

EVALUATION  
OF ACAP  
FORUM ON  
SUSTAINABILITY

AIDS Community  
Action Program (ACAP)

FINAL REPORT

August 26, 1996



# EXECUTIVE SUMMARY

Unknown levels of future federal support have created considerable uncertainty among AIDS service organizations (ASOs) that are receiving funding through the AIDS Community Action Program (ACAP). To respond to this uncertainty and the importance of the work that is being done through funded projects, ACAP organized a forum for funded ASOs in the Manitoba/Saskatchewan region. The forum had four objectives:

- to provide an opportunity for ACAP funded projects to network and share information;
- to provide sponsoring agencies with information on issues, strategies and tools related to sustainability;
- to assist sponsoring agencies to develop frameworks for sustainability; and
- to provide ACAP with the experience required to develop/refine plans for similar forums to be held in other regions in Canada.

An independent evaluation of the forum was conducted by The Development and Communication Project Group (TPG), a Winnipeg-based consulting firm. This report presents the major findings of the evaluation.

Outcome measures that were examined indicate that the forum was very effective in addressing its objectives.

- Participants from ASOs had high expectations for the forum. More than half (52%) of participants felt that their agencies could benefit a lot through their participation. Another 44% of the participants indicated that their ASOs could benefit quite a bit. Only 4% of the participants held more modest expectations for the forum.
- Participants rated the forum very favourably compared to other workshops and conferences they had attended. Forty percent of the participants rated the forum as excellent relative to other conferences while the remaining 60% rated the forum as good. These comparative ratings are impressive given the high expectations that participants had for the forum.
- The opportunity to network and to share information was consistently cited by participants as one of the highlights of the forum. For example, over 90% of participants indicated that the small group session was either very or somewhat useful in helping them examine the meaning of sustainability.
- Participants indicated that the forum provided them with a chance to become more familiar with various aspects of sustainability. More than 80% of participants reported that they had become quite a bit or a lot more aware of issues, strategies and tools related to sustainability.
- Most participants had a very limited familiarity with strategies that can be used to enhance sustainability prior to the forum. Almost half of (48%) of participants reported that they were either not at all familiar or only somewhat familiar with program evaluation.

Participants were even less familiar with the other strategies. Most participants were not at all or only somewhat familiar with organizational planning methods (58%) and marketing and communications (68%). The vast majority of participants had a limited familiarity with strategies to influence policy (75%), direct market fund raising (83%) and private sector partnerships (92%).

- A large majority of participants felt that the workshops on specific strategies to enhance sustainability had been useful to them. Approximately 75% of participants felt that the workshops on marketing and communication and private sector partnerships had been either quite useful or very useful. More than 80% of the participants who had attended the workshops on direct market fund raising and influencing policy felt that these workshops had been very useful. Not a single participant felt that either of these two workshops were less than quite useful.
- Participation in the forum's workshops substantially increased familiarity with these strategies. More than 75% of participants reported that they had become quite a bit or a lot more familiar with direct market fund raising. More than 45% of participants also reported substantial increases in their familiarity with influencing policy, marketing and communications, organizational planning methods, and private sector partnerships.
- Perhaps the strongest indicator of the impact of the forum was the extent to which participants came away with tangible ideas to apply in their work at their ASOs. By the end of the forum, almost all (95%) of the participants reported that they had developed plans to apply what they had learned.
- The forum appears to have contributed to substantial shifts in the way that participants view sustainability. For many, the concept of sustainability was broadened from an emphasis on finances, particularly funding from government, to other areas in which ASOs have more direct control.
- While participants left the forum with diverse understandings of the meaning of sustainability, most participants reported an increased interest in collaborating with other ASOs, other non-profit groups, and other sectors.
- The participants also reported that the forum had provided them with the chance to renew their energies. The retreat-like site for the forum and the mix of working sessions and informal networking activities contributed to this feature of the forum.

The forum was less effective in providing for skill development. This appears to have been a function of the limited time that was available for workshops during the event. As a result, it is recommended that ACAP examine ways it can support skill development as a follow-up to the forum. This could include sponsoring workshops at the local level to promote skill development in areas that have been identified by ASOs at the forum, as well as supporting networking activities among ASOs as a means of promoting skills transfers.

Based on the findings of the evaluation, it is also recommended that ACAP consider the following measures to enhance the effectiveness of future forums:

- ACAP should consult more closely with ASOs to provide for their input in designing the forum while maintaining the program's control over detailed planning functions.
- Agendas for future forums should include an emphasis on improving the internal operations of ASOs as an important strategy for sustainability. This would include such topics as program planning and evaluation, volunteer management, and board development.
- The length of the forum should be increased by at least one half-day to provide additional time for participation in workshops on specific strategies related to sustainability.
- Consideration should be given to scheduling the forum to include weekend days to promote the participation of board members and other volunteers who are employed in full-time jobs outside of ASOs.
- ACAP should request that ASOs send three representatives to attend future forums with at least one being a senior staff person and another being a senior policy volunteer (i.e. board member). This would allow all agencies to benefit equally from participation and would also ensure input from both management and governance levels.
- ACAP should extend formal invitations for representation to provincial jurisdictions so as to provide ASOs with an organized venue in which to examine a full range of funding and programming opportunities.



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## **I.0 BACKGROUND TO THE FORUM**

Unknown levels of future federal funding have created considerable uncertainty among AIDS service organizations (ASOs) that are receiving funding through the AIDS Community Action Program (ACAP). In response to this uncertainty and the importance of the work that is being done through funded projects, ACAP has been considering ways to assist ASOs in planning for the future.

In keeping with ACAP's principles of community development and health promotion, the program is interested in sponsoring regional forums to provide ASOs with an opportunity to share their ideas and experiences with one another and to examine issues and strategies related to sustaining the progress they have made to date.

The Manitoba/Saskatchewan region was chosen to organize the first of the regional forums on sustainability. It was hoped that this initial forum would provide benefits to the ASOs in the region. This forum also provides ACAP with experience that can be applied to the planning and implementation of subsequent forums to be held in other regions.

To provide an independent perspective, ACAP retained The Development and Communication Project Group (TPG), a Winnipeg-based consulting firm, to evaluate this first regional forum. TPG has extensive experience working with community-based and government agencies in areas related to strategic planning, research and evaluation.

This report presents the major findings of the evaluation. The body of the report is organized into three sections.

Section Two - this section of the report provides an overview of the forum as it was planned and discusses a number of the challenges that faced ACAP in its efforts to organize the event. The section also provides a brief description of the evaluation framework that was developed for the forum.

Section Three - this section presents the major findings of the evaluation. This includes a discussion of levels of satisfaction among participants, the extent to which the forum appears to have met its objectives, and the strengths and weaknesses of the event.

Section Four - the concluding section explores the implications of the findings for efforts to organize similar forums in other regions.

A series of appendices to the report includes the forum's agenda as well as copies of the survey instruments that were used in the evaluation.

## **2.0 FEATURES OF THE FORUM AND THE EVALUATION**

ACAP's first regional forum on sustainability was held June 10 -13, 1996. This section of the report discusses some of the major challenges that faced ACAP in efforts to organize the event. The section also describes the objectives that ACAP developed for the forum and provides an overview of the agenda for the event. Finally, the section sets out the evaluation framework that was used by TPG in its work during and immediately after the forum.

### **2.1 Challenges in Organizing**

While the forum on sustainability was relatively small, ACAP faced a number of challenges in organizing the event. Based on discussions with ACAP officials, three of these challenges appear to have been especially important.

- ⊖ Broad Definitions of "Sustainability" - sustainability has become a popular term for many but lacks a clear definition. Given the breadth and variety of groups working in areas related to HIV/AIDS, it is unlikely that ASOs share a working definition. The diversity of opinion as to the meaning of sustainability makes it difficult to develop a clear focus for a four-day event, especially a focus that would appeal to all prospective participants.
- ⊖ Concerns Regarding Unknown Levels of Future Federal Funding - most of the ASOs in Manitoba and Saskatchewan that were to be invited to attend the forum are dependent on ACAP funding to maintain all or many of their activities. In the context of this uncertainty, it was likely that some if not many prospective participants would view a forum on sustainability as a strategy to prepare them for the loss of federal support.
- ⊖ Tight Time Lines for Organizing - the decision to hold the first regional forum in June was made fairly late in the spring. This provided limited time for organizing activities. As well, a number of other HIV/AIDS-related events were scheduled to occur within the weeks before or following the forum.

ACAP's organizing activities were designed, at least in part, to address these challenges. Measures taken to address these challenges are also reflected in the objectives and agenda that were developed for the forum.

### **2.2 Forum Objectives and Agenda**

The forum was planned as a four-day event to be held in a conference centre in the town of Russell, Manitoba. Russell is situated along the Manitoba/Saskatchewan border and is no more than about four hours drive for any of the funded ASOs in the region. Its conference centre also

provides a retreat-like setting that would remove participants from the every day demands of work and family while attending the forum.

Called *Towards a Sustainable Future*, the forum had four primary objectives:

- ↳ to provide an opportunity for ACAP funded projects to network and share information;
- ↳ to provide sponsoring agencies with information on issues, strategies and tools related to sustainability;
- ↳ to assist sponsoring agencies to develop frameworks for sustainability; and
- ↳ to provide ACAP with the experience required to develop/refine plans for similar forums to be held in other regions in Canada.

While ASOs had expressed their interest in such an event with the regional ACAP Program Consultant during site visitations, they received the first formal notice of the event in letters dated May 6th. These letters were requests to participate – all 14 agencies that were receiving funding in the two provinces were advised that they were "expected to participate" in the forum. This strong wording was meant to emphasize the importance of participation at the forum. The ASOs receiving operational funding were requested to send three representatives while most of the other agencies were requested to send two representatives.

Representatives to be sent by the ASOs could include staff, board members, volunteers or a combination of these persons but the following selection criteria were recommended:

- ↳ familiarity with the overall operations of agency programs;
- ↳ an ability and willingness to participate actively; and
- ↳ have some responsibility for the agency's sustainability.

ACAP also invited one representative from the health departments of each of the provincial governments to attend and participate in the forum.

The agenda for the forum was designed to provide for a balance between working sessions and opportunities for informal networking. An emphasis on networking was seen to be important as a means to promote both information sharing and the development of stronger inter-agency relationships among ASOs in the region. A brief overview of the forum's agenda is provided below (a more detailed agenda can be found in Appendix 1).

Day One: Monday, June 10th

*Goals: to provide participants with an overview of the forum's objectives and to make final preparations with individuals who were to serve as resource persons and facilitators.*

Evening	Dinner Meeting Planning Meeting	Greetings/Introductions Meeting with Resource Persons and Small Group Facilitators
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Day Two: Tuesday, June 11th

*Goals: to provide participants with an opportunity to share information on sustainability and to discuss its meaning in the context of their agencies' activities.*

Morning	Large Group Session	Review of Agenda Community Group Sharing Panel Discussion - Strategies for Sustainability
Afternoon	Small Group Sessions Large Group Session	What is Sustainability Report Back from Small Groups
Evening	Dinner Event	Trip to Small Rural Restaurant

Day Three: Wednesday, June 12th

*Goal: to provide participants with an opportunity to learn about specific strategies and tools that relate to sustainability.*

Morning	Concurrent Workshops	Small Workshops on Strategies and Tools Related to Sustainability
Afternoon	Concurrent Workshops	Repeat of Morning Workshops
Evening	Dinner Event After Dinner Event	BBQ Karaoke

Day Four: Thursday, June 13th

*Goals: to provide participants with an opportunity to discuss what they learned at the forum, to discuss the event's strengths and weaknesses, and to discuss issues related to sustainability with federal and provincial representatives.*

Morning	Large Group Session	Preliminary Findings of the Evaluation; What Have We Learned at the Forum?; and Q & A Session with Federal and Provincial Government Representatives
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The workshops on Day Three were key features of the forum. A total of five different workshops were scheduled. Workshop descriptions that were shared with participants prior to the forum are provided below.

**Marketing Your Organization: Building a Communications Plan** - this workshop focussed on the connection between community groups' marketing plans and sustainability. How can ASOs work effectively with the media? How can ASOs most effectively market their programs to garner support from the public, the private sector and government?

**What's In It for Me: Building Private Sector Partnerships** - This workshop focussed on developing relationships with the private sector with the goal of receiving financial support and support in-kind and on how developing these relationships can assist in organizational sustainability.

**Influencing Policy and Reaching Decision Makers** - This workshop examined the important role that community partnerships play in building and achieving organizational and program sustainability.

**The Path to Financial Self-Sufficiency: Target Market Fund Raising** - This workshop examined various fund raising strategies with an emphasis on "target marketing". This workshop also discussed the relationship between funding source control and sustainability.

**Let's Talk About Evaluation** - This workshop examined the relationship between ongoing evaluation and sustaining programs with an emphasis on participatory evaluation techniques. Did the ASO do what it wanted to do? What did the ASO learn about what worked and what didn't work? What difference did it make that the ASO did this work? How can ASOs plan to use evaluation findings for continuous learning?

Arrangements were made for external resource persons to facilitate three of the five workshops. These individuals were known to the regional ACAP Program Consultant and had extensive experience in their workshop areas. They also had a sensitivity to issues related to AIDS/HIV but very limited prior involvement with ASOs. The workshop on influencing policy was facilitated by an ASO staff person who has played and continues to play a lead role in the Saskatchewan AIDS Network (SAN). The regional ACAP Program Consultant was scheduled to facilitate the workshop on evaluation.

## 2.3 Evaluation Framework

Based on the review of plans that had been developed for the forum and consultations with ACAP officials, TPG developed seven questions to guide evaluation activities. These questions are presented below in four major issue categories.

### ○ Forum Planning

- I. To what extent were participants involved in planning efforts related to the forum?

2. Were forum participants satisfied with the extent to which they were involved in planning the forum?
- Implementation
    3. Was the forum implemented as had been planned?
  - Outcomes
    4. To what extent did the forum:
      - i. provide an opportunity for sponsors of ACAP funded projects to network and share information?;
      - ii. provide sponsoring agencies with information on issues, strategies and tools related to sustainability?; and
      - iii. assist sponsoring agencies develop frameworks for sustainability?
  - Strengths and Weaknesses
    5. To what extent did participants find the forum to be of benefit to their agencies?
    6. What elements of the forum were most effective?
    7. What elements of the forum were least effective?

Three complementary types of activities were undertaken to gather the information required to address these questions.

- Interviews with ACAP Officials - informal interviews were completed with the regional ACAP Program Consultant and the national ACAP Coordinator during, and after the forum to discuss issues and concerns.
- Surveys of Forum Participants and Resource Persons - survey questionnaires were completed by participants before the forum and at the end of the second, third and fourth days of the event. Pre- and post-forum questionnaires were also completed by the resource persons who facilitated workshops (copies of the questionnaires can be found in the appendices).
- Participant Observations - the lead TPG consultant attended all four days of the forum and observed or participated in most forum activities.

As indicated through a review of the report's appendices, survey questionnaires were used extensively during the forum. Participants were advised that the experience gained from the forum was to be used in planning forums for other regions and that the questionnaires had been designed to maximize their input into future planning. TPG would like to acknowledge the cooperation of participants and the thoughtful manner in which they completed their questionnaires.

Readers should note that a follow-up questionnaire will be sent to forum participants in October, 1996. This questionnaire will examine the extent to which participants have been able to apply what they may have learned at the forum to the situation of their ASOs in the months following the event.

## **3.0 EVALUATION FINDINGS**

The findings of the evaluation have been organized into four sub-sections. The first of these examines the pre-forum expectations of participants and their level of satisfaction with the roles they played in planning the forum. The second sub-section describes major features related to the implementation of the forum. These include the differences between what was planned and what occurred as well as the animation activities of the regional ACAP Program Consultant. The third sub-section examines a range of indicators related to the outcome of the forum. The final sub-section discusses the forum's major strengths and weaknesses.

### **3.1 Participant Roles and Expectations**

As indicated earlier, time lines for organizing the forum limited the extent to which prospective participants could be involved in planning efforts. Their limited involvement also reflected a decision taken by the regional Program Consultant to ensure that ACAP was able to maintain control over the detailed planning of the forum. Rather, the Program Consultant had consulted with ASOs during site visitations in the six months before the event to identify levels and key areas of interest.

While the ASOs had been consulted, the vast majority of participants felt that they had not played a role in planning the forum. Ninety-two percent of the participants who completed the pre-forum survey indicated that they had had no involvement in planning (see Figure 1). Only one (4%) of the participants felt that s/he had been involved in decision making while another participant felt that s/he had been consulted.

However, most (77%) of the participants seemed to be satisfied with not having been involved in planning (see Figure 2). A significant minority was less satisfied. One in every four participants indicated that they would like to have been more involved in planning than they had been. A small number of these participants expressed strong dissatisfaction with the absence of pre-forum consultations.

The three outside resource persons who had been asked to facilitate workshops also appear to have had limited roles in planning the forum. One of these individuals indicated that s/he had been consulted but the other two felt that they had no role in planning efforts. One of these two individuals indicated that s/he would have liked to have had a more meaningful role in planning.

Figure 1  
Extent to Which Participants Were Involved in Forum Planning

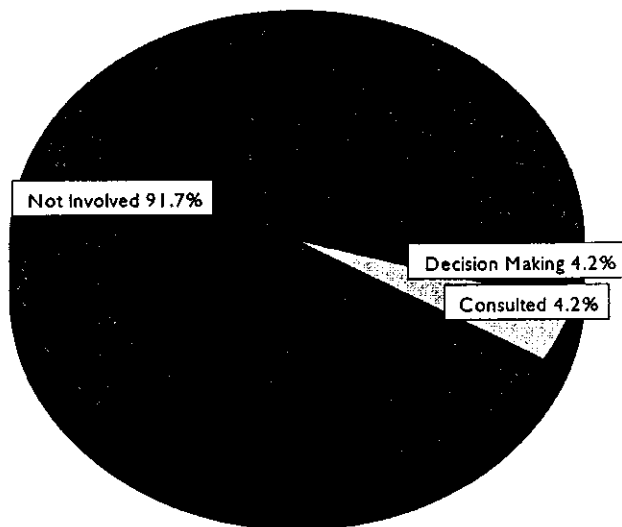
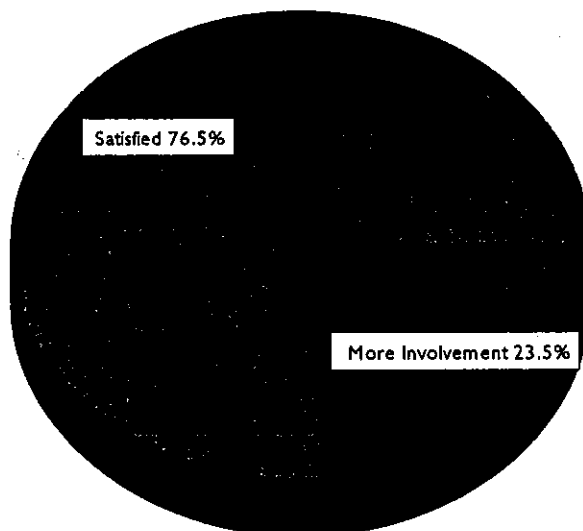


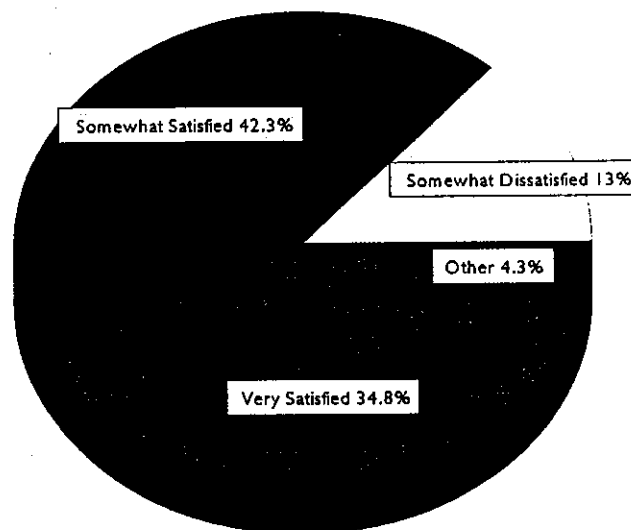
Figure 2  
Participant Satisfaction with Role In Forum Planning





The limited role participants had in planning may have been reflected in the lack of a full endorsement of the agenda that had been developed for the forum (see Figure 3). Only about one in every three (35%) indicated that they were very satisfied with the agenda. Roughly one-half (48%) of the participants were somewhat satisfied with the agenda. A small but significant share of participants (13% or about one in eight persons attending) was somewhat dissatisfied and one other participant was very displeased that s/he had not been consulted.

Figure 3  
Participant Satisfaction with the Agenda Planned for the Forum



While having had a limited role in planning, and not fully satisfied with the agenda for the event, the vast majority of participants felt that their agencies could benefit from their attendance at the forum (see Figure 4). More than half (52%) of participants felt that their agencies could benefit a lot through their participation. Another 44% of the participants indicated that their ASOs could benefit quite a bit. Only 4% of the participants held more modest expectations for the forum.

One factor that may have contributed to these relatively high expectations was the limited familiarity participants had with major topics that were to be covered at the forum (see Figure 5). Almost half of (48%) of participants reported that they were either not at all familiar or only somewhat familiar with program evaluation.

Participants were even less familiar with the other topics. Most participants were not at all or only somewhat familiar with organizational planning methods (58%) and marketing and communications (68%). The vast majority of participants had a limited familiarity with strategies to influence policy (75%), direct market fund raising (83%) and private sector partnerships (92%).

Figure 4  
Extent to Which Participants Felt Their Agencies Could Benefit From Their Participation

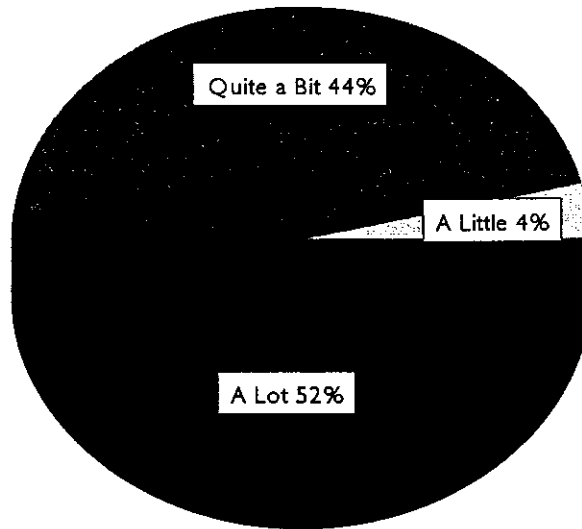
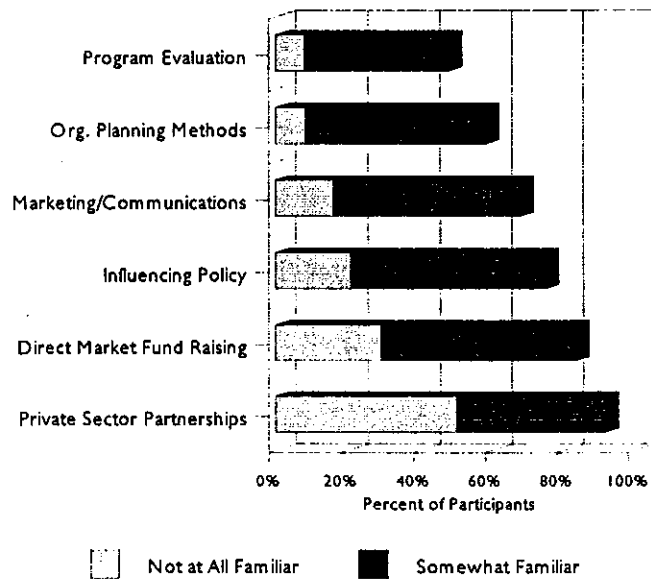


Figure 5  
Participant Pre-Forum Familiarity with Selected Topics Related to Sustainability



### 3.2 Implementation

One noteworthy aspect of the forum that did not appear in the agenda was the animation role played by the regional ACAP Program Consultant. The Program Consultant was very active throughout the forum in animating discussion and interaction among the participants. The nature of this animation role included:

- ⊃ establishing a safe environment in which participants could share information and perspectives;
- ⊃ encouraging open and honest dialogue;
- ⊃ acting as the facilitator for large group sessions; and
- ⊃ providing comment in order to stimulate discussion and debate.

Based on observation, it seems clear that the animation role of the Program Consultant had a major and positive affect on the overall atmosphere at the forum. This atmosphere, in turn, increased the comfort level among many participants and encouraged a willingness to share their experiences and an openness to consider new perspectives.

There were also a number of areas in which the forum diverged from the agenda that had been developed. The following are seen to represent significant departures from what had been expected and may have affected to the overall effectiveness of the forum.

- ⊃ Lack of Full Participation of ASOs - one of the 14 ASOs that had been invited was unable to send a representative to participate in the forum. The number of participants representing many other ASO's were fewer than had been requested by ACAP.
- ⊃ Lack of Consultations with Facilitators - the consultations with small group facilitators that had been planned for Monday night to help them prepare for their roles did not occur.
- ⊃ Increased Time for Initial Group Information Sharing - the one hour that had been scheduled for presentations by ASOs in the large group session on Tuesday morning lasted for over two hours. While all of the groups funded by ACAP had received the agenda prior to the forum which indicated that presentations would be expected by ASOs , few were prepared for their presentations.
- ⊃ Limited Time for Panel Discussion - due to the additional time provided for presentations by the ASOs in the morning, very limited time was left for the panel discussion on strategies for sustainability. As one participant noted, rather than discussing possible strategies, most panel members were only able to provide a very brief preview of their workshops.

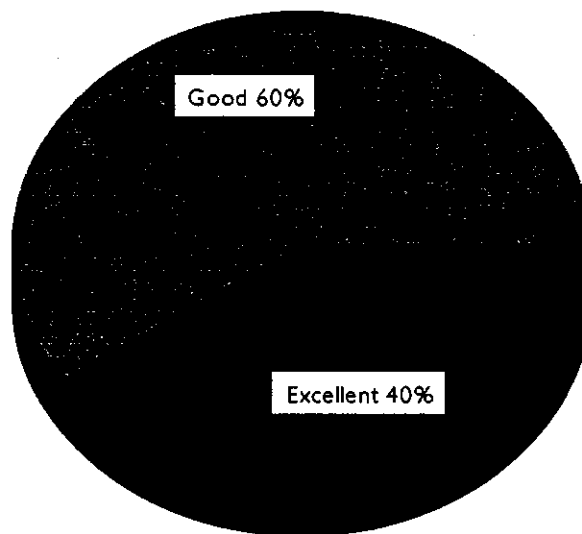
- No Workshop on Program Evaluation - due to limited interest, the workshop on program evaluation was not offered. Several participants with an interest in program evaluation indicated that they hoped to receive assistance in this area after the forum through site visitations by the regional ACAP Program Consultant, the resource person who had been scheduled to facilitate this workshop,
- Limited Participation by Provincial Representatives - the representative from Manitoba Health was unable to attend the forum while the representative from the Province of Saskatchewan was able to attend only the first three days.
- Declining Levels of Participation Toward the End of the Forum - not all participants were able to stay until the end of the forum. Due to previous commitments, three participants had to leave at the end of Day Three and another two participants left on the morning of Day Four.

### 3.3 Outcome Indicators

The questionnaires for participants included a range of questions designed to assess outcomes related to the forum. Responses to these questions suggest that the forum went a long way toward achieving its objectives.

Overall, participants felt that the forum compared very favourably to other workshops and conferences they had attended. Forty percent of the participants rated the forum as excellent relative to other conferences while the remaining 60% rated the forum as good (see Figure 6).

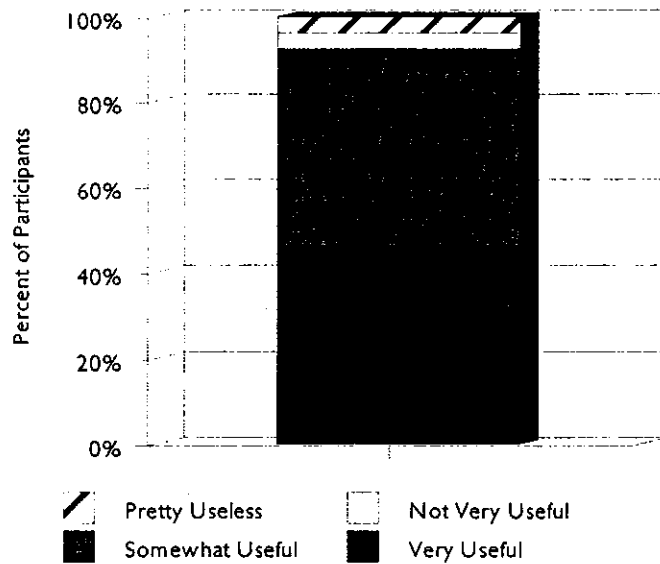
Figure 6  
Participant Rating of Forum Compared to Other Conferences



These comparative ratings are particularly impressive given the high expectations participants had before the forum. Expectations are commonly the basis upon which experience is assessed. These ratings suggest the forum met or surpassed the expectations of most participants.

While the surveys did not contain specific questions on the networking objective of the forum, the chance to share information was consistently cited by participants as one of the highlights of the forum. One of the organized opportunities for information sharing was the small group session on the afternoon of Day Two that provided participants with the opportunity to discuss their ideas on sustainability. Over 90% of participants indicated that this session was either very or somewhat useful in helping them examine the meaning of sustainability (see Figure 7).

Figure 7  
Usefulness of Small Group Sessions  
in Helping Examine the Meaning of Sustainability



The vast majority of participants also felt that the workshops had been useful to them (see Figure 8). Roughly 75% of participants felt that the workshops on marketing and communication and private sector partnerships had been either quite or very useful. More than 80% of the participants who had attended the workshops on direct market fund raising and influencing policy felt that these workshops had been very useful. Not a single participant felt that either of these two workshops were less than quite useful.

Responses from the questionnaires also indicate that the forum provided participants with the opportunity to become more familiar with various aspects of sustainability. More than 80% of participants reported that they had become a lot or quite a bit more aware of issues, strategies and tools related to sustainability (see Figure 9).

Figure 8  
Usefulness of the Workshops

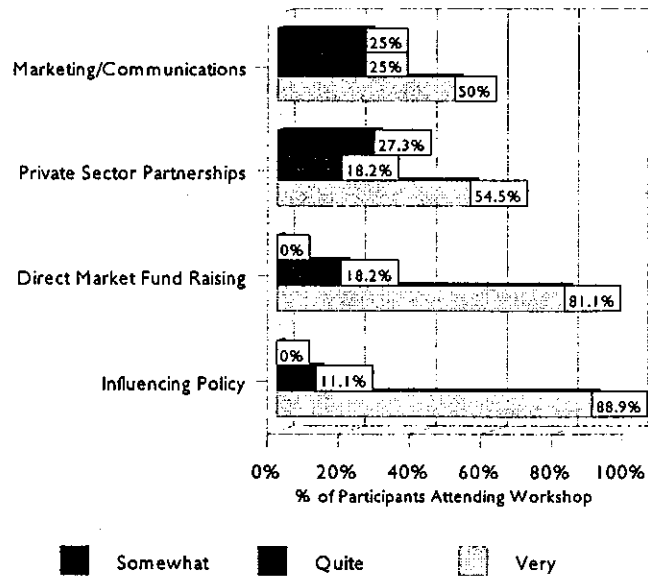
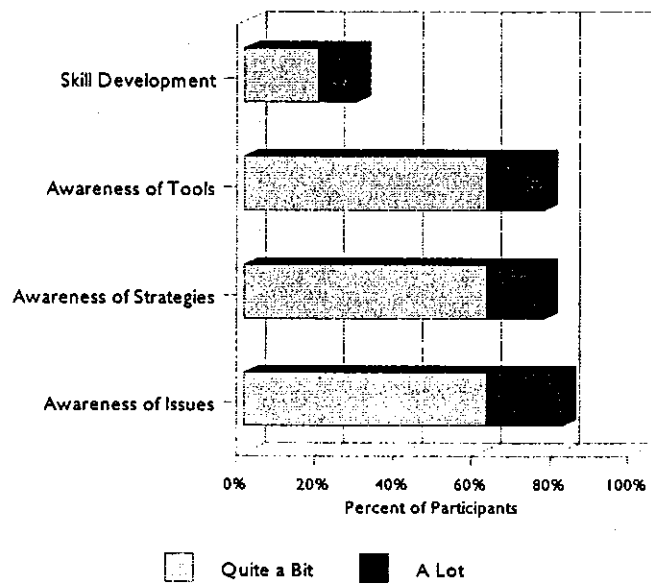
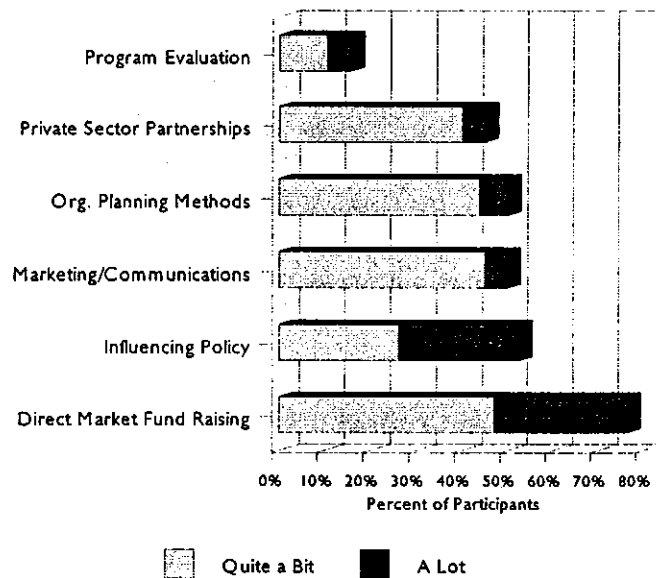


Figure 9  
Extent to Which Forum Increased Awareness and Developed Skills Related to Sustainability



Participation in the forum served to substantially increase levels of familiarity with each of the topics covered in the workshops (see Figure 10). As mentioned earlier, most of the participants reported that they had a very limited familiarity with these topics before the forum. Levels of familiarity reported after the forum had increased markedly. More than 75% of participants reported that they had become quite or a lot more familiar with direct market fund raising. More than 45% of participants reported these substantial increases in their familiarity with influencing policy, marketing and communications, organizational planning methods, and private sector partnerships. Given that the workshop on program evaluation was not offered, it is hardly surprising that few participants reported major increases in familiarity with this topic.

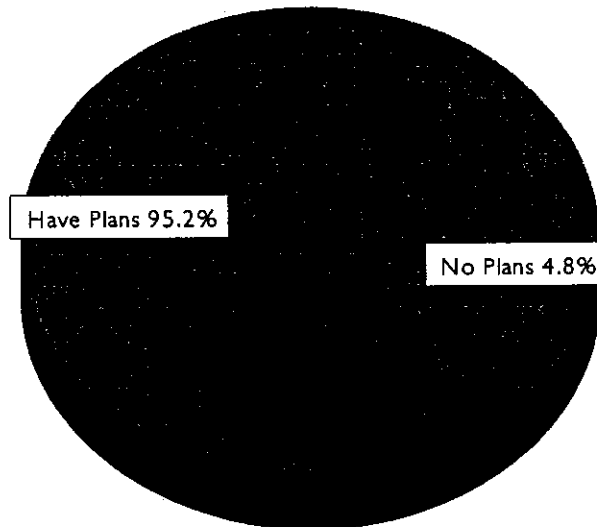
Figure 10  
Extent to Which Workshops Increased Familiarity with Workshop Topics



Skill development was not a formal objective set out for the forum and it appears that the forum had limited impact in this area. Only about 10% of participants felt that the forum had helped them a lot in the development of new skills and only 20% felt that the forum had helped them quite a bit.

Perhaps the strongest indicator of the impact of events at any forum is the extent to which participants come away with tangible ideas to apply in their work at their agencies. Almost all (95%) of the participants at this forum reported that they had already made plans to apply what they had learned (see Figure 11). The only individual who did not have a plan by the end of the forum indicated that s/he expected to develop one in the coming days. A follow-up survey will be distributed in October, 1996 to examine the extent to which these plans were implemented, and if implemented, the extent to which they resulted in benefits for the ASOs.

Figure 11  
Extent to Which Participants Had Plans to  
Apply What They Had Learned By the End of the Forum



More subtle but equally significant outcomes of the forum were shifts in the definitions that participants had for sustainability. Participants were asked to provide a definition of sustainability in the pre-forum questionnaire and in the questionnaire they filled out at the end of the forum. The definitions of sustainability offered by participants before the forum tend to emphasize concerns related to finances and/or merely the ability to continue their current activities. In many cases, the post-forum definitions had broadened to include dimensions related to the development of coalitions, the enhancement of human resources, and enhanced program effectiveness. Table 1 provides a sample of these changes.

Combined with the other findings on the impact of the event, the shifts that occurred in the definition of sustainability suggest the forum went some way in helping participants develop conceptual frameworks for sustainability.



Table I  
Selected Pre- and Post-Forum Definitions of Sustainability

Before Definitions	After Definitions
The ability to offer current programming on a consistent basis. The ability to plan for the future with some security.	To form alliances in order to become part of a larger community and therefore become more effective in providing service.
The services must be the immediate focus of sustainability.	Networking and communicating with each other. Growth and action toward the future is what this forum taught me.
Sustainability means having the resources to maintain the quality of services by our ACAP project.	The focus of sustainability has shifted for me. Rather than always being a money issue, it is now more a question of people and how they fit into the picture of sustainability.
Strategies for continuing programs and keeping the doors open to be able to provide programs.	Sustainability means to improve your organization in all areas so as to work more effectively (fund raising, coalitions, structure, prioritization and communication)
Very simply, sustaining initiatives, programs and services beyond the obvious limitations of contracts and projects.	My understanding has broadened - strengthening of financial sustainability along with internal organizational workings and building relationships with a broad network of groups.

### 3.4 Strengths and Weaknesses

As has been indicated above, the initial forum on sustainability appears to have been very successful. Outcome measures examined indicate that the forum was successful in addressing its objectives, albeit less so in the areas of skill development. Participants rated the forum very highly and returned to their agencies with tangible plans to enhance sustainability.

As with any event, however, the forum had both strengths and weaknesses. The strengths are important to build on in the planning of forums in other regions. The weaknesses are important to address in efforts to enhance the effectiveness of future forums. A summary of key strengths and weaknesses follows.

### 3.4.1 Effective Features of the Forum

- ⊃ Networking Opportunities - participants emphasized the value of the networking opportunities and the chance they had to share information and ideas with other ASOs.
- ⊃ Openness Regarding Unknown Levels of Future Federal Funding - ACAP officials at the forum were open and upfront regarding the unknown levels of federal funding that may be available to ASOs in the future. This approach appears to have provided a context in which participants were able to move beyond criticism of federal policy rather than focussing on this issue throughout the forum.
- ⊃ Popular Workshop Topics - the workshops provided an opportunity for participants to become much more familiar with a range of topics related to sustainability. Participants felt that the workshops were very useful. The familiarity of participants with these topics appears to have increased substantially.
- ⊃ Applicability to Challenges Faced by ASOs - most participants felt that the forum had been very useful to them. Almost all had already developed plans to apply what they had learned by the final day of the forum.
- ⊃ Broadened Understandings - the forum appears to have contributed to substantial shifts in the way that participants view sustainability. For many, the concept of sustainability was broadened from an emphasis on finances, particularly funding from government, to other areas in which ASOs have more direct control.
- ⊃ Increased Interest in Collaboration/Coordination - while ASOs may have left the forum with diverse understandings of the meaning of sustainability, most participants indicated an increased interest in collaborating with other ASOs, other non-profit groups, and other sectors.
- ⊃ Good Mix of Activities - another element of the forum that participants felt was a strength was the mix of workshops and presentations, small and large group discussions, and social activities.
- ⊃ Opportunity for Rejuvenation - many of the participants indicated that the forum had provided them with chance to renew their energies. The location and mix of activities contributed to this. The animation role played by the regional Program Consultant was also a major factor in promoting a sense of sharing among participants.
- ⊃ Kept on Schedule - with the exception of the morning of Day Two, forum activities kept on schedule. This was frequently cited as a positive aspect of the forum by participants.
- ⊃ Great Location - 95% of participants felt that the location for the forum was excellent. It was removed from everyday pressures. The hotel staff were

wonderful as were the facilities. All the participants recommended this type of retreat setting for other regional forums.

- ↳ Great Food - both the quantity and high quality of the food were consistently highlighted by participants. The nutritional and caloric value of the food was consistent with the needs of persons living with AIDS/HIV. The one drawback was the lack of options available to vegetarians.

### 3.4.2 Less Effective Features of the Forum

- ↳ Lack of Focus Early in the Forum - many participants felt that a clearer focus would have been helpful on the first two days of the forum. Many factors appear to have contributed to this lack of focus. These include:
  - a) differences in the ways in which participants understood the term sustainability.
  - b) many ASOs not being aware that they were to present a brief overview of their programs and how their agencies were dealing with issues related to sustainability; and
  - c) the limited direction provided to small group facilitators and the general nature of the questions for discussion.
- ↳ Report Back Session from Small Groups Were of Limited Value to Many - a substantial number of participants felt that the reporting back from small groups was not well organized. Repetition and the lack of focus were the most frequently cited concerns.
- ↳ Inadequate Time for Workshops - most participants felt that the workshops should have been a full rather than a half day in length. Participants felt that resource persons had much more information and ideas to share with them than time allowed. Time constraints may also have been a factor in the limited skill development that was reported by participants.
- ↳ Lack of Time to Deal with Major Issues that Emerged During Forum - a number of important issues were raised over the course of the four days of the forum that related to sustainability but for which time was not available to deal with. These issues include:
  - a) high rates of staff and board burn-out;
  - b) Aboriginal representation and involvement in non-Aboriginal specific ASOs and the relationship of non-Aboriginal specific ASOs with Aboriginal ASOs;
  - c) need for strategies to affect systems changes so that HIV/AIDS services and supports are incorporated into mainstream delivery systems;

- d) need for more effective strategies to deal with homophobia; and
  - e) need to consider new or refined approaches to service design and delivery.
- ↳ Choices Required of Participants - participants were only able to attend two of the five workshops. While many participants indicated that each of the workshops would have been valuable for their agencies, ASOs with fewer than three representatives at the forum were unable to benefit from all the workshops. This was a particular problem for ASOs with a single representative who was able to attend only two of the five workshops.
  - ↳ Lack of Documentation/Handouts - many participants wanted a list of the participants so that they could maintain contact after the forum. While ACAP subsequently mailed contact lists to participants, they were not available at the time of the forum. Participants also indicated that they would have liked to receive handouts from the workshops (only one of the workshops provided handouts at the forum).
  - ↳ Limitations in ASO Attendance - few of the ASOs had a full complement of participants and one ASO did not have representation at the forum. This may have limited the benefits ASOs were able to derive from the forum. The decision to holding the forum on weekdays may have prevented many prospective participants from attending, particularly volunteers. This may have been compounded by the limited notice ASOs received as to the date for the forum and the ASO participation in other AIDS/HIV related conferences preceding or following the ACAP forum..
  - ↳ Lack of Consultation in Planning the Forum - while few participants were dissatisfied with the forum's agenda, many participants would like to have been more involved or more closely consulted in planning efforts.

## **4.0 IMPLICATIONS FOR FUTURE FORUMS**

This report has described a wide range of evaluation findings related to ACAP's first regional forum on sustainability. This concluding section examines what TPG feels are the major implications of these findings for efforts to organize similar forums in other regions.

It is to be noted that TPG's ability to identify and assess implications is limited by two factors. First, TPG has a limited understanding of ACAP's activities in other regions and of the circumstances of and the challenges facing ASOs in these regions. As such, TPG cannot assess the extent to which the initial workshop would have similar results if it was replicated in other regions.

Second, there are a variety of intangibles that affect the success or lack thereof of events like forums. Primary among these are the nature of the relationships that ACAP officials and Regional Consultants have developed with ASOs. These are factors of considerable influence that will need to be examined on a region-by-region basis.

With these limitations noted, the major implications related to the findings of the evaluation have been organized into four sub-sections:

- ⊃ implications related to the overall approach that was used by ACAP;
- ⊃ implications related to content issues;
- ⊃ implications related to the timing issues; and
- ⊃ implications related to logistics and other basic arrangements

### **4.1 Overall Approach**

The overall approach that ACAP took toward the forum proved to be extremely effective. The objectives that were developed for the forum appear to have been realistic albeit somewhat ambitious and were, for the most part, met by the forum. Two specific elements of this approach, one positive and one negative, merit mention.

- ⊃ **Openness Regarding Unknown Levels of Future Federal Funding** - Based on feedback from participants, TPG is of the opinion that the open and direct way the unknown levels of future federal funding was dealt with by ACAP officials played a major role in promoting the trust of ASO representatives. It seems especially important that ACAP's future status be addressed either as part of the preparation for forums or very early in the forums otherwise the focus on sustainability may be side-tracked.
- ⊃ **Consultations with ASOs in Forum Planning** - the limited consultations with ASOs undertaken in planning the initial forum appear to have contributed to a number of difficulties. These include lack of full endorsement of the agenda, less than hoped for levels of participation, lack of focus early in the forum, and the limited preparedness of participants to share information on the way their ASOs were

dealing with sustainability issues. (There are risks involved in expanded consultations. These are discussed below.)

## 4.2 Content Issues

The evaluation findings have three major implications for the content that is best suited to regional forums.

- ⇒ Focus for the Forum - sustainability is a difficult topic around which to develop a focus. Its meaning is based on each individual's experience and the challenges that are seen to lie ahead. Sustainability can also be a controversial topic with ASOs given the unknown levels of federal funding for ASOs in the future.

The extent to which ACAP should try to define sustainability prior to actual forums remains unclear. Sustainability was not clearly defined for the initial forum and while this contributed to the lack of focus early in the forum, it also provided ASOs with a chance to discuss and develop their own definitions. At the same time, the ACAP officials involved in planning the forum did have a working definition that provided direction on what content should be included. Had the ASOs arrived at definitions that conflicted with ACAP on the second day, the forum would probably have not been as successful.

While closer consultations with ASOs in the planning future forums may result in less guess work, these consultations may limit ACAP's ability to define the agenda. It is also possible that no consensus would emerge from these consultations with ASOs.

A more effective balance between control and consultation in forum planning may be provided by discussing a proposed forum with ASOs in more detail during the Program Consultant's site visitations.

- ⇒ Emphasis on Different Levels of Objectives - expectations for the first forum included four different levels of objectives. The first level related to information sharing and networking. The second level related to building awareness regarding issues and concepts. The third level related to increased familiarity with strategies and tools. The fourth area related to skill development.

The expectation that a four-day forum could meet all of these levels of objectives appears to have been ambitious – while the forum appears to have been successful in meeting the first three, few participants reported gains in skill development.

If this assessment is correct, ACAP should consider avenues through which it can support skill development to follow-up on the forum. This could include workshops at the local level to promote skill development in areas identified by ASOs at the

forum. This could also include the support of networking activities among ASOs as a means of promoting skills transfers.

- Topic Areas for Workshops - an observation offered to participants by TPG at the closing session of the forum related to the limited attention that had been given to issue areas that were within the direct control of ASOs. For the most part, workshops were focussed on relationships ASOs could develop with outside stakeholder groups. The only workshops focussed on the internal working of ASOs was on program evaluation, and this was not offered due to lack of demand. There appeared to be general agreement with this observation.

Based on TPG's experience in working with non-profit agencies, the effectiveness of internal workings is as important if not more important to sustainability than external relationships. At the same time, experience suggests that non-profits find it more comfortable to focus on the external issues as these require lesser levels of self-criticism.

As a result, TPG feels that ACAP may need to play a stronger role in encouraging ASOs to deal with internal agency workings as elements that are critical in efforts to address sustainability. Table 2 has been developed for ACAP's consideration as a framework for sustainability that includes both internal and external factors.

Table 2  
Framework of Strategies and Tools to Include in Forums on Sustainability

Strategies	Primary Tools
<b>A. Direct ASO Control</b>	
Programming/Services	Needs Assessment/Program Planning/Program Evaluation
Use of Volunteers	Volunteer Management
Agency Well-Being	Organizational Development/Board Development
Inter-Agency Collaboration	Networking/Coalition Building
<b>B. Considerable ASO Influence</b>	
Public Awareness	Marketing/Communications
Public Profile/Support	Marketing/Communications
Systems Change	Partnerships/Program Design/Coalition Building
Fund Raising	Fund Raising/Private Partnerships
Cross-Sector Collaboration	Networking/Collaboration
<b>C. Some ASO Influence</b>	
Government Policy/Funding	Networking/Coalition Building/Marketing/Communications/Program Evaluation

### 4.3 Timing Issues

The findings of the evaluation of the first regional forum also have three major implications for the timing and scheduling of subsequent forums.

- Availability of Time for Different Types of Activities - subsequent forums should be designed to provide a similar balance between time for working sessions and time for informal networking. The time that was available for networking promoted the sharing of information and the building of relationship among ASOs and also contributed to the extent to which participants enjoyed and were rejuvenated by the forum. These were extremely important to the overall success of the forum.

One adjustment that should be considered is increasing the amount of time available for the workshops. This increase, however, should not be made at the expense of the time for large and small groups discussions or for networking.

- Length of the Forum - in keeping with the need for more time for the workshops, consideration should be given to increasing the length by at least one half-day.
- Weekend Schedule for the Forum - while weekends may not be popular among those with limited personal time, they are the only time that many volunteers employed in full-time jobs outside of ASOs can participate. Given the need to extend the length of the forum, one option that should be considered is scheduling forums from Thursday to Sunday.

### 4.4 Logistics

A final series of implications from the evaluation relate to logistical arrangements for future forums.

- ACAP's Animation Role - forums need to be facilitated. The facilitation/animation role played the local Program Consultant in the initial forum was particularly effective. The roles to be played by ACAP or others to promote the flow and flavour forums in other regions need to be considered carefully.
- Representation by ASOs - The number and nature of ASO representatives expected to participate in forums should be reconsidered. One options that should be considered is to request three representatives from each ASO, with at least one representative being a senior staff person and another being a senior policy volunteer (i.e. board member). This would allow all agencies to benefit equally from participation and would also ensure input from both management and governance levels. Three representatives from each ASO would also provide for a greater breadth of exposure to sustainability issues while decreasing the stretch required of participants from smaller agencies that were only represented by one or two participants.



- ↳ Preparedness of ASOs, Facilitators and Resource Persons - increased efforts are required to ensure that ASOs, facilitators and resource persons are adequately prepared to participate in future forums. Consultations that have been suggested with ASOs should go some way in this regard. Meetings with facilitators and resource persons before forums or prior to their role in forums should not be overlooked in implementation.
- ↳ Retreat Setting for Forums - the retreat setting provided an ideal environment for the initial forum. There was unanimous support for this type of setting for the other regional forums.
- ↳ Representation by Provincial Jurisdictions - provincial participation in forums needs to be secured to provide ASOs with an organized venue in which to examine a full range of funding and programming opportunities. ACAP may need to consider making formal invitation to provincial health authorities well in advance of forums.
- ↳ Notice of the Forum Given to ASOs - notice should be given to ASOs of the dates for a forum well before the event. Two months notice would seem to provide a reasonable target for future forums.
- ↳ Available Documentation - increased efforts need to be made to provide participants with printed materials. These should include but not be limited to a list of forum participants and resource persons; and handouts from each of the workshops (even with three participants, ASOs will not be able to attend each workshop).
- ↳ Menu Options - menus available to participants should be expanded to include options appropriate to persons with a range of dietary/nutritional needs or preferences. Special attention will be needed to continue to address the nutritional needs of persons living with AIDS/HIV.



## **APPENDICES**

Appendix One	Forum Agenda
Appendix Two	Pre-Forum Questionnaire for Participants
Appendix Three	Second Day Questionnaire for Participants
Appendix Four	Third Day Questionnaire for Participants
Appendix Five	Final Day Questionnaire for Participants
Appendix Six	Pre-Forum Questionnaire for Resource Persons
Appendix Seven	Final Day Questionnaire for Resource Persons



**"TOWARDS A SUSTAINABLE FUTURE"**  
**A Regional Forum For ACAP Sponsored Projects**

June 10 - 13, 1996  
The Russell Inn - Russell, Manitoba

**GOAL:** To encourage ACAP funded community based AIDS organizations to develop strategies for sustainability.

**OBJECTIVES:**

- Provide an opportunity for Regional ACAP project sponsors to network and share information;
- Provide information relating to project sustainability to forum participants;
- Develop a framework for project sustainability that is relevant to community based AIDS organizations;
- Evaluate the forum proceedings as a template for national action.

**FORUM AGENDA**

**DAY ONE: Monday, June 10, 1996**

4:30 PM... Arrival at Russell Inn

6:00 PM... Dinner Meeting  
i) Greetings/Introductions/Housekeeping  
ii) Dinner  
iii) Evaluator's introductory remarks  
iv) Workshop and Small Groups Assignments  
(Yellowhead Conference Room)

8:30 PM... Small Group Leaders Meeting With J. Stinson  
(Asessippi board Room)

**DAY TWO: Tuesday, June 11, 1996**  
(all activities Yellowhead Conference Room unless noted)

9:00 AM... Welcome/Check-in/Participation Protocols

9:15 AM... Agenda Review/Goal-Objectives Review

9:30 AM... Community Group Information Sharing:  
"Where do you think your group is in relation to sustainability?" - comments from a rep for each ACAP project sponsor

DAY THREE: Wednesday, June 12, 1996

- 8:30 AM... Buffet Breakfast and Check - in  
(Yellowhead Room)
- 9:30 AM... Workshops (break @ 10:45 - 11:00 AM)
- a) "Marketing Your Organization:  
Building a Communications Plan"  
Facilitator: Val McPherson  
(Yellowhead Room)
  - b) "What's In It For Me?:  
Building Private Sector Partnerships"  
Facilitator: B. Michalski, DSR Communications  
(Asessippi Room)
  - c) "Influencing Policy and Reaching Decision  
Makers"  
Facilitator: J. Dodds, SK AIDS Network  
(Route 83 Room)
  - d) "The Path to Self Sufficiency:  
Target Market Fundraising"  
Facilitator: L. Hunter, Heart & Stroke MB.  
(Indoor Lounge Area)
  - e) "Let's Talk About Evaluation"  
Facilitator: J. Stinson, HPPB, Health Canada  
(Premiere Suite)
- NOON... Lunch (Yellowhead Room)
- 1:15 PM... Repeat Workshops (break @ 2:30 - 2:45 PM)
- 4:00 PM... Adjourn
- 6:00 PM... BBQ (Location @ Hotel but TBA)
- 8:00 PM... Entertainment and cash bar  
(Yellowhead Room)



**c. Organizational Planning Methods**

<i>Not at all Familiar</i>	<i>Somewhat Familiar</i>	<i>Quite Familiar</i>	<i>Extremely Familiar</i>
1	2	3	4

5. Beyond having agreed to serve as a resource person, were you involved in other ways in helping to plan the workshop? (please check the most appropriate response)

- No, not at All
- Yes. I was asked for my ideas for the workshop
- Yes. I was involved in making decisions about the workshop
- Other, please specify \_\_\_\_\_

6. Which of the following most closely reflects your level of satisfaction with the role you played in planning the workshop? (please check the most appropriate response)

- I am generally satisfied with the degree to which I was involved in planning
- I would like to have had a greater involvement in planning
- I would like to have been less involved in planning

**Please fax back your completed questionnaire  
by no later than Thursday, June 6th, 1996 to (204) 477-8148.**

**Thank You for Your Help**



Resource Person's Name \_\_\_\_\_

## FINAL DAY RESOURCE PERSON'S QUESTIONNAIRE

The following questionnaire was developed for Resource Persons to complete at the end the forum. Questions have been organized into three sections that ask for your opinions on parts of the forum as well as on the forum overall. As I will be working under tight timelines to prepare a report on the event, I would ask that you complete and return the questionnaire to me before you leave and make your way home.

Thank you once again for your assistance.

Patrick Falconer

### PART I: Tuesday's Morning Panel and Afternoon Small Group Session

1. Do you feel that Tuesday morning panel was an useful way to introduce participants to a range of views and ideas related to sustainability? (please circle the most appropriate response)

Pretty useless	Not very useful	Somewhat useful	Very useful
1	2	3	4

Comments:

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2. To what extent do you feel that the small group discussion was useful in helping participant's examine the meaning of sustainability relative to their own agencies? (please circle the most appropriate response)

Pretty useless	Not very useful	Somewhat useful	Very useful
1	2	3	4

Comments:

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3. Do you have any ideas or suggestions for how the panel or the small group sessions could be improved for forums with ACAP funded agencies/projects in other part of of the country?

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PART 2: Wednesday's Workshops

4. In the initial questionnaire sent to you before the forum, we asked you to identify what themes you would be focusing on in your workshop. Do you feel that you were able to get these messages across to the participants? (please circle to most appropriate response)

Not very  
effectively  
1

Somewhat  
effectively  
2

Fairly  
effectively  
3

Very  
effectively  
4

5. What were some of the things that worked particularly well in your workshop?

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6. Based on your experience over the last few days, how might you modify your workshop to make it more effective for this target audience?

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PART 3: The Overall Forum

7. How would you rate the location for this conference? (please circle the most appropriate response)

Poor  
1

Fair  
2

Good  
3

Excellent  
4

8. Do you feel that a "retreat" facility like the Russell Inn (a place removed from other every day pressures) is the most effective place for a forum like this?

Yes  
 No (what alternative facilities would you suggest \_\_\_\_\_)

9. How did you find the mix of time for presentations, group discussions and social activities that were part of the forum? (please check the most appropriate response)

	Too Little Time	About Right	Too Much Time
Time for Presentations	_____	_____	_____
Time for Group Discussions	_____	_____	_____
Time for Social Activities	_____	_____	_____

10. Based on your experience at other conferences and workshops, how would you rate this forum? (please circle the most appropriate response)

Poor	Fair	Good	Excellent
1	2	3	4

11. What were the three best things about the forum?

- i. \_\_\_\_\_
- ii. \_\_\_\_\_
- iii. \_\_\_\_\_

12. What were the three worst thing about the forum?

- i. \_\_\_\_\_
- ii. \_\_\_\_\_
- iii. \_\_\_\_\_

13. What things could be done to improve this type of forum for ACAP projects in other parts of the country?

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

14. In the initial questionnaire sent to you before the forum, we asked also you to define what "sustainability" meant to you in the context of the challenges that are faced by not-for-profit agencies. In one or two sentences, please define what sustainability means to you after the forum?

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15. Please feel free to add any other comments you feel might be useful in planning future workshops on sustainability.

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Please complete and return this questionnaire to  
Patrick Falconer before you leave and make your way home from the forum

Thank You

PARTICIPANT'S NAME \_\_\_\_\_  
NAME OF AGENCY/PROJECT \_\_\_\_\_

## PRE-FORUM QUESTIONNAIRE

1. The upcoming workshop has been planned to address issues related to "sustainability". In one or two sentences, please define what "sustainability" means to you in the context of your work with an ACAP-funded agency/project.

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2. Given this definition, do you feel that your agency can benefit from having representatives attend this workshop on "sustainability"? (please circle the most appropriate response)

Not at All	Benefit a Little	Benefit Quite a Bit	Benefit a Lot
1	2	3	4

3. What are the three most important things that you hope to gain through your participation at the workshop?

i. \_\_\_\_\_  
ii. \_\_\_\_\_  
iii. \_\_\_\_\_

4. Given your past experience, how familiar would you say that you are with the following: (please circle the most appropriate response)

**a. Marketing/Communications**

<i>Not at all Familiar</i>	<i>Somewhat Familiar</i>	<i>Quite Familiar</i>	<i>Extremely Familiar</i>
1	2	3	4

**b. Program Evaluation**

<i>Not at all Familiar</i>	<i>Somewhat Familiar</i>	<i>Quite Familiar</i>	<i>Extremely Familiar</i>
1	2	3	4

**c. Private Sector Partnerships**

<i>Not at all Familiar</i>	<i>Somewhat Familiar</i>	<i>Quite Familiar</i>	<i>Extremely Familiar</i>
1	2	3	4

**d. Direct Market Fund Raising**

<i>Not at all Familiar</i>	<i>Somewhat Familiar</i>	<i>Quite Familiar</i>	<i>Extremely Familiar</i>
1	2	3	4

**e. Lobbying of Decision-Makers**

<i>Not at all Familiar</i>	<i>Somewhat Familiar</i>	<i>Quite Familiar</i>	<i>Extremely Familiar</i>
1	2	3	4

**f. Organizational Planning Methods**

<i>Not at all Familiar</i>	<i>Somewhat Familiar</i>	<i>Quite Familiar</i>	<i>Extremely Familiar</i>
1	2	3	4

5. Were you involved in helping to plan the workshop? (please check the most appropriate response)

- No, not at All
- Yes, I was asked for my ideas for the workshop
- Yes, I was involved in making decisions about the workshop
- Other, please specify \_\_\_\_\_

6. Which of the following most closely reflects your level of satisfaction with the role you played in planning the workshop? (please check the most appropriate response)

- I am generally satisfied with the degree to which I was involved in planning
- I would like to have had a greater involvement in planning
- I would like to have been less involved in planning

**Please fax back your completed questionnaire  
by no later than Thursday, June 6th, 1996 to (204) 477-8148.**

**Thank You for Your Help**

Participant's Name \_\_\_\_\_  
Name of Agency/Project \_\_\_\_\_

DAY TWO  
PARTICIPANT'S QUESTIONNAIRE

The following questionnaire was developed for participants to complete after the end of the second day of the "Towards a Sustainable Future" forum. Questions have been organized into four sections that ask for your opinions on different parts of the day's agenda as well as on the day overall. I would ask that you return completed questionnaires to me at the buffet breakfast Wednesday morning.

Thank you for your assistance.

Patrick Falconer

PART 1: Forum Structure/Agenda

1. How satisfied are you with the agenda for the forum that was agreed upon this morning (please circle the most appropriate response)

Very Dissatisfied 1	Somewhat Dissatisfied 2	Somewhat Satisfied 3	Very Satisfied 4
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2. Please briefly describe any changes that you feel should have been incorporated in the agenda that were not?

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PART 2: Morning Panel

3. How would you rate the panel session this morning in the following areas? (please circle the most appropriate response)

a. Newness of Information Presented

Already knew most of the info. 1	Already knew much of the info. 2	Much of the info was new to me 3	Almost all the info was new to me 4
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b. Relevance of the Panel Session to your Agency

Of very little of it was relevant 1	Parts of the session were relevant 2	Much of the session was relevant 3	Almost all of the session was relevant 4
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4. Please describe the information or perspectives that were raised through the Panel that you feel were most helpful for you.

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5. Please describe any information or perspective that you feel would have been useful but which were not raised through the Panel.

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PART 3: Afternoon Small Group

6. In which small group did you participate ? (please circle the letter corresponding with your group)

Group      A                      B                      C                      D

7. To what extent was the group discussion useful in helping you examine the meaning of sustainability for your agency? (please circle the most appropriate response)

Pretty useless 1	Not very useful 2	Somewhat useful 3	Very useful 4
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8. How effective was your group leader in facilitating discussion? (please circle the most appropriate response)

Not at all effective 1	Somewhat effective 2	Fairly effective 3	Very effective 4
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9. Please describe any ways you feel that the small group discussion session could be improved.

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PART 4: Overall Comments

10. What was best thing about the second day of the forum?

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11. What was worst thing about the second day of the forum?

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12. Please feel free to share any other comments you have about the forum so far.

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Please return your completed questionnaire to  
Patrick Falconer at breakfast on Wednesday morning

Thank you



Participant's Name \_\_\_\_\_  
Name of Agency/Project \_\_\_\_\_

## DAY THREE PARTICIPANT'S QUESTIONNAIRE

The following questionnaire was developed for participants to complete at the end of the third day of the forum. Questions have been organized into three sections that ask for your opinions on the morning and afternoon workshops as well as on the day overall. I would ask that you complete the questionnaire directly after your afternoon workshop and return it to me at the BBQ at 6 pm.

Thank you once again for your assistance.

Patrick Falconer

### PART I: Morning Workshop

1. Which workshop did you participate in during the AM session? (please check workshop name)

- |   |  |
|---|--|
| <input type="checkbox"/> a) Marketing Your Organization                 | <input type="checkbox"/> b) What's in It for Me?         |
| <input type="checkbox"/> c) Influencing Policy/Reaching Decision Makers | <input type="checkbox"/> d) The Path to Self-Sufficiency |
| <input type="checkbox"/> f) Let's Talk Evaluation                       |  |

2. How would you rate the workshop in the following areas? (please circle the most appropriate response)

a. Newness of Information Presented

- |  |  |  |   |
|--|--|--|---|
| Already knew<br>most of the info.<br>1 | Already knew<br>much of the info.<br>2 | Much of the info<br>was new to me<br>3 | Almost all the<br>info was new to me<br>4 |
|--|--|--|---|

b. Usefulness of Workshop for You/Your Agency

- |                           |                         |                      |                     |
|---------------------------|-------------------------|----------------------|---------------------|
| Not at all<br>useful<br>1 | Somewhat<br>useful<br>2 | Quite<br>useful<br>3 | Very<br>useful<br>4 |
|---------------------------|-------------------------|----------------------|---------------------|

3. How would you rate the facilitator in the following areas? (please circle the most appropriate response)

- |  |           |   |   |                |
|--|-----------|---|---|----------------|
|  | Poor<br>1 | 2 | 3 | Excellent<br>4 |
|--|-----------|---|---|----------------|
- a. Presentation skills

	Poor			Excellent
b. Knowledge of subject area	1	2	3	4
	Poor			Excellent
c. Facilitation skills	1	2	3	4

4. What percentage of the workshop was made up of a presentation and what percentage was group discussion? How would you have liked to have seen the workshop divided between presentation time and discussion time? (please fill in the blanks with percentages)

	the workshop was	it should have
Time for the presentation	___%	___%
Time for group discussion	___%	___%
Other	___%	___%
(please specify _____)		

5. What information did you find to be most useful?

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6. Please describe any information that you feel would have been useful but which was not raised in the workshop

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7. Please describe any ways you feel that the workshop session could be improved.

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### PART 2: Afternoon Workshop

8. Which workshop did you participate in during the PM session? (please check workshop name)

- |   |  |
|---|--|
| <input type="checkbox"/> a) Marketing Your Organization                 | <input type="checkbox"/> b) What's in It for Me?         |
| <input type="checkbox"/> c) Influencing Policy/Reaching Decision Makers | <input type="checkbox"/> d) The Path to Self-Sufficiency |
| <input type="checkbox"/> f) Let's Talk Evaluation                       |  |

9. How would you rate the workshop in the following areas? (please circle the most appropriate response)

a. Newness of Information Presented

Already knew most of the info.	Already knew much of the info.	Much of the info was new to me	Almost all the info was new to me
1	2	3	4

b. Usefulness of Workshop for You/Your Agency

Not at all useful	Somewhat useful	Quite useful	Very useful
1	2	3	4

10. How would you rate the facilitator in the following areas? (please circle the most appropriate response)

	Poor			Excellent
a. Presentation skills	1	2	3	4
b. Knowledge of subject area	1	2	3	4
c. Facilitation skills	1	2	3	4

11. What percentage of the workshop was made up of a presentation and what percentage was group discussion? How would you have liked to have seen the workshop divided between presentation time and discussion time? (please fill in the blanks with percentages)

	the workshop was	it should have
Time for the presentation	___%	___%
Time for group discussion	___%	___%
Other	___%	___%
(please specify _____)		

12. What information did you find to be most useful to you?

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13. Please describe any information that you feel would have been useful but which was not raised in the workshop

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14. Please describe any ways you feel that the workshop session could be improved.

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PART 3: Overall Issues

15. What was best thing about the third day of the forum?

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16. What was worst thing about the third day of the forum?

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17. We will be having a large group discussion on Thursday morning to talk about the forum and ways that it can be made more effective when similar events are planned for ACAP projects in other parts of the country. What things that do you think we should talk about?

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Please complete the questionnaire directly after your afternoon workshop and return it to Patrick Falconer at the BBQ at 6 pm.

Participant's Name \_\_\_\_\_  
Name of Agency/Project \_\_\_\_\_

## FINAL DAY PARTICIPANT'S QUESTIONNAIRE

The following questionnaire was developed for participants to fill out at the end of the forum. As I will be working under tight time lines to prepare a report on the forum, I would ask that you complete and return the questionnaire to me before you leave and make your way home.

Thank you one final time for your assistance.

Patrick Falconer

### FINAL QUESTIONS

1. How would you rate the location for this conference? (please circle the most appropriate response)

Poor	Fair	Good	Excellent
1	2	3	4

2. Do you feel that a "retreat" facility like the Russell Inn (a place removed from other every day pressures) is the most effective place for a forum like this?

Yes  
 No (what alternative facilities would you suggest \_\_\_\_\_)

3. How did you find the mix of time for presentations, group discussions and social activities that were part of the forum? (please check the most appropriate response)

	Too Little Time	About Right	Too Much Time
Time for Presentations	_____	_____	_____
Time for Group Discussions	_____	_____	_____
Time for Social Activities	_____	_____	_____

4. To what extent do you feel that the overall forum helped you to: (please circle the most appropriate response)

a. Increase your awareness of issues related to sustainability?

Not at all	Somewhat	Quite a bit	A lot
1	2	3	4

b. Become more aware of strategies that can be used for sustainability?

Not at all	Somewhat	Quite a bit	A lot
1	2	3	4

c. Become more familiar with tools that can be used in efforts to achieve sustainability?

Not at all	Somewhat	Quite a bit	A lot
1	2	3	4

d. Develop skills related to the strategies and tools?

Not at all	Somewhat	Quite a bit	A lot
1	2	3	4

5. Do you feel that your participation in the forum helped you to increase your familiarity with the following: (please circle the most appropriate response)

a. Increase in Familiarity with Marketing/Communications?

Not at all	Somewhat	Quite a bit	A lot
1	2	3	4

b. Increase in Familiarity Program Evaluation?

Not at all	Somewhat	Quite a bit	A lot
1	2	3	4

c. Increase in Familiarity Private Sector Partnerships?

Not at all	Somewhat	Quite a bit	A lot
1	2	3	4

d. Increase in Familiarity Direct Market Fund Raising?

Not at all	Somewhat	Quite a bit	A lot
1	2	3	4

e. Increase in Familiarity Lobbying of Decision Makers?

Not at all	Somewhat	Quite a bit	A lot
1	2	3	4

f. Increase in Familiarity Organizational Planning Methods?

Not at all	Somewhat	Quite a bit	A lot
1	2	3	4



6. Do you have any plans as to how you will use your experience at the forum with your agency/project upon your return? (please check the most appropriate response)

No

Yes, if yes, tell us a bit about your plans

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7. Based on your experience at other conferences and workshops, how would you rate this forum? (please circle the most appropriate response)

Poor  
1

Fair  
2

Good  
3

Excellent  
4

8. What area(s) related to sustainability would you like to have had more time to deal time to deal with during the conference?

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9. Other than filling out evaluation forms, what would you have rather spent less time on during the conference?

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10. What things could be done to improve this type of forum for ACAP projects in other parts of the country?

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11. In the initial questionnaire sent to you before the forum, we asked you to define what "sustainability" meant to you in the context of your work with an ACAP-funded agency/project. In one or two sentences, please define what sustainability means to you after the forum?

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12. Please feel free to add any other comments you feel might be useful in planning future workshops on sustainability.

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Please complete and return this questionnaire to  
Patrick Falconer before you leave and make your way home from the forum

One Final Thank You