Continued)

The other topic, engaging in special projects for which grant-based funding is available, involves submitting grant proposals to conduct research and other special projects in areas of social concern designated, typically, by federal, provincial, or municipal governments. The grant money can then be used to hire staff to conduct the research.

We view this form of activity to be an excellent way for Council to obtain outside funding for projects that it would pursue on its own if it had sufficient resources. This would be similar to seeking contracts to conduct such work as discussed above. However, to apply for grants in areas that are only marginally related to Council's main areas of interest would be counterproductive and would lead to the same problem of diluting the effort and attention Council can pay to its other functions as would the relatively indiscriminate pursuit of fee-for-service work.

## ROLE AND SERVICE STRATEGY

### 4. ACCESSIBILITY

The basic questions underlying the issue of accessibility are: How can members of the Council become more involved in the work of the Council? And, how can Council's services and resources be made more accessible and available? To help resolve these questions, we asked Council members if they were satisfied with the amount of input they had on positions the Council has taken, and if they thought Council should provide more opportunities for members to become involved in its activities.

#### Conclusions

Although Council members said they were satisfied with the amount of input they had on the positions Council has taken in recent years, they also said that they would like to see more opportunities for members to become involved in the activities of the Council, particularly issue oriented activities. We interpreted this latter finding to mean that there is a relatively large untapped source of people who would like to become more involved in issues affecting the social welfare of the city, and that they think the Council could provide that opportunity.

We also examined the types of services and resources Council provides, who they provide them to, and if there was reason to believe that accessibility to those services and resources could be improved. We concluded that Council's services and resources were as accessible as practicable at this time.



## ROLE AND SERVICE STRATEGY

### 4. ACCESSIBILITY (Continued)

The following are our recommendations.

#### Recommendations

4.1 We recommend that Council provide more opportunities for Council members to become involved in issue oriented activities of the Council. This should include the sponsoring of more

- . events focusing on special topics,
- . opportunities for members to lobby for social change,
- . regularly scheduled meetings for members to discuss issues that are important to them.

4.2 We recommend that Council use its publication **First Reading**

- . to apprise readers of relevant upcoming community events, particularly those sponsored by Council;
- . to list and briefly describe the types of activities and projects Council is currently engaged in;
- . to inform readers of Council's major functions; and
- . to provide readers with a tear-out page so that they may inform Council of issues for future Council attention.

## ROLE AND SERVICE STRATEGY

### 4. ACCESSIBILITY (Continued)

#### Findings and Comments

Seventy-four percent of Council members said they were satisfied with the amount of input they have had on the positions Council has taken. Several commented that if they did not have enough input it was their own choice, that the opportunities for more input were available. This indicates that members do not feel at all cut off or isolated from the Council - a finding consistent with an observation made earlier that Council does not appear to be marching to its own drummer, and that the positions it has taken on social issues are in fact quite consistent with those of its members.

Of those who were not fully satisfied with the amount of input they have had, four suggested Council should sponsor more surveys of opinion either like the current survey or through **First Reading**. Others seemed to want to be invited to participate in "think-tank" sessions, to submit briefs, or to sit on advisory committees. A couple said they would like more information on issues currently being dealt with or under review by Council.

Although the majority of Council members said they were satisfied with the amount of input they have had on the positions Council has taken, 68% said they would like to see Council provide more opportunities for members to participate in its activities.

We do not view these findings to be contradictory. Rather, they indicate that there is a number of members who would like to become more involved in issues affecting the social welfare of city residents, and that they see Council as providing a vehicle for that involvement.

## ROLE AND SERVICE STRATEGY

### 4. ACCESSIBILITY (Continued)

When those respondents were presented with a list of potential opportunities for greater involvement in Council's activities, almost half (48%) indicated that a tear-out in the Council publication **First Reading**, whereby members could identify issues for Council's future attention, was a good idea. Many also indicated that they would like to see (i) more events focusing on special topics (Brown Bag Forums, conferences, etc.), (ii) more opportunities for involvement in lobbying for social change, and (iii) more regularly-scheduled meetings for members to discuss issues that are important to them (see Table 10 on the next page).

These findings indicate that Council members are looking for greater opportunities to participate in events, forums, and activities that are issue oriented, than in those that are less issue oriented and more social in nature.

That conclusion is consistent with the finding that Brown Bag Forums were the most popular of the events and activities that Council currently sponsors. Almost half (49%) of our respondents had attended at least one in the last 12 months. Other popular events were the Annual Open House, Council-sponsored conferences and/or workshops, and the Annual General Meeting (see Table 11 also on the next page).

The accessibility of Council's services and resources is a different issue than the involvement of members in the work of Council, although it is closely related to it. Because we were unable to formulate a clear description of who Council's constituents are, or should be, at the onset of this evaluation, we did not formally assess the accessibility of its services and resources for those constituents.

## ROLE AND SERVICE STRATEGY

TABLE 10

COUNCIL MEMBERS' PREFERENCES FOR SOME POTENTIAL OPPORTUNITIES FOR GREATER PARTICIPATION IN THE AFFAIRS OF THE EDMONTON SOCIAL PLANNING COUNCIL. (OPPORTUNITIES ARE LISTED IN ORDER OF THEIR FREQUENCY OF SELECTION.)

	<u>RESPONSE*</u>
1. A tear-out in <b>First Reading</b> whereby members can identify issues for future Council attention.....	48%
2. More events focusing on special topics (e.g., Brown Bag Forums, conferences, etc.).....	40%
3. More involvement in lobbying for social change.....	36%
4. Regularly scheduled meetings where members can discuss issues that are important to them.....	21%
5. More social events such as the annual open house.....	14%
6. Greater involvement in fund raising activities.....	13%
7. Other.....	4%

\* Based on 118 respondents. Percentages do not add to 100 because some members selected more than one activity.

TABLE 11

PERCENTAGE OF COUNCIL MEMBERS WHO PARTICIPATED IN THE FOLLOWING EDMONTON SOCIAL PLANNING COUNCIL EVENTS IN THE LAST 12 MONTHS. (EVENTS ARE LISTED IN ORDER OF FREQUENCY OF PARTICIPATION.)

	<u>PARTICI- PATION %*</u>
1. Brown Bag Forums.....	49%
2. Annual Open House.....	39%
3. Conferences and/or workshops.....	28%
4. Annual General Meeting.....	26%
5. Other events .....	13%

\* Based on 118 respondents. Percentages do not add to 100 because some members selected more than one activity.

## ROLE AND SERVICE STRATEGY

### 4. ACCESSIBILITY (Continued)

Nevertheless, in a couple of our interviews with relevant community representatives (some of who were Council members, or had been closely associated with it, and some who were not), it was clear that there was some uncertainty about the services and resources Council provides. How widespread this uncertainty is, we cannot say.

Part of the confusion of who Council's constituents are, and whether its services and resources are accessible or not, is due to the fact that Council is neither a direct deliverer nor funder of social services. Rather, it serves primarily as a community catalyst for social change.

What then are its services and resources and who should they be accessible to? In its function as social activist (using the model of Council's functions presented in a previous section of this report), Council advocates for social change, often in the name of those in the community who have not been able to organize and promote their own interests. However, because the specific makeup of that constituency is always changing, it is difficult to determine how accessible the relevant services and resources of the Council are for them.

In its community planning and development function, Council serves as a resource to the community by providing information to the general public, the media, agencies, and organizations. It also helps interagency groups coordinate services, interpret social trends, and prepare responses to social policies. Council's constituency is more obvious here; it includes groups of community agencies and organizations as well as members of the public at large. In fact, it is a group that overlaps extensively with the membership of the Council.

## ROLE AND SERVICE STRATEGY

### 4. ACCESSIBILITY (Continued)

We have no reason to believe that accessibility to Council's services and resources that are relevant to that constituency is a significant problem. Many of those constituents attend Council-sponsored activities and events, and all Council members, at least, receive **First Reading**, Council's principal publication. Moreover, copies of that publication are distributed to other public outlets, along with a new publication of Council's, **Alberta Facts**.

Although those constituents should be relatively well informed about the Council, we concur with the suggestion made by a member in an earlier section of this report that **First Reading** should include a "newsletter" section to apprise readers of relevant upcoming community events, especially those sponsored by the Council. This publication could also be used to increase knowledge of, and thus accessibility to, Council's services and resources by briefly describing the activities and projects Council is currently engaged in, and by providing a brief overview of Council's functions. This publication already has an excellent listing of publications that are available on social issues.

Possibly the least well understood service, and thus the least accessible, has to do with Council's Training and Consultation function. Perhaps this is because Council has been ambivalent about how high a profile it should give that function. We do not see any reason to change this until Council decides whether to terminate, limit, or aggressively pursue that function in the future.

Before proceeding to the next chapter and an examination of Council's management structure and procedures, we have presented in Table 12 on the next page a representative sample of some of the more general comments made by Council members who responded to our survey.

## ROLE AND SERVICE STRATEGY

TABLE 12

### GENERAL COMMENTS OF COUNCIL MEMBERS

- "I am very impressed with what I see of the Council and its activities. I see it in a broader role as an information source for Northern Alberta."
- "Consider changing your name to reflect an Alberta perspective not just Edmonton."
- "I have sometimes questioned how interested the Council is in listening to its members, e.g., never responding to interests indicated on membership applications, not keeping track of who is/is not a member."
- "I no longer live in Edmonton; I moved 'back' to Ontario last August. However, I regard the Council and Peter Faid as a top notch agency and a refreshing change in super-conservative Alberta."
- "The Council should be viewed as a non-partisan/independent social planning and facilitation focal point of the communities of Edmonton and province. Therefore [there is a] need for a coherent framework of principles."
- "It is essential to focus [Council's resources] and not try to be all things to all people. Don't get into direct service delivery, such as advocacy for individual welfare recipients."
- "One factor not addressed is the shortage of parking which makes use of the library and attendance at noon-hour forums difficult for many people."

## MANAGEMENT STRUCTURE AND PROCEDURES

The basic question underlying the focal issue referred to as "organization" is: Are the present management and administrative structure and procedures for making decisions, prioritizing social issues, and establishing long-range strategic plans appropriate? To help resolve this issue we examined management and administrative structures and procedures to determine how decisions are made regarding Council's short-term and long-term goals and the projects and activities it selects to realize those goals. We focused specifically on the relationships between the Board of Directors and management in making those decision.

### Conclusions

We concluded that the administrative structure of the Council was appropriate, but that procedures were inadequate for (i) establishing long-range strategic plans, (ii) developing annual work plans, and (iii) prioritizing social issues.

We were unable to identify any formal, recurrent procedure for establishing long-range goals and strategies at either the board or management level. We concluded that long-range strategic planning (such as five-year plans) is a primary responsibility of the board, and that a minimum of one board meeting a year should be set aside for this purpose.

Although procedures appeared to be in place for effective input by the board into the Council's annual work plan, a gap in those procedures was noted. An intermediate step is needed whereby board members are given an opportunity to debate the relative merits of alternative projects and activities, including the general strategies to be used, before the annual work plan is developed and submitted for their approval.



## MANAGEMENT STRUCTURE AND PROCEDURES

In addition to the above findings, and integral to them, we found that procedures for prioritizing social issues were unclear, and that criteria to assist that process had not been sufficiently developed. We concluded that the board should develop a set of criteria for prioritizing social issues that takes into consideration the following:

- a) Council's long-term and short-term goals and strategies;
- b) how pressing and deserving of attention each issues is, relative to others vying for Council's attention; and
- c) the extent to which Council's involvement is likely to have a positive impact.

The following are our recommendations.

### Recommendations

- 5.1 We recommend that the Board of Directors, in consultation with the Executive Director, develop a five-year plan for the Council, and that at least one board meeting a year be scheduled to review, update, and project that plan to the next five-year period.
- 5.2 We recommend that, in addition to identifying the general issues to be addressed in any given year, the Board of Directors, in consultation with the Executive Director, debate the relative merits of specific alternative projects, activities, and strategies before the annual work plan is developed and presented for board approval.
- 5.3 We recommend that the Board of Directors, in consultation with the Executive Director, develop a set of criteria for prioritizing social issues that will assist both long-term and short-term planning.

## MANAGEMENT STRUCTURE AND PROCEDURES

### Findings and Comments

The administrative structure of Council consists of a fourteen member volunteer Board of Directors and a full-time paid Executive Director. The board is formally responsible for setting programming policies and overseeing Council's personnel policies and its finances. The Executive Director is responsible for managing the day-to-day operation of the Council and supervising its staff. Council members, of which there are about 200, are primarily responsible for ratifying board appointees and electing its executives.

This type of structure is typical of non-profit agencies in Alberta, and we found no reason to think it inappropriate for the Council. We did, however, find some procedural shortcomings in the following areas.

Long-Term Strategic Planning: There does not appear to be any time during the year that is set aside for board discussion of Council's long-term plans. Lip service is given to the need to establish such plans, but the topic apparently seldom, if ever, appears as an agenda item at board meetings.

This is unfortunate, for the development of long-term strategic plans can play an important role in guiding virtually all other functions of the Council. For example, they can be instrumental in

- . developing short-term plans, including the annual work plan;
- . prioritizing projects, activities, and strategies that are to be included in those plans;
- . determining, for future hiring purposes, staffing levels and the qualifications of staff needed to achieve Council's goals;

## MANAGEMENT STRUCTURE AND PROCEDURES

### Findings and Comments (Continued)

- . determining, for future board appointments, the types of board members needed to help Council maximize its goals.

Clearly, decisions regarding all of the above will need to be made during the next few years, and often repeatedly, regardless of whether Council establishes long-term strategic plans or not. By generating images of what the Council could and should be like, say, in five years, the board can play an active, as opposed to a passive, role in shaping that future.

We firmly believe that one of the more important functions of the board is to generate images of the future that will guide the development of the Council. Moreover, the development of long-term strategic plans is a valuable tool for providing the direction and level of control that the Council's funders and staff, as well as the public, expect of the board.

Because it is important that Council retain flexibility in its planning, it should establish procedures for reviewing, updating, and modifying its long-term strategic plans on a regular basis, such as yearly. Hopefully, such modifications will not lead to wholesale turnabouts in Council's plans, but rather to modest shifts in those plans reflecting changes that have taken place both within society and the Council. We underline the fact that long-term strategic plans should play a guiding role in charting the Council's future; they should not act as blinders that focus decision making too sharply.

Long-term strategic plans should start from an assessment of whether the model of Council's functions, as presented on page 34 of this report, is a viable and appropriate way to conceive of the Council over the near future, say, over the next five years.

## MANAGEMENT STRUCTURE AND PROCEDURES

### Findings and Comments (Continued)

Given that it is, or that changes are to be made to the model, targets should be established to indicate how much of Council's resources should be devoted to each function (e.g., Social Action, Community Planning and Development, Support Services, and Training and Consultation). These targets should be expressed in terms of ranges, such as 30% to 40% (see page 37).

Next, the planning process should (i) identify major areas of social concern (poverty, day care, the elderly, etc.) that are deemed most worthy of Council's attention, and (ii) indicate what in general is intended to be achieved by expending Council's resources in those areas.

The major areas of social concern can also be prioritized by indicating how much of Council's resources, stated in ranges as above, are to be devoted to each of those areas. It should be noted that most social issues can be addressed through more than one means; some features of the poverty issue, for example, can be addressed through direct social action and others through community planning and development.

This plan can be supplemented by listing the qualifications of staff and board members needed to successfully implement the long-term plan, and the qualifications of the current complement of staff and board members. A comparison of those lists would provide the blueprint for future staff and board appointments.

Annual Work Plan: An issue of some concern among the past and present board members we interviewed was the board's lack of input into the selection of specific projects and activities that make up the annual work plan. As we understand it, general issues are identified annually through a joint "brainstorming" session (or sessions) of the board and management. The Executive Director and senior staff members then develop a work plan that consists of specific projects and activities that they feel are consistent

## MANAGEMENT STRUCTURE AND PROCEDURES

### Findings and Comments (Continued)

with those general issues. This work plan is then submitted for board approval.

This procedure reveals a gap in the board's involvement in the development of the annual work plan. Specifically, the board should be able to debate the pros and cons of selecting and eliminating specific projects and activities, including their related strategies, before the plan is developed and submitted for their approval.

We suggest that once the board (i) determines the amount of resources it wishes to allocate during the year to each of Council's four major functions and (ii) identifies the specific areas of social concern it wishes to address, it should (iii) generate a list of potential projects consistent with those areas and with the Council's long-term strategic plan.

Those projects and activities, along with other ongoing projects and activities of Council, should be categorized under one or another of Council's four major functions. In addition, the intended outcome of each project and activity should be briefly described, and the amount of resources (specifically, staff time) that each requires should be estimated. Clearly, management as well as board involvement in all aspects of this process is required.

These steps will help to ensure that the board has the information it needs to conduct meaningful discussions of the relative merits of including specific projects and activities in the annual work plan, on the one hand, and of the general methods of implementing those projects and activities, on the other.

## MANAGEMENT STRUCTURE AND PROCEDURES

### Findings and Comments (Continued)

Prioritizing Social Issues and Their Related Projects and Activities:  
Criteria for prioritizing social issues and their related projects and activities, including implementation strategies, were found to be poorly developed and seldom used. In a previous section of this report (see page 23) we suggest that these criteria should include an assessment of the following factors:

- . how pressing and deserving of attention the project or activity is, and
- . how probable it is that Council's effort will have the intended impact.

We suggest that equal thought and weight should be given to both of these criteria, as their proper assessment is critical for the effective management of Council's scarce resources.

Another important prioritizing criteria is an assessment of how closely each project or activity is aligned with the areas of social concern identified broadly in the long-term strategic plan and more specifically in the annual work plan.

The steps suggested above for establishing long-term strategic plans, developing annual work plans, and prioritizing projects and activities are summarized on the next two pages.

The development of the annual work plan should proceed in a manner similar to that for the long-term strategic plan, though at a more focused and task specific level. It should also be developed after the long-term strategic plan has been established and updated for the next five year period. Thus, the first two steps listed below relate to the development of both the long-term strategic plan and the annual work plan, with only the degree of specificity involved changing. Steps 3 through 6 are specific to the annual work plan. The suggested criteria for prioritizing specific projects and

## MANAGEMENT STRUCTURE AND PROCEDURES

### Findings and Comments (Continued)

activities are summarized in step 7.

### LONG-TERM AND SHORT-TERM PLANNING

1. Determine the amount of resources Council would like to allocate to its four major functions over the next five years (or over the next twelve months when developing the annual work plan).
2. Identify those areas of social concern Council would like to address over the next five years (or over the next twelve months) and prioritize those in terms of the amount of resources that should be devoted to each.

### SHORT-TERM PLANNING ONLY

3. Generate lists of potential projects and activities Council could engage in that are consistent with the previously identified areas of concern.
4. Categorize each project and activity under one or another of Council's four major functions (for example, projects relating to the poor that fall within the Council's Social Action function or within its Community Planning and Development function).
5. Identify what Council hopes to achieve by expending its resources on each project and activity.
6. Estimate, with management's assistance, the amount of resources (specifically, staff time) involved in implementing those projects and activities.

## MANAGEMENT STRUCTURE AND PROCEDURES

### Findings and Comments (Continued)

7. Prioritize each project and activity, using as criteria relative appraisals of:

- a) how closely aligned the project or activity is with the areas of social concern that have been identified in step 2 above.
- b) how pressing and deserving of attention the project or activity is;
- c) how probable it is that Council's effort will have its intended impact.



## **APPENDICES**

**A: Survey Questionnaire**

**B: Initial and Follow-up Cover Letters**



**APPENDIX A**  
**Survey Questionnaire**

# EDMONTON SOCIAL PLANNING COUNCIL SURVEY

**PART 1: IN THIS SECTION, WE WOULD LIKE TO KNOW YOUR VIEWS ABOUT HOW THE EDMONTON SOCIAL PLANNING COUNCIL SHOULD USE ITS LIMITED RESOURCES TO SERVE THE EDMONTON COMMUNITY EFFECTIVELY.**

1. Currently, the Council provides services in three program areas. Please indicate what percentage of staff time you think should be devoted to each area. Adjust your estimates to add to 100%. If you don't think the Council should be involved in one or more of these areas, put "0%" in the appropriate place. If you think the Council should provide services in other program areas, indicate which areas you have in mind in the space provided. The goals for each program area have been included to aid you in your decision.

	<u>% OF STAFF TIME</u>
<b>APPLIED RESEARCH:</b> To ensure that the nature and the magnitude of social problems in the community are well understood and that delivery of services is appropriate and effective.....	_____ %
<b>POLICY ANALYSIS AND COMMUNITY DEVELOPMENT:</b> To encourage and improve the level of public participation in the development of social policies, programs and services..	_____ %
<b>TRAINING AND CONSULTATION:</b> To improve the ability of staff and volunteer board members to manage the affairs and activities of their agencies.....	_____ %
<b>TOTAL</b>	<b>100%</b>

**OTHER PROGRAM AREAS:**

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\* Any comments you care to make regarding this or any other issues raised in this questionnaire would be appreciated. Please use the last page of this survey or additional paper for your comments.

## EDMONTON SOCIAL PLANNING COUNCIL SURVEY

2. The following is a list of activities provided by the Council in each of the areas listed above. We would like to know how important or valuable you think it is that the Council **continues** to provide these services. Please indicate your response by placing a number from 1 to 10 to the right of each activity, with 1 meaning "not important at all" and 10 meaning "extremely important."

### APPLIED RESEARCH

- a. Initiate and conduct research into the nature and magnitude of social problems in the community.....
- b. Assist social agencies to collect information on social trends.....
- c. Carry out needs assessments and program evaluations for existing programs and services.....

### POLICY ANALYSIS AND COMMUNITY DEVELOPMENT

- d. Analyze and prepare reports about current and proposed social legislation and its community impact.
- e. Prepare and distribute the bi-monthly publication, **First Reading**, on current social issues.....
- f. Collect, prepare and distribute other reports on social issues.....
- g. Collect and maintain a library on social welfare issues for council members and public use.....
- h. Conduct workshops, seminars and conferences to examine social policy issues and help interest groups prepare appropriate responses.....
- i. Assist groups of agencies to improve the coordination of existing services.....
- j. Help interagency groups in the community improve coordination of existing services.....

### TRAINING AND CONSULTATION

- k. Conduct workshops for agency volunteers and staff to improve their ability to manage agency affairs and activities.....
- l. Provide written materials regarding agency management and planning to senior agency staff and executive members of agency boards.....
- m. Provide confidential assistance to senior agency staff and executive members of agency boards.....

EDMONTON SOCIAL PLANNING COUNCIL SURVEY

3. Do you think the Council should provide other services or activities, not included in the above list? Use the same number system as you used in Question 2 above to indicate how important or valuable you think it is that the Council provides these activities.

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**PART 2: IN THIS SECTION, WE WOULD LIKE TO KNOW YOUR VIEWS ABOUT THE ROLE OF THE COUNCIL IN THE COMMUNITY AND THE EXTENT TO WHICH YOU ARE IN AGREEMENT WITH THE COUNCIL'S PAST POSITIONS ON SOCIAL POLICY ISSUES.**

4. One aspect of the Council's approach to services, involves assuming a leadership role in matters of social policy and community development. That is, it declares its stand on social issues and assumes the role of **active change agent** in relation to those issues. Do you think the Council should increase, decrease, or maintain the same level of social activism? (Circle the appropriate letter.)

a. Increase      b. Decrease      c. Maintain same level

5. The following are some positions on social issues the Council has championed. Please indicate the extent to which you support these positions by placing a number from 1 to 10 to the right of each statement. Use 1 to mean you "do not agree at all" and 10 to mean you "agree fully".

- a. Government sponsorship of refugees should continue and the number of refugees should be increased.....
- b. The Individual Rights Protection Act should be revised to include protection for the mentally disabled.....
- c. The federal government must make a commitment to develop a comprehensive system of universally accessible non-profit quality child care.....
- d. It is completely inappropriate for the payment of welfare benefits to be contingent upon an individual's willingness to work.....
- e. Cutting back on social programs as a means of lowering the deficit effectively blames the poor and the disadvantaged for our economic decline and, as such, is unacceptable.....

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EDMONTON SOCIAL PLANNING COUNCIL SURVEY

6. Has the Council taken an active position on any social policy issues, other than those listed above, that you have strongly disagreed with? If so, what are they?

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- 7 Are you satisfied with the amount of input you as a council member have on positions taken by the Council? (Circle the appropriate answer.)

Yes No

- 7.1 If not: Do you have any recommendations for how members could have more input?

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8. The Council currently conducts research and evaluations for some agencies on a contractual basis. This has raised several issues about which we would like to know your views.

- 8.1 Do you think the Council should engage in fee-for-service activities? (Circle the appropriate answer.)

Yes No

- 8.2 If you think it is appropriate for the Council to charge a fee for services to individual agencies, which of the following conditions should prevail? (Circle the appropriate letter.)

- a. agencies should pay what they can afford, that is, to help offset the Council's cost of conducting the work.
- b. agencies should pay the total cost of conducting the work; that is, the Council's cost should be completely covered.
- c. agencies should pay more (e.g., 5% or 10%) than the cost of conducting special projects for agencies and use the profit to help offset the cost of conducting other activities that benefit a wider audience.

EDMONTON SOCIAL PLANNING COUNCIL SURVEY

PART 3: SO THAT WE CAN COMPARE YOUR VIEWS WITH THOSE OF OTHER COUNCIL MEMBERS, WE'D LIKE TO KNOW MORE ABOUT YOU.

9. Are you an employee, board member, or volunteer worker of a social service agency, organization or department?

Yes No

If Yes, please answer the following by circling the appropriate letter:

- 9.1 Where is your agency located?

- a. in or around the City of Edmonton
- b. in or around the City of Calgary
- c. in Alberta, but not in or around Edmonton or Calgary
- d. outside Alberta

- 9.2 What kind of an agency is it?

- a. a government agency or department
- b. a private non-profit agency
- c. a private for-profit agency

10. Have you ever served on the ESPC Board? Yes No

- 10.1 Would you like to? Yes No Maybe

11. Have you ever served on a special committee of the ESPC? Yes No

- 11.1 Would you like to? Yes No Maybe

12. How many years have you been a member of the Council? \_\_\_\_\_

13. Do you think the Council should provide more opportunities for members to have input into Council activities? Yes No

- 13.1 If so, in what way (circle as many letters as apply):

- a. more socials such as the annual open house?
- b. regularly scheduled meetings where members can discuss issues that are important to them?
- c. more meetings focusing on special topics, e.g., Brown Bag Forums?
- d. a tear-out in First Reading whereby members can identify issues for future Council attention?
- e. more involvement in lobbying for social change?
- f. greater involvement in fund raising activities?



**EDMONTON SOCIAL PLANNING COUNCIL SURVEY**

**ADDITIONAL COMMENTS:**

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**YOUR CONTRIBUTION TO THIS EFFORT IS GREATLY APPRECIATED. THANK YOU.**



**APPENDIX B**

**Initial and Follow-up Cover Letters**



T.D. WEIDEN & ASSOCIATES LTD.  
11763-35A Avenue  
Edmonton, Alberta  
T6J 0B4  
- (403) 434-4985 -

April 22, 1987

Dear Council Member:

The Edmonton Social Planning Council is currently reevaluating its role in the community, its service priorities, and its service delivery strategies. This evaluation is part of ongoing efforts by the Council and its Board to ensure that relevant and appropriate services are being provided and that scarce resources are being effectively used.

Our company, T. D. Weiden & Associates Ltd., has been commissioned by the Board to assess your views, as a Council member, on these issues, and to solicit any suggestions you may have concerning the Council's future course.

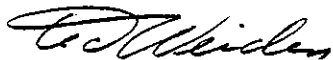
We are asking all Council members to provide feedback on these issues by completing the enclosed questionnaire. In order for the result to truly represent the thinking of Council members, it is important that every questionnaire be completed and returned.

Please take a few minutes now to let us know your views on these issues. We have included a stamped, self-addressed envelope for your convenience. We will need to receive your completed questionnaire no later than Friday, May 15th. The results of this survey will be made available to Council members in an upcoming issue of **First Reading**.

Please be assured of complete confidentiality. The questionnaire has an identification number for mailing purposes only. This is so that we may remove your name from our mailing list when your questionnaire is returned. Your name, or the name of your organization, will never be placed on the questionnaire.

If you have any questions or comments about this survey, please write or call; our telephone number is 434-4985.

Sincerely,



Ted Weiden,  
President

T.D. WEIDEN & ASSOCIATES LTD.  
11763-35A Avenue  
Edmonton, Alberta  
T6J 0B4  
- (403) 434-4985 -

May 11, 1987

Dear Council Member:

About two weeks ago I wrote to you seeking your views about the Edmonton Social Planning Council. As of today, we have not yet received your completed questionnaire.


I am writing to you again because of the significance each questionnaire has to the usefulness of this study. In order for the results of this study to be truly representative of the views of council members, it is important that we receive your completed questionnaire.

Please take a few minutes now to let us know your views about the Council. Send your completed questionnaire to the address on our letter head at your earliest convenience.

In the event that your questionnaire has been misplaced, a replacement is enclosed. If you have any questions about this survey, please call me, Ted Weiden, at 434-4985, or the Edmonton Social Planning Council office, at 423-2031.

Your cooperation is greatly appreciated.

Sincerely,

  
Ted Weiden,  
President