

*People • Partnerships • Knowledge*

## Evaluation Directorate



*July 2007*

# Formative Evaluation of the Community Inclusion Initiative

*Final Report*  
**July 2007**



# ***Formative Evaluation of the Community Inclusion Initiative***

**Final Report**

***Evaluation Directorate  
Strategic Policy and Research Branch  
Human Resources and Social Development Canada***

***July 2007***

**SP-AH-692-07-07E  
(également disponible en français)**

Paper

ISBN: 978-0-662-47234-6

Cat. No.: HS28-133/2007E

PDF

ISBN: 978-0-662-47235-3

Cat. No.: HS28-133/2007E-PDF

# ***Acknowledgements***

*Evaluation Directorate would like to thank all who contributed to conducting the formative evaluation of the Community Inclusion Initiative.*



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# *Glossary of Acronyms*

ACL	Association for Community Living
AACL	Alberta Association for Community Living
CACL	Canadian Association for Community Living
CII	Community Inclusion Initiative
CLO	Community Living Ontario
ED	Evaluation Directorate
HRD	Human Resources Development Canada
HRSDC	Human Resources and Social Development
NGO	Non-governmental organization
ODI	Office for Disability Issues
PF	People First
PFC	People First of Canada
PAR	Participatory Action Research
PFM	People First of Manitoba
PFNS	People First of Nova Scotia
PFS	People First of Saskatchewan
P/T	Provincial/Territorial
SACL	Saskatchewan Association for Community Living
SDC	Social Development Canada
SDPP	Social Development Partnerships Program



# *Executive Summary*

This report provides a summary of the formative evaluation of the Community Inclusion Initiative (CII). The CII is managed by the Office for Disability Issues (ODI), which is part of Human Resources and Social Development (HRSDC).

The CII was launched in 1997 as a national community development initiative to promote the economic inclusion, full participation and citizenship of Canadians who are intellectually disabled (referred to as people with disabilities in this report).

The goal of the CII is:

to assist communities to develop the capacities they require to successfully include people with intellectual disabilities in ways that promote their roles as full citizens.

The Community Inclusion Initiative supports activities and projects related to the strengthening of supports for individuals and families, including efforts towards facilitating and enriching personal relationships, employment and enabling citizenship; and the development of communities which can support individuals and their families including changes to community structures, influencing the associational life of communities and revising community systems, laws and policies.

The federal government allocated approximately \$3 million to the CII per year over the period from 1997/98 to 2004-2005. These funds were distributed through contribution agreements under the umbrella of the Social Development Partnerships Program (SDPP) to two non-government organizations: the Canadian Association for Community Living (CACL), and People First Canada (PFC). Both NGOs have a national body, provincial/territorial counterparts and a large number of community-based chapters.

Projects were approved for funding based on proposal calls or other selection processes undertaken by the NGOs within each province/territory. At the start of the evaluation (2004), more than 400 projects had been approved.

## **Evaluation Scope and Methodology**

The formative evaluation of the CII was initiated (in 2004) to provide the ODI with the necessary information to make well-informed decisions regarding possible future directions for the CII. A second purpose was to assist the ODI in taking steps to enhance the evaluability of the CII. Therefore, the formative evaluation was focused on the following four issues:

- whether the CII's rationale, goal and key activities continue to be relevant;
- the extent to which the CII's terms, targets and objectives are clear and measurable;
- strengths and weaknesses of the CII's design, delivery and implementation; and
- a preliminary look at whether the CII is achieving its intended results and impacts.

The evaluation examined the period from 1997 to 2005, and particularly fiscal years 2003-2004 and 2004-2005. Six main sources of information were used: a review of documents and literature; a project census of CII projects conducted for the fiscal years 2003-2004 and 2004-2005 (n=141 for the Association for Community Living (ACL), and n=22 for People First (PF)); 9 case studies (consisting of 3 provincial ACL NGOs, 3 provincial PF NGOs, and 3 national projects); key informant interviews (with 4 ODI officials, 5 ACL representatives, 6 PF representatives, and 5 provincial/territorial representatives); a stakeholder survey (n=255); and interviews of people with disabilities (n=100).

Each evaluation issue was examined using multiple lines of evidence. At the same time, certain limitations and cautions should be noted.

- Most of the sources of information either manage the CII (ODI officials) or benefit from the CII (contribution agreement holders, or stakeholders involved in funded projects). Given these circumstances, particular care was taken to ensure that readers could understand the source and context of opinions/information.
- Several factors limited the types of input that could be drawn from the document review. In particular, there was often a lack of quantitative detail.
- For several reasons, the findings from the stakeholder survey should be considered to be highly exploratory. For example, the survey's sample is small in relation to the large numbers reported to be reached by the CII.
- For several reasons, the findings from the interviews of people with disabilities should be interpreted with some caution. For example, the interviewees are not a representative sample of all CII participants.
- While a document review was done for the Initiative as a whole, project specific file reviews were not and this limited the evaluator's ability to assess administrative costs as a proportion of total expenditures.

## Main Findings

### a) Are the CII's rationale, goal and key activities still relevant?

*The CII has evolved since 1997, continuing to be relevant and to address real inclusion needs.*

- Some aspects of the CII have evolved since 1997. In particular, the project funding period was increased from one year to three years. The CII's steering committee roles were devolved to the provincial/territorial level as the need for a national steering body diminished. As well, the CII has evolved towards certain themes and making systemic changes (for example in the areas of child welfare and education).
- The evidence (provided by the document review, key informants, and interviews of people with disabilities) indicated that the CII continued to be relevant from the perspective of federal and provincial governments. The evidence also indicated that the CII continued to be relevant from the perspective of SDPP and NGOs objectives. For example, most (89%) of the surveyed stakeholders rated the CII as "very important" to achieving inclusion.
- Evidence (provided by the document review, key informants, case study analysis, stakeholder survey, and interviews of people with disabilities) indicated that the CII addresses real inclusion needs and priorities of people with disabilities.

### b) Are the CII's terms, targets and objectives clear and measurable?

The evidence indicates that *most key stakeholders probably had a good understanding of the CII, but there is less understanding of the CII at the regional and local levels and among people with disabilities.*

*A variety of ways are being used to define key terms such as "organizational capacity", "community capacity" and "inclusion".* Although this flexibility in language may aid/allow CII projects to achieve their objectives, it can add some confusion and complexity when communicating with partners and when attempting to assess/report on results.

Evidence (provided by the document review, project census and case studies) indicates that *the CII's targets are not well-defined in terms of reach and expected results.*

*Better processes are needed to facilitate reporting and data collection, and to provide consistent data that are clearly linked to achievements/progress based on objectives.*

**c) What are the strengths and weaknesses of the CII's design, delivery and implementation?**

*A number of strengths or advantages were identified.*

- The CII delivery model was identified as having certain advantages in mobilizing communities and partnerships. For example, the delivery model is able to foster partnerships, its flexibility allows for the identification of needs at the local level, and its three-year funding period for projects enables project planning.
- The evidence indicated that the selection processes used by the NGOs have led to project funding decisions that reflect CII priorities.
- The design and delivery of CII-funded projects/activities promote self-determination by involving people with disabilities in these processes, and it might be possible to do even more in this area.
- Other strengths include the funding of types of activities that contributed effectively to strengthening community and organizational capacity, and the sharing of lessons learned and new knowledge about ways to increase inclusion (as discussed under issue 4, below).

*A number of weakness or disadvantages were identified.*

- Reporting requirements can be a burden for NGOs. At the same time, however, there is always a need to track the proportion of the CII budget that goes to administration.
- Some communications challenges were cited (e.g., communicating across various groups).
- More could be done to increase the representation of members of Aboriginal and ethno-cultural minority communities among participants involved in the design and delivery of CII activities.
- More could be done to make further use of self-evaluation and lessons-learned processes (as discussed under issue 4, below).

Regarding alternative approaches, *views were mixed on whether an alternative delivery model would be better.*

**d) Is the CII achieving its intended results and impacts?**

Data from the project census indicated that 142 CII projects during 2003-2004 and 2004-2005 were estimated to have directly reached more than 60,000 individuals. The evidence suggested that the strong local structures of the ACL and PF have helped to directly reach people. In addition, information sharing through CACL's *Participatory Action Research (PAR)* project and through PF's *Project Learning* was an important avenue for reaching people directly and indirectly. The evidence also suggested that funding was one of the factors influencing reach. Other identified factors included levels of communication and formal organization.



*The evaluation took a preliminary look at results and outcomes in three main areas.*

- ***The evidence suggested that the CII has been able to mobilize communities and partnerships.*** Evidence provided by the stakeholder survey indicated that the CII created new partnerships, particularly in the areas of social services and education. CII activities identified as most effective in strengthening community and organizational capacity were activities that helped to build relationships and networks, activities that provided a forum for community learning, and activities that provided educational/learning opportunities for people with disabilities and other stakeholders.
- ***The evidence indicated that the CII has contributed to the process of determining and sharing lessons learned and new knowledge about efforts to increase inclusion.*** In particular, *PAR* and *Project Learning* have contributed to a better understanding of what works well and what does not work well. At the same time, however, a number of ways were identified to make more effective use of self-evaluation and new knowledge processes – such as identifying ways to increase the sharing and awareness of lessons learned.
- ***The evidence suggested that CII involvement has facilitated/increased inclusion.*** For example, a range of results were identified in the case of participants with disabilities, including self-growth, increased social/community connections, increased access to community services and improved quality of life. Most key informants and over three-quarters (77%) of respondents to the stakeholder survey felt that CII has been successful in facilitating community inclusion. Projects in the areas of leadership, social networks/supports and self-advocacy appear to have been the most effective.

***Although robust measures of impacts are not available, evidence from the formative evaluation suggested that the CII has resulted in changes in inclusion that would not have occurred without the CII.*** For example, the key informants felt that the CII was successful or very successful in adding to existing efforts. Many projects used CII funding to leverage additional funding and/or in-kind support (such as time or expertise) from other sources. The project census indicated that 56% of projects in 2003-2004 and 2004-2005 leveraged in-kind contributions, 22% leveraged additional funding from other NGOs, and 19% leveraged additional funding from provincial/ territorial governments.

***There is a high level of satisfaction with the CII.*** For example, most (81%) of the surveyed stakeholders were either “very satisfied” (47%) or “satisfied” (34%) with the CII. The interviews of people with disabilities indicated that 78% of the interviewees said they would do their CII activities again without reservation.

***Although robust measures of cost-effectiveness are not available, evidence from the formative evaluation suggested that the CII is providing value for money.*** For example, many key informants (8 of 19) as well as stakeholders interviewed as part of the case studies emphasized that the CII was achieving much with modest amounts of money. Several key informants identified partnerships, the use of volunteers, and the ability to leverage in-kind contributions as greatly aiding the CII’s cost-effectiveness.

## **Areas Identified for Review/Improvement**

- There is a need to develop ways to facilitate and improve data collection and information reporting.
- The evaluation indicated that it would be useful to consider/identify ways to:
  - increase understanding of the CII at the regional and local levels;
  - add to the involvement of people with disabilities, and increase the representation of members of Aboriginal and ethno-cultural minority communities in the design and delivery of CII funded activities; and
  - make further use of self-evaluation and lessons-learned processes.

# *Management Response*

We concur with the overall conclusions of the Report. The Report confirms that the rationale, goal and key activities of CII continue to be relevant and that the projects and activities conducted under the CII are reflective of its mandate, goals and activities. The Report also confirms that for the period that was reviewed, the Initiative was deemed to be successful.

The Report does identify areas that can be improved and the following will speak to the changes that have been implemented since the formative evaluation was conducted.

## **The Report indicates a need to develop ways to facilitate and improve data collection and information reporting.**

It is agreed that the data collection methodology, information reporting, and CII targets were not well-defined in terms of reach and expected results. Beginning in 2005-2006, CII projects were administered through the renewed Social Development Partnerships Program (SDPP) terms and conditions. A results based management framework was introduced at that time. With clearer objectives, activities, expected results and a dissemination strategy, groups have been better able to report on their progress towards meeting the project outcomes. In addition to the reporting requirements introduced in 2005, current contribution agreements require sponsor organizations to identify performance indicators and their data collection strategy. Therefore, this recommendation has already been addressed.

The Report identifies the need to improve the overall tracking of the CII budget that goes to administration. It is to be noted that if a complete project file review had been selected as part of the evaluation document review, the tracking of the overall CII budget would have identified the actual allocation of expenditures, including the portion attributed to administration.

## **The evaluation indicated a need to increase understanding of the CII at the regional and local levels, and to make further use of the self-evaluation and lessons-learned processes.**

The 2005-2006 CII “Transition Year,” enabled the sponsor organizations to examine past lessons and successes and assess the future direction of the Initiative at the national, regional and local levels. The “Transition Year” allowed the sponsor organizations to increase their profile in the community; identify ways to influence community systems; build and create partnerships; and develop a more focused approach to future planning. Efforts are continuing to build on these initiatives and to keep members within the disability sector both informed and engaged through meetings and active communication (e.g. newsletters, web sites).

Officials continue to work with the sponsor organizations to improve mechanisms to share lessons learned and new knowledge, for example through funded events such as the National Partners’ Meetings, and use of the *Community Inclusion Website* to disseminate reports.

It is agreed that better definitions of key terms such as “organizational capacity”, “community capacity” and “inclusion” are required to ensure a common understanding in language. It is recommended that the CII Working Committee address this issue by providing a common definition of these key terms. The Terms and Conditions of the program are expiring in March 2008, and the issue regarding the ambiguity of the key terms will be addressed as part of the program renewal.

This recommendation has been and will be addressed by spring 2008.

**The evaluation indicated a need to add to the involvement of people with disabilities, and increase the representation of members of Aboriginal and ethno-cultural minority communities in the design and delivery of CII funded activities.**

The focus of the CII has been the inclusion of people with intellectual disabilities. However since 2005, the CII projects in general have increased their reach to include people with other types of disabilities, and have increased the representation of members of Aboriginal and ethno-cultural minority communities. Current project activities include providing support to families of people with disabilities in rural areas; developing partnerships with First Nations family groups; and increasing participation of ethno-cultural minority groups. This issue has been addressed.

### **Summary**

The CII program continues to achieve the intended results through the current contribution projects. Through the use of performance indicators and an improved data collection strategy, the Department is now better able to assess and demonstrate the effectiveness of this Initiative administered through the Social Development Partnerships Program – Disability component.

# ***1. Introduction***

This report provides a summary of the formative evaluation of the Community Inclusion Initiative (CII). The formative evaluation was undertaken to examine the CII's relevance, clarity and aspects of design and delivery. It also took a preliminary look at the results to date. The summary provided in this report consists of six sections.

- Section 1 presents a brief description of the initiative and its context, and also presents the scope and methodology of the evaluation;
- Section 2 examines the relevance and rationale of the CII;
- Section 3 examines aspects of clarity and measurability;
- Section 4 examines aspects of design, delivery and implementation;
- Section 5 takes a preliminary look at results, impacts and cost-effectiveness; and
- Section 6 presents overall conclusions and identifies areas for improvement.

## **1.1 Program Overview and Context**

The CII is a national community development initiative that aims to promote the economic inclusion, full participation, and citizenship of Canadians who are intellectually disabled (referred to as people with disabilities in this report). The CII was launched in 1997 by Human Resources Development Canada (HRD). It is managed by the Office for Disability Issues (ODI) under the umbrella of the Social Development Partnership Program (SDPP).

The CII national plan was developed in 1997 by HRD and the Canadian Association for Community Living (CACL), in accordance with the objectives of the SDPP and in response to recommendations made in the 1996 report of the Federal Task Force on Disability Issues. The primary goal of the CII, under this plan is:

to assist communities to develop the capacities they require to successfully include people with intellectual disabilities in ways that promote their roles as full citizens.

The Community Inclusion Initiative supports activities and projects related to:

- The strengthening of supports for individuals and families, including efforts towards facilitating and enriching personal relationships, employment and enabling citizenship; and
- The development of communities which can support individuals and their families including changes to community structures, influencing the associational life of communities and revising community systems, laws and policies.

The federal government allocated an initial \$3 million to the CII for 1997/98, followed by an estimated \$18 million (\$3 million per year) over the period from 1998 to 2004. These funds were disseminated through contribution agreements under the umbrella of the SDPP to two non-government organizations (NGOs): CACL and People First Canada (PFC). Both NGOs have a national body, provincial/territorial counterparts and a large number of community-based chapters. On average, \$2,750,000 per year was disseminated to the Association for Canadian Living (ACL) component, and \$250,000 per year was disseminated to the People First (PF) component.

The approximate 90/10 allocation of funding between the ACL and PF components was determined in 1997, based on certain criteria including size and capacity of the organization, and provincial/territorial presence. In the case of ACL, population size has been the key determinant in ODI's distribution of funds across provinces and territories. In the case of PF, provincial and territorial PF NGOs have each received a flat rate of \$10,000 per year, with additional funding going to larger provinces.

Projects are funded based on proposal calls or other selection processes undertaken by the NGOs within each province/territory. At the start of the evaluation (2004), a total of more than 400 projects had been approved.

The CII's national plan offered considerable scope for flexibility at the project level. For example, project goals could vary across the NGOs. In addition, the NGOs could define and operationalize terms such as "community capacity building" according to their needs. Within this flexible framework, the two NGOs have tended to use different approaches to distribute funds and undertake inclusion work.

- PF members with disabilities are self-advocates. Projects undertaken through PF organizations tend to be directed, designed, implemented and delivered by people with disabilities.
- ACL originates from an organization founded by families of children with disabilities. Projects undertaken through ACL organizations tend to focus on achieving changes for individuals with disabilities, their families and community processes – with less emphasis on advocacy issues.

Between 1998-2002, funding to jurisdictional NGOs was renewed annually, pending receipt and approval of proposals. Beginning in 2003, the funding term was extended to three years, and proposals were written detailing three-year plans.

## 1.2 Evaluation Scope and Methodology

The formative evaluation of the CII was initiated in 2004 to provide ODI with the necessary information to make well-informed decisions regarding possible future directions for the CII. This included assisting ODI in taking steps to enhance the evaluability of the CII. As noted in Section 1.1, the CII was governed by the 1997 Terms and Conditions for the SDPP. New Terms and Conditions for the SDPP emphasize a more results-based management approach. Therefore the formative evaluation of the CII was designed to include issues related to clarity and measurability, and to provide a preliminary look at results, impacts and cost-effectiveness.

The evaluation was undertaken by Social Development Canada (SDC)<sup>1</sup> in collaboration with ACL and PF.<sup>2</sup> It was focused on the period from 1997 to 2005, and particularly on fiscal years 2003-2004 and 2004-2005. It was also focused on the following four key issues:

- whether the CII's rationale, goal and key activities continue to be relevant;
- the extent to which the CII's terms, targets and objectives are clear and measurable;
- strengths and weaknesses of the CII's design, delivery and implementation; and
- taking a preliminary look at whether the CII is achieving its intended results and impacts.

Six main sources of information were used to conduct the formative evaluation:

- a review of documents and literature;
- a project census collected information on (n=163) CII projects<sup>3</sup> conducted for the fiscal years 2003-2004 and 2004-2005;
- a total of nine case studies took an in-depth look at three provincial ACL NGOs, three provincial PF NGOs and three national projects;
- key informant interviews (with four ODI officials, five ACL representatives, six PF representatives, and five provincial/territorial representatives);
- a stakeholder survey (n=255) obtained additional evidence from groups not extensively included in other components of the methodology (e.g. community members, representatives of governments, and members of families of people with disabilities) as well as members of ACL and PF (staff, volunteers, etc.); and
- interviews of people with disabilities (n=100).

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<sup>1</sup> Now part of Human Resources and Social Development (HRSDC).

<sup>2</sup> These two organizations provided direction and assistance for the evaluation through an evaluation working group.

<sup>3</sup> For the two NGOs, n=141 for ACL, and n=22 for PF.

Several cautions and limitations should be noted.

- Most of the sources of information either manage the CII (ODI officials) or benefit from the CII (contribution agreement holders, or stakeholders involved in funded projects). Given these circumstances, the evaluators were very much aware of the importance of exercising professional judgement when reporting comments/opinions and ensuring appropriate qualifiers were in place so that readers could understand the source and context of the information. Similarly in drawing evidence from CII internal documentation and reports, the evaluators were mindful of the fact that the information should not be considered to be “independent”. As well, particular emphasis was placed on the in-depth analysis conducted by the case studies, which included evaluators’ observations at four CII-funded events.
- Several factors limited the types of evidence that could be drawn from the document review. In particular, the evaluators found that CII internal documentation generally lacked quantitative detail that could be used for evaluation purposes.
- The findings from the stakeholder survey should be considered to be highly exploratory for several reasons. The sample (which was drawn from lists of participants from a random sample of CII projects for fiscal years 2003-2004 and 2004-2005) is small in relation to the large numbers reported to be reached by the CII. The subgroup analyses are based on smaller samples and, therefore, should be regarded as purely indicative. It should also be noted that there is overlap among the subgroups, as some respondents identified themselves as being a member of more than one subgroup<sup>4</sup>. In addition, it was not possible to weight the data.<sup>5</sup> This means that the overall results from the stakeholder survey will be biased in favour of the two largest respondent groups: CII affiliates, and community affiliates.
- In the case of interviews of people with disabilities, several cautions/considerations should be noted. First, although the interviewees reported participation in a broad range of project types, they were not a representative sample of all CII participants or of the overall target group. Second, there was uneven data collection across some questions because of different interviewer styles and because two sets of revisions were made to the questionnaire following the first few interviews.

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<sup>4</sup> Although this overlap leads to some double counting of respondents in the subgroup analysis, it is important to emphasize that there is no double counting of respondents when the overall results for the stakeholder survey are being reported.

<sup>5</sup> The original database could not be used for this purpose for reasons of confidentiality.



## 2. *Relevance and Rationale*

This section examines the relevance and rationale of the Community Inclusion Initiative (CII) by examining:<sup>6</sup>

- how the CII's relevance, goal and key activities have evolved since 1997;
- whether the CII's rationale, goal and key activities are still relevant; and
- whether the CII's rationale, goal and key activities address real inclusion needs and priorities of people with disabilities.

### 2.1 How has the CII Evolved Over the Past Seven Years?

*Some aspects of the CII have evolved since 1997.*

The document review and key informant interviews indicate that a number of changes have occurred over the past seven years.

- The CII has evolved towards addressing certain themes and making systemic changes. Examples include inclusive education and the child welfare system.
- The 2003 *National PAR Report* indicated that the CII has matured by incorporating interventions at multiple levels. This has included a move towards increasingly concrete partnerships and capacity building.
- Several key informants indicated that the CII has become more user-friendly in the last few years, with the community exerting greater ownership over the direction of projects.
- The 2004 *Transforming Communities Report* describes the evolution of the CII's steering committees. Although the National Steering Committee was considered to be very important during the start-up phase, steering roles were devolved to the provincial/territorial level as the need for a national steering body diminished.
- The increase in the project funding period from one year to three years for 2003 to 2005 has permitted project planning and longer-term community development.

*One area that has not evolved very much is the approximate 90/10 allocation of funding between the ACL and PF components.*

As noted in Section 1.1, the approximate 90/10 allocation of funding between ACL and PF components was determined in 1997, based on certain criteria including size and capacity of the organization, and provincial/territorial presence. The share of overall CII funding allocated to PF is discussed further in other Sections, particularly Section 4.1.

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<sup>6</sup> The question of to what extent the CII enlists and mobilizes communities and sponsored NGOs toward the goals of inclusion is examined in Section 5.3.1.

## 2.2 Is the CII Still Relevant?

*The CII's rationale, goal and key activities continued to be relevant to federal and provincial/territorial governments.*

The document and literature review indicate that the continued relevance of the CII is strongly supported in government documents, the academic literature and national surveys. For example a recent study<sup>7</sup> supports the CII's premise for inclusion, stating that there is a growing body of evidence that suggests that people with strong social networks lead healthier and happier lives. In addition, the 2004 *Survey of Canadian Attitudes* found that persons with intellectual disabilities are the least understood by Canadians (among all groups with disabilities). The same survey also found that Canadians believe the needs of the intellectually disabled can be met by voluntary organizations more so than by government programs.

The document review also found that the continued relevance of the CII is evidenced by federal strategies and reports such as the *National Strategy for the Integration of Persons with Disabilities* (1996), the 1998 report entitled *In Unison: A Canadian Approach* (GOC 1998), and the 2004 report entitled *Advancing the Inclusion of People with Disabilities* (SDC 2004).

The key informant analysis and stakeholder survey provided further evidence that the CII continued to be relevant to federal and provincial governments. Key informants who were government officials felt that the broad goals of community inclusion are highly relevant. Three-quarters of the respondents to the stakeholder survey who were affiliated with government rated the CII as "very important" to achieving inclusion (see Table 2.1).

<b>Table 2.1</b> <b>Importance of CII in achieving inclusion, by affiliation</b>						
	(%)					N
	Not important	2	3	4	Very important	
CII	0	0	1	1	97	134
Community	0	2	6	9	83	128
Family	0	0	3	3	94	62
Government	0	0	7	18	75	28
<b>Overall</b>	<b>0%</b>	<b>1%</b>	<b>3%</b>	<b>7%</b>	<b>89%</b>	<b>235</b>
Source: Survey of stakeholders.  Note: CII respondents included staff and volunteers of a CII organization. Community respondents included members of schools, health agencies and religious groups. Family respondents are in families of people with disabilities. It should be noted that some respondents identified themselves as being a member of more than one group. Therefore, some double counting occurs in the subgroup analysis, but not in the overall analysis of the respondents.						

<sup>7</sup> McLeod, Nelson & Associates, *Community Inclusion – Enhancing Friendship Networks Among People with a Cognitive Impairment*, Australian Department of Human Services, 2003.

In the case of interviews of people with disabilities, all interviewees (n=77) indicated that being included or a part of the community is important to them. At the same time, only 60% (n=39 of 65 interviewees) indicated that they felt included “most everywhere”.

***The CII’s rationale, goal and key activities continued to be relevant from the perspective of SDPP objectives and NGOs (ACL/PF) objectives.***

The Terms and Conditions of the SDPP, including the program’s logic model (attached as Annex A), indicate that the longer-term objectives of the SDPP are to:

- increase the effectiveness of the non-profit sector in meeting the social development needs and aspirations of people with disabilities, children and their families and other vulnerable or excluded populations; and
- improve the quality and responsiveness of social policies and programs.

Both the stakeholder survey and key informant analysis indicated that the CII continued to be relevant from the perspective of SDPP and NGOs objectives. As indicated in Table 2.1, most (89%) of the respondents to the stakeholder survey rated the CII as “very important” to achieving inclusion. Looking at the subgroups indicates that the CII was rated as “very important” to achieving inclusion by 97% of the CII respondents, 94% of the family respondents, and 83% of the community respondents. Similarly, key informants who were representatives of ACL or PF indicated that the CII was important to the work of their organization.

The project census data indicated that the types of projects/activities undertaken by the NGOs under the CII during fiscal years 2003-2004 and 2004-2005 were in line with the CII’s inclusion objectives.

- In total, close to half of the projects were aimed at community living/inclusion (17%), education/literacy (12%), self-advocacy/rights (10%) and social networks/support (9%), as shown in Table 2.2.

<b>Table 2.2 Types of projects</b>			
	<b>% Projects</b>		
	<b>ACL</b>	<b>PF</b>	<b>Total</b>
Awareness	5	9	6
Community Living/Inclusion	16	23	17
Self-Advocacy/Rights	11	9	10
Leadership	6	9	6
Family/Parenting	11		9
Youth/Inclusion	8		7
Social Networks/Support	8	18	9
Education/Literacy	11	18	12
Employment	6		6
Fetal Alcohol Syndrome	2		2
Research	7		6
Other	10	14	10
Source: Project census for fiscal years 2003-2004 and 2004-2005.			
Note: n=129 for ACL, n=21 for PF, and n=150 for total projects.			

- As shown in Table 2.3, one-third or more of the projects that encouraged self-determination did so through supportive living (36%), self-advocacy groups (33%) and/or other self-determination activities<sup>8</sup> (40%). Comparing the two funded organizations indicated that the majority of the PF projects (77%) were reported to be encouraging self-determination through self-advocacy groups, while many ACL projects were encouraging self-determination through supportive living (40%) or other self-determination activities (43%).
- As shown in Table 2.4, the majority of CII projects that were building community partnerships and coalitions did so by working with community organizations and social services (67%), other community partnership coalitions (49%) and/or with government (48%).

<sup>8</sup> Other self-determination activities include open dialogues and focus groups where participants can share personal stories.

<b>Table 2.3</b> <b>Encouraging individual self-determination through specific activities</b>			
Activity	% Projects		
	ACL	PF	Total
Supportive living	40	23	36
Supportive employment	20	9	17
Development of life, job, and safety skills	18	18	18
Self-advocacy groups *	19	77	33
Other self-determination activities	43	27	40
Source: Project census for fiscal years 2003-2004 and 2004-2005.			
Note: * $p$ is less than or equal to 0.001. Other self-determination activities include open dialogues and focus groups where participants can share personal stories.			

<b>Table 2.4</b> <b>Building community partnerships and coalitions through specific activities</b>			
Activity	% Projects		
	ACL	PF	Total
Work with government ***	54	27	48
Work with community organizations/social services **	74	46	67
Work with schools ***	40	14	34
Work with faith communities	14	0	11
Work with other community partnerships-coalitions **	57	12	49
Source: Project census for fiscal years 2003-2004 and 2004-2005.			
Note: ** $p$ is less than or equal to 0.01. *** $p$ is less than or equal to 0.025. **** $p$ is less than or equal to 0.05.			

The in-depth analysis conducted by the case studies also indicated that NGO projects and activities under the CII are reflective of the CII's rationale, goals and activities. The following brief description of each of the case studies provides an illustration of how projects/activities reflect the CII's rationale and goal.

- The case study analysis examined two national projects undertaken by the CACL and one national project undertaken by the PFC.

- The ***Participatory Action Research (PAR)*** project of the CACL provided for learning and information exchange through a self-evaluation process. **PAR** required provincial and territorial CII project leaders and other stakeholders to gather information on projects and number/types of people and communities involved. This research was drawn together to form provincial/territorial reports and summarized annually in a national **PAR** report.<sup>9</sup> In addition, **PAR** events were held annually across each province/territory and included a cross-section of CII stakeholders. These events focused on sharing and gathering experiences and lessons learned from successes/challenges from CII projects across provinces/territories.
  - The ***Inclusive Education*** Project<sup>10</sup> of the CACL focuses on building partnerships, developing information, managing knowledge, and training service providers to support inclusive education policies across Canada.
  - ***Project Learning*** brought together PF members and advisors from PF CII-funded projects to: share and learn what each jurisdiction has accomplished with CII funding; reflect on CII project successes, challenges and possible solutions; and develop future direction for PF chapters.
- The case study analysis also examined three provincial ACL NGOs and three provincial PF NGOs.
    - ***Alberta Association for Community Living (AACL)*** links more than 40 non-profit community organizations across six regions of Alberta. Over the past seven years, AACL has worked for inclusive practices within the child welfare system, and on family-to-family support and leadership initiatives. Examples of CII-funded projects include:
      - ▶ ***Family Voices:*** seeks to facilitate effective and organized input from families by using the regional network of families and adults with developmental disabilities to influence policies and enhance services; and
      - ▶ ***From Protection to Inclusion:*** aimed at addressing the needs of children with disabilities and their families in relation to the child welfare system and access to disability-related family supports.
    - ***Saskatchewan Association for Community Living (SACL)*** has undertaken initiatives developed at the grassroots level under the umbrella of the Grassroots Alliance Community Inclusions Project (or Alliance). The Alliance is a province-wide network of partnerships for pooling funding and resources. The goal of the Alliance is to promote inclusion in Saskatchewan communities. Activities have included: development of educational tools, recreational events, conferences and meetings, and mentoring initiatives. Examples of CII-funded projects include:

<sup>9</sup> The **PAR** team – which consisted of representatives from ACL, PF and government – was discontinued in 2004-2005.

<sup>10</sup> Also known as ***Strengthening Partnership: A National Dialogue on Inclusive Education in Canada***. Inclusive education refers to the integration of students with disabilities into the mainstream school system at all levels (including in classrooms, recreation and extra-curricular activities.)

- ▶ the ***Response Fund 2004-2005***: has funded activities such as ***Summer Sensations*** (a summer recreation program for persons with intellectual disabilities), ***Travel Playgroup*** (providing regular playgroup opportunities for pre-schoolers with intellectual disabilities and their families in isolated areas), and ***Companion Youth*** (a program to train youth to become companions/caregivers for people with intellectual disabilities); and
  - ▶ the ***Self-Advocacy Action Group (SAAG)***: members speak about the rights of individuals with disabilities, and have developed a script and cast for a ***high school video*** to inform teens about the experiences of youth with disabilities in high school and college.
- **Community Living Ontario (CLO)** has more than 100 affiliated local associations. Local associations provide direct services and support to individuals. The CLO also offers training and consultation in a variety of areas such as family support, community participation, advocacy and self-planning. Examples of CII-funded projects include:
  - ▶ ***It Takes a Village . . . Where All People Belong***: developed a network of province-wide and regional/local projects aimed at enhancing the rights of people with intellectual disabilities;
  - ▶ ***It's a Matter of Rights***: an ongoing project to develop a listening book about rights for dissemination to social service providers, schools and libraries throughout the province; and
  - ▶ ***Inclusive School Cultures***: aimed at researching and learning from other education models around the world, and developing a process for schools to promote, create and nurture an inclusive school culture in Ontario.
- **People First of Saskatchewan (PFS)** had seven local chapters at the time of the case study. PFS activities have included two or three workshops per year and other projects focusing on leadership training, communication skills, de-institutionalization, storytelling, outreach and awareness building. Examples of CII-funded projects include:
  - ▶ the ***Life Landscape/Leadership Workshops***: focused on developing leadership skills and raising awareness about rights of persons with intellectual disabilities; and
  - ▶ the ***Self-Advocacy Workshops*** project: to share common self-advocacy challenges and opportunities, promote PF, and build awareness about rights.
- **People First of Manitoba (PFM)** had seven local chapters at the time of the case study. Examples of CII-funded projects included:

- ▶ ***Spotlight on Advisors:*** a workshop focused on teaching PF members, advisors and potential advisors about the role of PF advisors;<sup>11</sup> and
- ▶ ***Safety in the Community:*** a workshop held in rural Manitoba and focused on strengthening community capacity by bringing together PF members, advisors, and the community, to discuss rights and safety issues.
- ***People First of Nova Scotia (PFNS)*** had eight local chapters at the time of the evaluation study. Their approach has emphasized building on previous knowledge and results. Initial projects focused on increasing public awareness regarding the situation of people with disabilities (e.g. a public education project resulted in the member-driven production of a video, **Dispelling the Myth**, featuring plays that address misconceptions about people with disabilities). Over time, the focus shifted to providing workshops and other educational opportunities to enable people with disabilities to become autonomous in the community (e.g. the **Building Capacity for Community Inclusions and Integration Project** is aimed at the community's capacity towards inclusion by addressing member-relevant inclusion issues).

The case study analysis also provided further evidence of the continued relevance of the CII. For example, stakeholders interviewed for the case studies emphasized that the CII's objectives were in line with the SDPP in developing networks and alliances.<sup>12</sup> Stakeholders interviewed for the case study analysis also felt that the objectives of the CII were in line with the goals of the NGOs to build capacity. In addition, the relevance of the CII was evidenced by CII projects that are now funded by other sources including provincial governments. For example, the AACL's ***From Protection to Inclusion*** project is ongoing (although CII funding ended prior to 2003) and is carried out in partnership with the Calgary Region Children's Authority.<sup>13</sup>

## 2.3 Does the CII Address Real Priorities and Needs?

*Evidence indicates that the CII addresses the real inclusion needs and priorities of people with disabilities.*

The CII model and similar programs for people with disabilities is strongly supported in academic literature. For example, the early literature clearly points to the value of community living for people with disabilities, and the later literature points to the value of community inclusion for people with disabilities.<sup>14</sup> In addition, the importance of self-determination in addressing the needs of people with disabilities is evidenced in the reports by Bannerman (1990), Bogdan and Taylor (1999) and Keith (1990).

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<sup>11</sup> PF advisors are volunteers who support people with disabilities on a one-to-one basis.

<sup>12</sup> The ability of the CII to mobilize communities and partners is examined further in Section 5.3.1 as part of the discussion of results and outcomes.

<sup>13</sup> The sustainability of CII projects/activities is examined further in Section 5.5.

<sup>14</sup> For example, the document/literature review noted that Pedlar et al. outlines the transition of persons with intellectual disabilities from institutions to communities, beginning in the 1960s, when the rights of people with disabilities began to be a focus for public dialogue.



In the case of interviews of people with disabilities, the interviewees indicated diverse responses when they were asked to identify barriers to inclusion and what would be needed to feel more included.<sup>15</sup> This suggests that the CII's flexibility and its emphasis on supporting individual development and localized approaches to community inclusion is an appropriate way to identify and respond to real priorities and needs.

The key informants generally felt that the CII was addressing real inclusion needs and priorities. The case study analysis also provided evidence that the CII is addressing real needs and priorities. For example, people with disabilities interviewed as part of three case studies (SACL, PFS, and PFM) indicated that their inclusion needs were being addressed through CII projects.

The stakeholder survey looked at several indicators – and found that those indicators provided additional evidence that the CII was addressing real needs and priorities. As shown in Table 2.5, the majority of respondents (84%) rated the CII as either “very effective” (46%) or “effective” (38%) in including people with disabilities in all areas of projects.

<b>Table 2.5</b> <b>Effectiveness of the CII in including persons</b> <b>with disabilities in all areas of projects, by affiliation</b>						
	<b>(%)</b>					<b>N</b>
	<b>Not effective</b>	<b>2</b>	<b>3</b>	<b>4</b>	<b>Very effective</b>	
CII	1	3	10	35	51	124
Community	1	7	11	32	49	105
Family	0	4	16	39	41	51
Government	0	5	20	45	30	20
<b>Overall</b>	<b>1</b>	<b>4</b>	<b>11</b>	<b>38</b>	<b>46</b>	<b>198</b>
Source: Survey of stakeholders.  Note: CII respondents included staff and volunteers of a CII organization. Community respondents included members of schools, health agencies and religious groups. Family respondents are in families of people with disabilities. It should be noted that some respondents identified themselves as being a member of more than one group. Therefore, some double counting occurs in the subgroup analysis, but not in the overall analysis of the respondents.						

<sup>15</sup> When asked “What stops you from being included?” the three most frequently cited barriers were: inadequate support, services and/or accommodation (e.g., limited government support, lack of understanding of issues or respect for perspectives, greater need for plain language, wheelchair accessibility, large print) (cited by 41 of 52 interviewees); limited access to or challenges to finding good jobs (cited by 19 of 52 interviewees); and personal limits (e.g. literacy, getting along with others, don’t like big crowds) (cited by 16 of 52 interviewees). When asked “What would be required to make you feel more included?” the three most frequently cited ways of surmounting barriers were: better access and/or accommodation (cited by 27 of 52 interviewees); increased access to work/better work (cited by 19 of 52 interviewees); and more opportunities to get out, participate (cited by 15 of 52 interviewees).

As shown in Table 2.6, the majority of respondents (85%) rated the CII as either “very effective” (50%) or “effective” (35%) in improving the lives of people with disabilities.

<b>Table 2.6</b> <b>CII's effectiveness in improving the lives of people with disabilities, by affiliation</b>						
	(%)					N
	Not effective	2	3	4	Very effective	
CII	0	4	6	31	59	130
Community	0	7	16	33	45	116
Family	0	7	9	30	54	57
Government	0	12	8	56	24	25
<b>Overall</b>	<b>0</b>	<b>6</b>	<b>10</b>	<b>35</b>	<b>50</b>	<b>217</b>
Source: Survey of stakeholders.  Note: CII respondents included staff and volunteers of a CII organization. Community respondents included members of schools, health agencies and religious groups. Family respondents are in families of people with disabilities. It should be noted that some respondents identified themselves as being a member of more than one group. Therefore, some double counting occurs in the subgroup analysis, but not in the overall analysis of the respondents.						

*The flexibility of the CII's framework and the processes used to identify projects that respond to issues and needs at the local level were cited as factors that help the CII to address real inclusion needs and priorities.*

All ACL key informants pointed to the flexibility of the CII's framework, which was designed to respond to the issues and needs of participants at the local level. The key informants who were provincial/territorial government officials felt that the CII was meeting needs and priorities by establishing connections to local inclusion issues and by focusing on community capacity building. In addition, stakeholders from four of the case studies (PFS, CLO, SACL and AACL) noted that the processes used to identify projects (which draw input from communities and grassroots) are consistent with identifying and addressing needs and priorities.

*Key informants suggested that the CII's overall funding level (\$3 million per year) limits what the CII can accomplish.*

Two PF key informants felt that PF requires increased funding to be able to really meet the needs of people with disabilities. In addition, ACL key informants and three of the ODI key informants felt that the small size of the CII budget (\$3 million per year) limits what can be accomplished.

### 3. Clarity and Measurability

This section examines whether the Community Inclusion Initiative (CII's) terms, targets and objectives are clear and measurable by examining:

- whether the CII's mandate, operations, roles and responsibilities, and monitoring processes are clearly understood by stakeholders and participants with and without disabilities;
- whether the CII has clear targets in terms of reach<sup>16</sup> and expected results, and whether the targets are properly identified;
- how CII stakeholders define, operationalize and measure terms such as “organizational capacity”, “community capacity” and “inclusion”; and
- whether information gathering processes are appropriate.

#### 3.1 Is the CII Clearly Understood?

*The evidence suggests that most key stakeholders probably had a good understanding of the purpose, goals and actions of the CII – but there is less understanding of the CII at the regional and local levels and among people with disabilities.*

As shown in Table 3.1, most (80%) respondents to the stakeholder survey felt they understood the purpose, goals and actions of the CII either “very well” (54%) or “well” (26%).

<b>Table 3.1</b> <b>Understanding of the purpose, goals and actions of the CII,</b> <b>by affiliation (%)</b>						
	(%)					N
	Not well	2	3	4	Very well	
CII	0	1	8	18	74	131
Community	6	6	13	31	44	132
Family	5	6	10	16	63	63
Government	3	7	10	38	41	29
<b>Overall</b>	<b>5</b>	<b>5</b>	<b>10</b>	<b>26</b>	<b>54</b>	<b>239</b>
Source: Survey of stakeholders.  Note: CII respondents included staff and volunteers of a CII organization. Community respondents included members of schools, health agencies and religious groups. Family respondents are in families of people with disabilities. It should be noted that some respondents identified themselves as being a member of more than one group. Therefore, some double counting occurs in the subgroup analysis, but not in the overall analysis of the respondents.						

<sup>16</sup> “Reach” typically refers to the number of individuals (either in total or by group) that a project/activity is expected to influence or affect.

When respondents to the stakeholder survey were asked about their perceptions of how well other groups appeared to understand the CII, the respondents indicated that:

- people with disabilities understood the CII fairly well (with 39% of the survey respondents indicating that they perceived people with disabilities to understand the CII either “very well” (7%) or “well” (32%) – and 7% indicating “not well”);
- different levels of government could have had a better understanding of the CII (with 37% of the survey respondents indicating that they perceived different level of government to understand the CII either “very well” (11%) or “well” (26%) – and 6% indicating “not well”); and
- the general public did not have a very good understanding of the CII (with 27% of the survey respondents indicating that they perceived the general public to understand the CII either “very well” (6%) or “well” (21%) – and 14% indicating “not well”).

The key informant analysis suggested that the CII framework was probably well understood at the national and provincial/territorial levels, but less understood among participants in projects at the regional and local levels. For example, three of the five ACL key informants felt that the CII was well understood at the national and provincial/territorial levels, but less understood by project participants at the regional/local levels. Most of the PF key informants felt that significant improvements are needed in communicating the CII to all those involved.

The in-depth analysis conducted by the case studies indicated that the participating NGOs (ACL/PF) and most other key stakeholders usually had a good understanding of the mandate/objectives of the CII. For example, evidence collected for three of the case studies (*Project Learning, PAR*, and CACL’s *Inclusive Education*) suggested that the CII’s mandate/objective was generally understood by most groups involved in the CII. At the same time, however, two of the case studies (PFS and PFNS) suggested that some key stakeholders may not have a very good understanding of the CII’s mandate/objective and roles.

The case study analysis also indicated some gaps in understanding in the case of other participants such as grassroots participants and some community groups. For example, the *PAR* case study suggested that grassroots participants in *PAR* focus groups had less of an understanding of CII projects and the role of *PAR* events for sharing and learning. In the case of the *Inclusive Education* project, the case study analysis noted some gaps in understanding as reflected in actions of certain groups such as school principals and boards of education.

Looking at people with disabilities, some of the case studies (AACL, SACL and CLO) indicated that people with disabilities probably have a fairly good understanding of the CII’s broad goals and role. At the same time, however, two of the PF case studies (PFNS and PFM) suggested that most people with disabilities might not have been aware of the CII or its goals.

*The case study analysis suggested that some of the CII's processes (such as paperwork and accountability requirements) are probably not very well understood by participants with and without disabilities.*

For example, the **PAR** case study suggested that, at times, family members had difficulty understanding CII's administration processes (e.g. government funding accountability requirements, paperwork and delays). Similarly, some of the stakeholders interviewed for CALC's **Inclusive Education** project felt that more education about the CII's processes was needed. As well, the case studies suggested that, when people with disabilities have an understanding of the CII, their understanding tends to be at the level of the CII's mandate, goals and role – rather than at the level of CII financial and accountability processes.

### 3.2 How do Stakeholders Define and Measure Key Terms?

*The evidence indicates that a variety of ways are being used to define key terms such as “organizational capacity”, “community capacity” and “inclusion”.*

The document review indicated that a wide variety of terms and approaches are being used in **PAR** and CII publications.

The in-depth analysis conducted by the case studies indicated that a range of ways are being used to define key terms.

- The case study analysis found that the term “inclusion” resonated conceptually and practically among stakeholders and people with disabilities who were interviewed as part of the case study analysis, but that no single definition was being used for this term. In the case of PFNS, for example, stakeholders expressed the view that people have different understandings of the term “inclusion”. In the case of CACL's **Inclusive Education** project, one stakeholder noted that there was some debate about the meaning of “inclusion”.
- The case study analysis found that terms such as “organizational capacity” and “community capacity” resonated more with organizations. Once again no single definition was being used for each of these terms. For example, in the case of CACL's **PAR**, “organizational capacity” was associated with the NGO's ability to connect to the community. In the case of CACL's **Inclusive Education** project, some stakeholders associated “organizational capacity” and “community capacity” with knowledge, leadership and ability to follow through on goals and objectives. In the case of PFNS, stakeholders expressed the view that people have different understandings of the term “organizational capacity”.

As part of the Canada-wide interviews of people with disabilities, interviewees were asked to define “inclusion” and “community”.

- In the case of “inclusion”, 57% of the responding interviewees (n=46 of 81 interviewees) provided definitions based on belonging, 26% (n=21 of 81 interviewees) provided definitions based on access, and 28% (n=23 of 81 interviewees) provided definitions based on participating in or giving back to the community.
- In the case of “community”, 64% of the responding interviewees (n=47 of 74 interviewees) provided definitions based on ideal characteristics (such as belonging, people helping each other, working together, or being comfortable), 32% (n=24 of 74 interviewees) provided definitions based on geography (such as neighbourhood, or the town where I live).

Key informants indicated that different definitions for key terms are being used by various stakeholder groups – but generally felt that this flexibility in language aided the CII in allowing projects to reach their objectives.

### **3.3 Does the CII Have Clear and Defined Targets?**

*The evidence indicates that the CII’s targets are not well-defined in terms of reach and expected results.*

The document review found that the CII’s targets for reach and expected results have not been clearly stated in CII documentation. Examined documents also suggested that the setting and measurement of targets occurred mainly in the context of NGO planning and assessment processes.

ODI key informants indicated that the CII’s non-prescriptive framework encouraged communities to self-identify relevant needs and inclusion issues. Within this framework, targets are established in response to communities. At the same time, other key informants (particularly ACL key informants) felt that additional work could be done in the establishment of more effective targets and evaluation tools.

The project census data and the case study analysis suggest that targets at the project level might not be appropriately identified in terms of reach and expected results.

- Information provided by respondents to the project census indicated that the majority of projects (91%, or 148 projects) during the fiscal years of 2003-2004 and 2004-2005 had written and clearly identified inclusion-oriented goals, targets and/or objectives. The project census also found, however, that targets were described/specified by respondents in terms of target group rather than in terms of reach and expected results.
- The case study analysis provided additional evidence to suggest that targets at the project level might not be appropriately identified in terms of reach and expected results.

- Only one of the case studies (CLO) showed that clear targets had been identified in terms of reach. For the other case studies, reach appeared to be defined broadly, measured inconsistently across projects, or not addressed.
- Regarding expected results, five of the case studies (Project Learning, AACL, CLO, PFM and PFNS) showed that clear and defined targets had been identified. In the other cases, expected results were either expressed in broad terms or only some work had been done to develop targets.

### **3.4 Are Information Collection Processes Appropriate?**

*Although it appears that information collection/reporting has met federal standards for accountability for the use of funds, the evidence suggests that this has involved considerable effort on the part of NGOs and community members.*

The evaluation study used the document review and key informant interviews with government officials to examine whether information collection/reporting requirements have met federal standards for accountability for the use of funds. The evidence suggests that federal standards for accountability have been met.

- An examination of financial monitoring reports indicated that accountability for financial use of funds appears to have met departmental standards.
- An examination of the activity and review reports submitted by NGOs present positive evidence of accountability.
- Most (3) of the ODI key informants felt that federal standards were met.

At the same time, evidence suggests that consideration should be given to developing ways to improve/simplify these information collection/reporting processes. For example, most (3) ODI key informants felt that meeting federal standards had required considerable effort. Similarly, a recurring theme in the responses to open-ended survey questions in the stakeholder survey was that the paperwork relating to the government's financial accountability requirements was too burdensome for community members and NGOs. In addition, MacLeod (2004) noted the complicated and voluminous reporting requirements that must be met by sponsored organizations to comply with contribution agreements.

*In the case of data collection processes related to results, the evidence suggests that better processes are needed to enable consistent collection of data that is clearly linked to measuring achievements/progress, based on objectives.*

ODI key informants felt that financial reporting was more robust than results reporting. As well, evidence from the document review and project census indicate that better and more systematic processes are needed for collecting data on projects and results.

- The document review indicated that CII documentation did not include a succinct list of projects/activities. The evaluators also found that the available documents provided a limited ability to categorize projects/activities in a systematic way. In addition, program impacts<sup>17</sup> were not well documented in the reviewed material.
- **PAR** processes tend to focus more on qualitative information, rather than quantitative data collection.
- The project census found that many projects were able to provide contact lists for staff leaders (79%), participants (71%) and partner organizations (61%), but that contact information is not routinely compiled. In addition, most respondents were only able to provide “best guess” estimates of the number of persons involved in designing and implementing projects, and “best guess” estimates of the number of persons reached directly or indirectly.
- MacLeod (2004) emphasized the need to increase the reporting of results and to harmonize data collection processes and reporting requirements to make information more useful across groups and jurisdictions.

The in-depth analysis conducted by the case studies indicated that some data collection processes were being used, but there was considerable variation across the case studies and only one case study appeared to be collecting baseline information.

Key informants generally felt that **PAR** has been valuable in trying to measure the outcomes of the CII, but expressed a need for more objective measurement of achievements and a process to validate **PAR** data. More than two-thirds (11 of 15) of the key informants felt that new or revised data collection processes are needed. Suggested improvements included:

- developing alternative ways of collecting information (e.g. pictorial, face-to-face and/or video reporting);
- revising data collection processes to facilitate the assessment of outcomes; and
- developing an indicator framework to deal with community capacity.

***There also appears to be a need to improve/refine the overall tracking of the proportion of the CII budget that goes to administration.***

As part of the formative evaluation, evaluators were asked to report on what proportion of the CII budget has supported administration and projects/activities. The evaluators used the document review and key informant interviews to attempt to answer this question, but found that neither of these sources was able to provide a clear estimate.

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<sup>17</sup> “Impacts” refers to changes/effects achieved by the CII that would not have occurred in the absence of the program.



- The evaluators were unable to address this question directly since a general file review was not selected as a line of evidence.<sup>18</sup>
- The key informant analysis indicated that estimates for administration vary widely. For example, ACL key informants reported variations in the definition of administration and consequently variations in the proportions of budgets going to that function (with their estimates ranging from 4% to 35%).
- The ODI key informants acknowledged that there was no fixed formula for administrative versus project/activity funding. They indicated that the voluntary sector uses between 10% and 20% as a guideline, with a suggested administrative funding cap of 25%.

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<sup>18</sup> The document review included ODI monitoring and activity reports (2002-2004) and **PAR** reports (1999-2004).



## 4. *Some Aspects of Design and Delivery*

This section examines some of the strengths and weaknesses of the Community Inclusion Initiative (CII's) design, delivery and implementation by examining two main areas:<sup>19</sup>

- CII funding and the delivery model (this includes examining whether funding decisions reflect CII priorities, what are the advantages/disadvantages of the CII delivery model, and are there viable alternative delivery models); and
- participation in the design and delivery of CII-funded activities (this includes examining whether these processes are promoting self-determination by including persons labelled as intellectually disabled).

### 4.1 CII Funding and the Delivery Model

*Key informants generally felt that the CII's distribution of funds by jurisdiction and organization was transparent and well communicated, however some expressed a concern about the adequacy of the share of CII funds allocated to the PF component.*

The key informant interviews were used to examine whether the CII's distribution of funds by jurisdiction and organization was fair, transparent and clearly communicated to partners. The interviews indicated that key informants from the Office for Disability Issues (ODI), provincial/territorial governments and ACL felt that the distribution of funds by jurisdiction and organization was transparent and well-communicated. The key informants from PF suggested that the provincial formula used to allocate CII funding was not well understood within their circle.

Some key informants expressed concern about the adequacy of the share of the CII funds allocated to the PF component.

- People First (PF) key informants felt that PF's share of CII's funds was inadequate, and several felt that PF's share was unfair when compared to ACL's share.
- ODI key informants felt that the 90/10 allocation of funds between ACL and PF was problematic. They noted that ACL funding was set at the beginning of the CII through a provincial allocation formula, while PF was added on soon after. At the same time, however, one ODI key informant felt that the 90/10 allocation between NGOs was appropriate.
- Two of the ACL key informants felt that PF should receive more funding, while three felt that overall budget limits were a big issue.
- Provincial/territorial key informants felt that the allocation was generally equitable, but that additional overall funds would help to accomplish more.

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<sup>19</sup> Evaluation questions regarding self-evaluation and new knowledge processes, as well as evaluation questions regarding what types of activities have contributed most effectively to strengthening community capacity and whether the CII is cost-effective are examined in Section 5.

*Needs for community and organizational capacity are identified at the community level through consultative processes among NGO stakeholders, participants, partners and communities.*

As noted in Section 1.1, the CII delivery model offers considerable flexibility at the project level to help foster community inclusion.

The key informant analysis and document review indicated that needs for community and organizational capacity building are identified at the community level through the ACL and PF components.

- The general view among the key informants was that community needs were identified by going into communities and consulting with “real people”.
- CII internal documents and **PAR** reports suggest that a variety of consultative processes are used. For example, the examined documents suggested that ACL’s provincial/territorial steering committee process brought together a wide range of partners.

*The evidence indicates that project funding decisions reflect CII priorities, although once again the share of funding for PF was identified as an area for review.*

The document review, project census, case study analysis and key informant analysis indicated that project funding decisions reflect CII priorities.<sup>20</sup>

- As detailed in the *2001 National PAR Report*, projects are proposed, designed and implemented through national and provincial/territorial ACL and PF organizations, which in turn use provincial/territorial steering committees for guidance on the project approval process. Under this process, criteria for successful approval for CII projects include consistency with CII principles, contribution to community capacity building, partnership fostering, specificity or meaningful outcomes, feedback on success and challenges, respect and relevance to jurisdiction, and alignment with five elements of community inclusion.<sup>21</sup>
- The project census and case study analysis indicated that the types of projects undertaken by NGOs are in line with the CII’s inclusion goals/objective (as discussed in Section 2.2). The types of projects undertaken by NGOs also involved developing partnerships (as discussed further in Section 5.3.1) and included projects designed to generate and share relevant information on new and emerging issues and approaches related to inclusion (**PAR** and **Project Learning**).
- Most key informants felt that funding decisions generally reflected CII priorities in promoting inclusion.

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<sup>20</sup> As a caution, however, it should be recalled that the evaluation study was unable to determine what proportion of the CII budget has supported administration (as discussed in Section 3.4).

<sup>21</sup> The five elements of community inclusion are: access to disability-related support, supportive personal relationships, self-determination, education and economic integration, and accessible communities.

Although all PF key informants felt that PF projects that were funded by the CII had reflected CII priorities, they felt that the distribution of overall CII funding between ACL and PF did not reflect CII priorities. Specifically they felt that the approximate 90/10 allocation of overall CII funds between the ACL and PF components favoured a family-driven organization (ACL) over a self-advocacy oriented organization (PF).

***The CII delivery model was identified as having a number of advantages and disadvantages in mobilizing communities and partnerships.***

### **Advantages**

In the reviewed documents, much of the success of the CII was linked to the CII's unique funding and delivery structure – which works through and is complemented by the structures of both the ACL and PF.<sup>22</sup>

Both the key informant analysis and the case study analysis highlighted the delivery model's flexibility – which allows for the identification of needs at the community level and is also considered to allow for creativity and the individualizing of projects.

Another advantage noted by the case study analysis and the key informant analysis was the three-year funding period – which has enabled greater project planning and greater success.

The case study analysis also highlighted the delivery model's national linkages and its ability to foster partnerships. The ability of the CII to mobilize communities and partnerships is examined in Section 5.3.1.

### **Disadvantages**

The document review, case study analysis, key informant analysis and stakeholder survey identified the reporting requirements as a disadvantage. For example, MacLeod (2004) noted that reporting requirements were substantial and complicated. PF and ACL key informants felt that reporting and monitoring requirements were too rigid. As noted in Section 3.4, a recurring theme in the responses to open-ended survey questions in the stakeholder survey was that the paperwork relating to the government's financial accountability requirements was too burdensome for community members and NGOs.

Key informants felt that there was a need for more flexibility in the three-year funding arrangement to enable projects to adapt to unforeseen changes.

Both the PF and ACL case studies indicated that the CII's delivery model has generated/involved some communications challenges. In particular, the delivery model has generated challenges of communicating across groups (cited by stakeholders interviewed for the PFM and PFNS case studies). As well, maintaining a large number of multi-level partnerships takes resources (cited by stakeholders interviewed for CACL's *Inclusive Education* project).

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<sup>22</sup> As noted in Section 1.1, both ACL and PF have a national body, provincial/territorial counterparts and a large number of community-based chapters.

Some key informants (as discussed in Section 4.1), three of the case studies, and some documents examined by the document review identified limited funding as a disadvantage. For example, MacLeod (2004) pointed towards inadequate overall funding and limited funding for PF as limiting the capacity of the CII to support inclusion.

***It is not clear that an alternative delivery model for the CII would better achieve inclusion goals, although it might be useful to consider experimenting with a more open bid process in the context of a significantly expanded/enriched CII.***

Key informants provided mixed responses to the question of whether alternative delivery models would be better. Key informants from both NGOs were strongly in favour of the CII's delivery model, while key informants who were government officials were divided (with half favouring the adoption of an open competitive bid delivery process – because of its ability to draw in new agencies and new ideas).

To help consider whether alternative models would better achieve inclusion goals, the evaluators contacted program managers at the Pennsylvania Developmental Disabilities Council, which uses a “semi-competitive model”. The Council's experience indicated that competition for grant funds introduced new approaches and encouraged aggressive submissions – but that there were incentives to retain and provide continued support to successful programs. This suggests that an open bid system would only be of value in the context of a significantly expanded CII. Otherwise, switching to a more open bid process could jeopardize community capacity developed over the past seven years.

## **4.2 Participation in Design and Delivery of Activities**

***The evidence indicates that processes of design, delivery and implementation of activities are promoting self-determination by involving people with disabilities, and it might be possible to do even more in this area.***

The document review indicated that CII program documents emphasize that self-determination is a guiding principle of the CII. Both the project census and stakeholder survey indicated that CII projects were involving people with disabilities.

- The project census indicated that 77% of PF projects and 19% of ACL projects use self-advocacy groups to encourage individual self-determination (as discussed in Section 2.2). The project census also showed that many projects (43% of ACL projects and 27% of PF projects) use other self-determination activities (such as open dialogues and focus groups where participants can share personal stories) to encourage self-determination.
- Most (84%) of respondents to the stakeholder survey rated the CII as either “very effective” (46%) or “effective” (38%) in including people with disabilities in all areas of its projects (as discussed in Section 2.3).

Many key informants felt that people with disabilities and their families were being included in the design and implementation of CII projects, but comments from NGO key informants suggest that more could be done in this area. For example, some ACL key informants spoke of “the intent... to engage, empower and encourage participation of people with disabilities”, and one PF key informant felt that there was a difference between theory and practice in this area.

The case study analysis indicated that people with disabilities have participated in the design and implementation of *PAR* and *Project Learning* and in the projects by the six provincial NGOs. It was not clear that people with disabilities have been involved in CACL’s *Inclusive Education* project at the management or operational level, but that the project was focused on system change and policy – rather than on the types of family, community and organizational development that was the focus of most other projects. Two of the four case studies (PFS and PFNS) that included interviews of people with disabilities indicated that those interviewed would like to increase their involvement in the planning and decision making processes.

The Canada-wide interviews of people with disabilities found that 66% of respondents (n=64 of 97 interviewees) indicated that they had helped to plan or put on CII projects, activities, events or workshops (see Table 4.1). When asked to provide details, the most mentioned types of help involved participating in planning (cited by 39 of 97 interviewees) and contributing ideas (cited by 22 of 97 interviewees). When asked to provide additional details on their involvement in CII-supported activities, the most mentioned types of involvement were outreach activities such as giving a speech (cited by 41 of 99 interviewees), organizing/participating in conferences or meetings (cited by 41 of 99 interviewees) and/or participating in workshops (cited by 39 of 99 interviewees).

Table 4.1			
Types of participation in CII-supported projects or activities			
What did you do in X? (n = 99; comments: 167)		Did you help planning or putting on X? If yes, how? (n = 97; comments: 100)	
	#	Responses (Q 6)	#
		Yes	64
		No	33
Comments		Comments (Q 8)	
Gave a speech or presented information to others	41	Participated in planning /planning meetings	39
Organized conferences, participated in CII or community meetings	41	Ideas were used in activities (e.g., speech, subject of entire conference, ideas used to develop plot in a play)	22
Participated in workshops (e.g., listening, learning, hands-on learning)	39	Organized meetings, liaised with members, gathered materials	21
Other (e.g., backstage work, acting, developing and putting together newspapers, documents, welcoming people)	27	Other	18
Provided support for others with disabilities and families with a disabled member	19		

Source: Canada-wide interviews of people with disabilities.

Note: “X” represents all CII activities, events, workshops and projects discussed in the individual interviews (each interview was tailored to the specifics of the individual's experience with the CII).

When asked about their satisfaction with time spent on CII supported activities, 77% (n=57 of 74 interviewees) indicated that the time spent on CII activities was enough or sufficient, while 12% said it was too little and the other 11% said it was too much.

*The evidence indicates that women have been involved in the design, delivery and implementation of the CII, however more needs to be done to increase the representation of members of Aboriginal and ethno-cultural minority communities among participants (with and without disabilities) involved in the design and delivery of CII activities.*

In the project census, respondents reported that the organizing/leading of their projects involved 2,095 women (n=132 projects). The respondents also reported that the organization/leading of their projects involved 75 persons from ethno-cultural minority groups (n=93 projects) and 100 Aboriginal persons (n=34 projects).

The case study analysis, stakeholder survey and key informant analysis provided additional evidence to indicate that women have been involved in the design, delivery and/or implementation of CII. This additional evidence also indicated more needs to be done to increase the representation of Aboriginal and ethno-cultural minority communities among participants involved in the design and delivery of CII activities.



- The stakeholder survey asked respondents who were paid staff or officers of a CII organization, or representatives of government or communities<sup>23</sup> to use a scale of 1 to 5<sup>24</sup> to indicate the level of involvement of various groups in CII projects. Most (89%) of the responding stakeholders (n=104 of 117 respondents) indicated that women were either “highly involved” (57%) or “very involved” (32%). Close to one-third (34%) of the responding stakeholders (n=34 of 100 respondents) felt that Aboriginal persons and ethno-cultural minority groups were either “highly involved” (11%) or “very involved” (23%) – and 6% felt they were “not at all involved”.
- Key informants indicated that significant efforts have been made to include members of both genders and Aboriginal/ethno-cultural minority communities in the design, delivery and/or implementation of the CII. At the same time, the general view was that Aboriginal communities are not well enough represented.
- Most stakeholders interviewed for the case studies were positive about inclusiveness with respect to gender. Most stakeholders interviewed for 8 of the 9 case studies<sup>25</sup> tended to be positive about inclusiveness with respect to ethno-cultural minorities. At the same time, however, several comments suggested that there is a need to consider ways to increase the involvement of Aboriginal people and persons from ethno-cultural minority groups. For example, it was suggested that more money would enable the CLO to reach out to communities in the far north. Similarly, SACL stakeholders spoke of the need for more outreach to Aboriginal and ethno-cultural minority communities.

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<sup>23</sup> For example through a school, health agency of religious organization.

<sup>24</sup> Where 1=not at all, and 5=highly involved.

<sup>25</sup> The exception was CACL’s *Inclusive Education* project.



## 5. Results and Impacts

This section takes a preliminary look at whether the Community Inclusion Initiative (CII) is achieving its intended results and impacts by examining:

- CII activities/projects by region;
- reach (this includes examining how many individuals, organizations and communities have been reached by the CII and how they have been reached);
- evidence of results and outcomes (this includes examining to what extent the CII enlists and mobilizes communities and partnerships; what was learned from self-evaluation processes; whether the CII involvement of individuals, organizations and communities increased inclusion; and whether participants were satisfied with the CII);
- evidence of whether the CII leveraged support from other sources, and evidence of impacts;
- factors contributing to success and sustainability; and
- cost-effectiveness.

### 5.1 CII Activities/Projects by Region

*The project census data for projects during 2003-2004 and 2004-2005 indicated that the largest number of projects was in Ontario (24%), followed by Manitoba and Saskatchewan (14% each) and Newfoundland and Labrador (12%).*

As noted in Section 3.4, the document review indicated that CII documentation did not include a succinct list of projects/activities.

As shown in Table 5.1, the project census data for projects during fiscal years 2003-2004 and 2004-2005 indicated that the largest number of projects was in Ontario (24%), followed by Manitoba and Saskatchewan (14% each) and Newfoundland and Labrador (12%). Alberta, the Northwest Territories and Yukon had the smallest number of projects (1 to 2% each).

<b>Table 5.1</b> <b>Projects by province</b>						
Partner	ACL		PF		Total	
	#	%	#	%	#	%
Alberta	1	1			1	1
British Columbia	14	10	1	5	15	9
Manitoba	21	15	2	9	23	14
New Brunswick	6	4	1	5	7	4
Newfoundland and Labrador	17	12	3	14	20	12
Nova Scotia	12	9	2	9	14	9
Northwest Territories	3	2	1	5	4	2
Ontario	31	22	8	36	39	24
Prince Edward Island	4	3	1	5	5	3
Québec	10	7			10	6
Saskatchewan	21	15	2	9	23	14
Yukon	1	1	1	5	2	1
<b>Total</b>	<b>141</b>	<b>100</b>	<b>22</b>	<b>100</b>	<b>163</b>	<b>100</b>
Source: Project census for fiscal years 2003-2004 and 2004-2005.						

The evaluation was unable to explore types of activities by region (although an overall picture of the types of activities is shown in Tables 2.2 and 5.8).

*The document review suggests that the proposal approval process is one factor explaining variances in the types/number/scales of CII activities.*

The document review noted that the 2004 *Transforming Communities Report* identified the proposal approval process at the provincial/territorial steering committee level as an important factor in determining the characteristics of CII-related activities. The approval process is guided by criteria emphasizing priority areas that can vary depending on the year and jurisdiction.<sup>26</sup>

<sup>26</sup> The question of whether effectiveness is correlated with the number/types of activities is examined in Section 5.3. Section 5.5 examines what factors incorporated into CII project objectives and processes have aided the success and sustainability of CII efforts.

## 5.2 Reach

*Estimates of reach have not been systematically implemented in CII monitoring or reporting, however evidence from the evaluation study indicates that estimates of reach (direct and indirect) are 60,000.*

The document review indicated that measures of reach have not been systematically implemented by CII monitoring or reporting, although some information is available. For example, the 2004 *National Partners' Meeting Report* indicated a total of 470 communities involved in the CII, 800 community organizations active in projects, 300 local, provincial/territorial and federal departments engaged, and 2,500 families and 5,000 people with disabilities involved in activities. These figures represent an estimate of reach in one calendar year.

The project census indicated that a total of 77,327 individuals were directly reached through 142 CII projects during 2003-2004 and 2004-2005. The majority (61,040 or 79%) were general members of the community. A large number (30,839 or 40%) were volunteer organizers without disabilities, while 11,387 (or 15%) were volunteer organizers with disabilities. It is important to note that some of these individuals would have participated in more than one project. Discounting these numbers by 25% (based on information obtained in the project census), the evaluators suggested that total reach for these projects would be estimated to be “over 60,000”.

**Table 5.2**  
**Number and types of participants directly reached by the project**

Partner	ACL		PF		Total	
	# Reached	# Projects	# Reached	Total # Projects	# Reached	# Projects
# volunteer organizers with intellectual disabilities	9,875	128	1,512	20	11,387	148
# volunteer organizers without intellectual disabilities	30,455	121	384	18	30,839	139
# volunteer family members or caregivers of individuals with intellectual disabilities	11,095	124	236	16	11,331	140
# persons from partner organizations with intellectual disabilities	646	112	56	15	702	127
# persons from partner organizations without intellectual disabilities	5,369	125	266	16	5,635	141
# general members of the community	60,736	110	304	15	61,040	125
# other persons (e.g., municipal, provincial /territorial and federal government staff)	7,894	101	23	16	7,917	117
# of individuals in total involved in organizing-leading the project	74,641	124	2,686	18	77,327	142

Source: Project census for fiscal years 2003-2004 and 2004-2005.

The case study analysis and key informant analysis also indicated the extent of reach. For the nine case studies, estimates of reach (direct and indirect) ranged from hundreds to thousands of individuals, depending on the project. Key informants were unable to provide exact estimates of reach, but generally stated that the numbers reached were large.

***The evidence suggests that the strong local structures of the ACL and PF have helped to reach people directly, and that information sharing has been an important avenue for reaching people directly and indirectly.***

The document review cited the 2004 *Transforming Community Report* as an example of evidence that the CII's success in directly influencing people has been achieved through the strong local structures of the ACL and PF.

Key informants felt reach had occurred mainly through symposiums, conferences and other information sharing events. Inclusive education initiatives were frequently cited as a main avenue for reach.

The case study analysis provided additional evidence of reach through *PAR* and *Project Learning*. (This is discussed further in Section 5.3.2).

***The evidence suggests that funding was one of the factors influencing reach.***

The document review found that organizations with greater funding appear to be better able to mobilize resources required to reach a broader audience. In addition, when the project census data were used to conduct statistical (correlation) analysis, the analysis indicated that greater funding for ACL projects was linked to greater reach. The analysis also indicated that:

- the number of municipal partners was positively related to CII funding levels;
- the number of individuals indirectly reached by the CII projects was positively related to CII funding levels and other sources of funding; and
- the number of individuals affected by policy changes as a result of the CII projects was positively related to CII funding levels and in-kind contributions.

The case study analysis and key informant analysis provided further evidence that funding was a factor affecting reach. At the same time, these two sources suggested that reach was also affected by other factors – such as time, geography, human resources, levels of communication, and formal organization.

## **5.3 Evidence of Results and Outcomes**

This section provides a preliminary look at results and outcomes by examining whether the CII has been successful in three main areas: mobilizing communities and partnerships towards the goals of inclusion, developing self-evaluation and new knowledge mechanisms, and facilitating/increasing inclusion. This section also examines whether participants are satisfied with the CII.

### **5.3.1 Mobilizing Communities and Partnerships**

***The evidence suggests that the CII has enlisted and mobilized communities and sponsored NGOs toward the goals of inclusion – and has created new partnerships particularly in the areas of social services and education.***

The document review found that the CII's ability to mobilize communities to support inclusion was evidenced in *PAR* reports. Those reports documented increasing participation levels among communities involved in projects.

The stakeholder survey asked respondents who were paid staff or officers of a CII organization, or representatives of government or communities<sup>27</sup> to use a scale of 1 to 5<sup>28</sup> to indicate their assessment of how many new partnerships for the purposes of inclusion have been created by the CII in each of four areas. As indicated in Table 5.3:

Table 5.3 Number of partnerships created, by affiliation						
	(%)					N
	Few or no partnerships	2	3	4	Many new partnerships	
Education						
CII	8	9	19	34	30	74
Community	14	6	28	25	27	64
Family	5	10	19	33	33	19
Government	0	0	27	27	47	15
Overall	12	7	21	29	31	119
Social services						
CII	4	10	16	40	30	73
Community	10	11	16	36	26	61
Family	5	15	15	30	35	20
Government	0	0	13	47	40	15
Overall	8	9	15	37	31	116
Government						
CII	3	13	28	32	25	69
Community	12	14	28	29	17	58
Family	5	5	21	37	32	19
Government	0	0	29	29	41	17
Overall	8	10	28	29	25	111
Faith/religious groups						
CII	24	29	19	18	10	68
Community	25	29	20	18	8	51
Family	15	25	40	15	5	20
Government	0	30	0	40	30	10
Overall	23	28	18	20	10	99
Source: Survey of stakeholders.						
Note: CII respondents included staff and volunteers of a CII organization. Community respondents included members of schools, health agencies and religious groups. Family respondents are in families of people with disabilities. It should be noted that some respondents identified themselves as being a member of more than one group. Therefore, some double counting occurs in the subgroup analysis, but not in the overall analysis of the respondents.						

<sup>27</sup> For example, through a school, health agency or religious organization.

<sup>28</sup> Where 1= few or no partnerships, and 5=many new partnerships.



- in the case of social services, 68% of the responding stakeholders (n=79 of 116 respondents) indicated that either “many new partnerships” (31%) or a large number of new partnerships (37%) were created by the CII;
- in the case of education, 60% of the responding stakeholders (n=71 of 119 respondents) indicated that either “many new partnerships” (31%) or a large number of new partnerships (29%) were created by the CII; and
- in the case of government, just over half (54%) of the responding stakeholders (n=60 of 111 respondents) indicated that either “many new partnerships” (25%) or a large number of new partnerships (29%) were created by the CII.

All key informant groups emphasized the CII’s success in enlisting and mobilizing communities and partners. The ACL key informants felt that the CII’s achievements have been contingent upon and therefore demonstrate the CII’s capacity to attract new and varied partnerships. The PF key informants noted that the CII has aided PF in enlisting and mobilizing communities and NGOs. ODI officials who were key informants cited the high demand for CII funding both among stakeholder NGOs and others outside of the CII as an indication of the success of the CII in mobilizing communities toward inclusion work. Provincial/territorial officials who were key informants and who had been involved with ACL steering committees felt that their representation on the committees created a key linkage in bringing government and community groups together and aiding the mobilization of communities.

The in-depth analysis conducted by the case studies indicated that CII projects have enlisted and mobilized NGOs and stakeholders. For example, SACL’s “Alliance” has involved a large number of organizations.

***A variety of CII activities were identified as having strengthened community and organizational capacity – in particular, activities that helped to build relationships and networks, activities that provided a forum for community learning, and activities that provided educational opportunities for people with disabilities and other stakeholders.***

The document review found that a wide range of CII activities have strengthened community and organizational capacity. For example, the 2004 *National PAR Report* developed criteria for successful community outcomes. Their key factors included: community building; partnership and coalition building; promotion of self-determination and confidence building of individuals, families and partners; communication; advocacy for policy reforms and system changes; and attainment of long-term resources.

The key informants highlighted the effectiveness of local level partnership and relationship building activities in creating community and organizational capacities. For example, all groups of key informants felt that effective activities involved partnership building and created a sense of public awareness.

The case study analysis suggested that activities that provided a forum for community learning, contributed to building relationships, developed regional networks, and/or provided education opportunities for people with disabilities and other stakeholders, contributed most effectively to strengthening community and organizational capacity.

### **5.3.2 Self-Evaluation and New Knowledge Mechanisms**

As indicated in Section 2.2, **PAR** is a process for self-evaluation that was built into the CII, particularly for the ACL component. It provided for meetings and reports to assess progress, exchange lessons learned and report on results. A similar process was implemented for the PF component – **Project Learning**.

*The evidence indicates that PAR and Project Learning processes have contributed to a better understanding of what works well and what does not work well in the area of inclusion, and that lessons learned have generally been communicated effectively.*

The document review indicated that intention in 1999 was to design a **PAR** approach for the CII to look at the effectiveness of the CII in making community inclusion a reality and to identify the best strategies for community inclusion. The document review found that the rationale for **PAR** as an important component of self-evaluation for the CII is evidenced in the **PAR** reports, including the *National PAR Reports* and events. While smaller in scope, PF's Project Learning also brings many people together.

The first *National PAR Report* in 2000 found that the first two years of the CII highlighted how the initiative had generated significant community activity, but that knowledge on effectiveness and lessons learned was not being transmitted across communities and jurisdictions.

The stakeholder survey looked at several indicators and found that **PAR** and **Project Learning** have contributed to self-evaluation and new knowledge:

- 87% of respondents felt that they or their organization had “learned a lot” (47%) or “quite a bit” (40%) from involvement in **PAR** and **Project Learning**;
- 84% of respondents indicated that their organization had applied lessons learned from **PAR/Project Learning** to improve their work towards inclusion; and.
- 69% of respondents felt that CII projects were either “very effective” (31%) or “effective” (38%) in sharing results with others.

The stakeholder survey also indicated that there was a substantial “ripple effect”. Approximately two-thirds of respondents reported that they had shared information regarding the CII with others during the twelve months prior to the survey (which was conducted in the late summer and early fall of 2005). On average, each respondent indicated sharing their information with over 100 persons during those twelve months.

As shown in Table 5.4, the project census indicated that projects were using a variety of methods to disseminate information, with most of the projects disseminating information through the project itself (83%), **PAR** reports (78%), and other print reports (66%).

Table 5.4 How were the results of this project shared with others?									
Medium	ACL			PF			Total		
	Projects		%	Projects		%	Projects		%
	#	Total		#	Total		#	Total	
Through the project itself **	122	141	87	13	22	59	135	163	83
National/Provincial conference	76	141	54	10	22	46	86	163	53
Through PAR reports *	113	135	84	9	22	41	122	157	78
Through other print reports	96	141	68	12	22	55	108	163	66
Web **	56	141	40	2	22	9	58	163	36
Other	31	141	22	7	22	32	38	163	23
None of the above	1	141	1	0	22	0	1	163	1
Source: Project census for fiscal years 2003-2004 and 2004-2005.									
Note: n=141 for ACL, n=22 for PF, and n=163 for total projects. *p is less than or equal to 0.001. **p is less than or equal to 0.01.									

Both the case study analysis and key informant analysis provided a positive assessment of self-evaluation and the sharing of lessons learned.

- The sharing of lessons learned and new knowledge appeared to occur in all nine case studies, and the methods used appeared to be generally effective.
- The case study analysis indicated that those participating in **PAR** learned about what was going well and what was not going well in inclusion efforts. Drawing data from the project census, the case study analysis estimated that **PAR** initially reached over 400 persons between 2003 and 2004<sup>29</sup> (that is, excluding any additional distribution of reports or Web access).
- In the case of **Project Learning**, it appears that the focus was on how each jurisdiction could improve their work. Drawing data from the project census, the case study analysis indicated that the 2005 **Project Learning** conference reached 34 persons directly and an additional 120 persons indirectly.
- Key informants felt that the yield **PAR** provided in terms of lessons learned was well worth the cost. In general, most key informants felt that lessons were being learned and communicated.

<sup>29</sup> Specifically the project census indicated that 78 persons were involved in organizing PAR, 175 persons were directly reached, and 250 were indirectly reached when reports were distributed nationally.

*It appears that self-evaluation through PAR involved substantial investment.*

The key informant analysis suggested the **PAR** required substantial investment. In addition, the evaluators who observed two **PAR** events as part of the case study analysis noted that stakeholders and participants had invested time and energy in **PAR**.

*A number of ways were identified to make more effective use of the self-evaluation and lessons learned processes (i.e. PAR and Project Learning).*

The case study analysis and key informant analysis identified the following as ways to improve information/knowledge sharing processes:

- key informants suggested that better use could be made of **PAR** by having more time to go through/share self-evaluation results and lessons learned at **PAR** events, spending more funds on analysis, and improving the process itself;
- individual key informants also identified a number of ways to improve communications, such as doing more to communicate the CII at the provincial/territorial level and using media more effectively;
- the case study analysis indicated that there appears to be a need to increase the awareness and involvement of people with disabilities in the self-evaluation process; and
- the case study analysis indicated that a mix of methods were being used to share lessons learned and new knowledge, rather than a similar set of methods across NGOs. The success of some of these methods suggests that they could be used by other NGOs and projects to improve the sharing of lessons learned and new knowledge.

In addition, MacLeod (2004) noted that more use could be made of Websites to share information across the country. Project census data (Table 5.4) indicated that only 36% of the projects in fiscal years 2003-2004 and 2004-2005 shared their results with others through the Internet.

### **5.3.3 Facilitating/Increasing Inclusion**

*A range of results were identified in the case of participants with and without disabilities, including self-growth, increased social/community connections, increased access to community services and improved quality of life.*

The document review noted that a wide variety of positive CII results are shown in activity reports, National **PAR** Reports and other publications and event proceedings. Examples of results include reducing isolation and increasing the level of trust and respect among players, providing a process to enable people to become involved in addressing disability issues, identifying a process to foster relationships and develop allies, acting as a catalyst, and responding to diverse needs and priorities identified by families, individuals and communities.

Most key informants felt that one of the most important results was self-growth of participants in a variety of roles. (e.g. leadership development, self-advocacy, informed parents). They felt that other results included changes in government policy, less isolation, and recognition of PF and its members by other organizations.

Project leaders providing the responses to the project census indicated that the most significant results of the CII projects were in networking, collaboration, information sharing, education, empowerment, inclusion and employment.

The case study also identified a range of results for direct participants in the CII. In the case of people with disabilities, projects typically resulted in higher levels of self-confidence and new skills development, meeting new friends, and increased awareness and learning through project involvement and through attending meetings/events.

In the case of the Canada-wide interviews of people with disabilities (see Table 5.5), almost all respondents indicated that they had learned new things through the CII (96%, or n=92 of 96 interviewees) and met new people (85%, or n=82 of 96 interviewees). Almost two-thirds (63%, or n=49 of 78 interviewees) indicated that they had learned about different organizations.

<div>Table 5.5</div> <div>Views on the more immediate results of CII-supported activities</div>					
Learned new things (n = 96; Comments: 118)		Met new friends (n = 96; Comments: 67)		Learned about differing organizations (n = 78; Comments: 31)	
	#		#		#
Yes	92	Yes	82	Yes	49
No	4	No (or not yet)	8	No	29
		Met acquaintances rather than friends	6		
Comments		Comments		Comments	
Public speaking/ Improved interactions with people (e.g., speaking up, talking in public, getting my points across)	54	--- Associated with "yes" (e.g., more friends, tons, not a lot, a couple, my partner, a lot, friends and people, happy to be involved)	44	-- Associated with "yes" (e.g., met people in schools, helped me to talk to organizations, opened the doors, municipal/ community service people who could help me)	21
Learned about issues (e.g., what is happening in Canada, leadership, rights, standing up, challenges faced by people with intellectual disabilities, seniors, people living in institutions, abuse)	30	-- Associated with "no" (already had friends in the PFC, hard to know people when you meet only a few times a year)	4	-- Associated with "no" (e.g., already knew about or worked with other organizations, the focus was on learning how to present)	10
New skills (e.g., acting, using puppets, video, putting together a manual)	20	-- Associated with acquaintances (e.g. shoulder to lean on for help or advice)	6		
Other (many things, what works and what doesn't)	14	-- Associated with "not yet." (hoping new people will join and come to the meetings, not activities haven't started yet)	13		
Source: Canada-wide survey of people with disabilities.					

The stakeholder survey indicated that:

- Seventy-five percent of responding stakeholders (n=139 of 185) felt that the CII had been "very effective" (38%) or "effective" (37%) in meeting the needs of family members/caregivers of people with disabilities. The rating by family members (36% "very effective", and 38% "effective") was similar to the rating by all respondents.

- Fifty-four percent of respondents who had a family member with an intellectual disability (n=33 of 61) indicated that they felt either “much more supported” (26%) or “more supported” (28%) as a result of their involvement in the CII. Fifteen percent felt “no change in support”.
- Just over half (51%) of respondents who had a family member with an intellectual disability (n=31 of 61) felt that access to community services by family members with disabilities had either “improved greatly” (20%) or “improved” (31%) as a result of the CII. Twenty percent felt there was no improvement.<sup>30</sup>

*The evidence indicates that involvement of individuals, organizations and communities in the CII has increased inclusion, although it should be recalled that no single definition of “inclusion” is being used.*

Most of the key informants felt that the CII has significantly increased inclusion. Similarly, most of the respondents to the stakeholder survey rated the CII as successful in increasing inclusion.

- When asked to rate the success of the CII in facilitating community inclusion, over three quarters (77%) rated the CII as being either “very successful” (38%) or “successful” (39%) (as indicated in Table 5.6).

<b>Table 5.6</b> <b>Overall success of the CII in facilitating community inclusion, by affiliation</b>						
	(%)					N
	Not at all successful	2	3	4	Very successful	
CII	0	6	11	39	45	127
Community	1	9	19	39	32	117
Family	0	10	15	42	32	59
Government	4	4	15	41	37	27
<b>Overall</b>	<b>0</b>	<b>7</b>	<b>16</b>	<b>39</b>	<b>38</b>	<b>217</b>
Source: Survey of stakeholders.  Note: CII respondents included staff and volunteers of a CII organization. Community respondents included members of schools, health agencies and religious groups. Family respondents are in families of people with disabilities. It should be noted that some respondents identified themselves as being a member of more than one group. Therefore, some double counting occurs in the subgroup analysis, but not in the overall analysis of the respondents.						

<sup>30</sup> Note that the size of this family subsample (n=61) was too small to explore whether these ratings varied by province/territory or by other specific circumstances. Since the stakeholder survey collected information on the affiliation, it is possible to examine the affiliation of the respondents who had a family member with an intellectual disability and who responded to this question. These data indicate that 25% (or n=7 of 28) of the respondents in this family subsample who identified themselves as affiliated with the community felt that the CII had not improved access to services, while 14% (or n=6 of 44) of the respondents in this family subsample who identified themselves as affiliated with an CII organization felt that the CII had not improved access to services. It is important to emphasize, however, that these results can only be considered to be indicative and should be interpreted with considerable caution because of the small sample sizes.

- When asked to rate the effectiveness of CII *projects* in facilitating the inclusion of people with disabilities, 85% rated the projects as being either “very effective” (58%) or “effective” (27%). Only 1% of the respondents felt that the projects were “not effective”.

The project census indicated that almost all of the projects were rated as either “excellent” (48%) or “good” (39%) in affecting inclusion.

All nine case studies provided evidence of how CII involvement has increased inclusion. For example, the case studies for the three provincial PF NGOs provided examples of how CII projects helped develop new life skills and self-confidence.

In the case of the Canada-wide interviews of people with disabilities (see Table 5.7), most (89%, or n=75 of 84) of the interviewees indicated that the CII activity or activities they participated in helped them to feel included. As well, most of the interviewees (84%, or n=68 of 81) felt that there had been a change because of the CII supported activity. The most frequently cited changes were personal growth (cited by 38 of 81 interviewees) and changes in the community (cited by 23 of 81 interviewees).

Table 5.7 Views on the Longer-Term or Systemic Impacts of CII Supported Activities			
Did the CII activity or activities help you feel included? How?*(n = 84; Comments: 69)		Did anything happen or change because of the CII supported activity?(n = 81; Comments: 81)	
	#		#
Yes	75	Yes	68
Unclear or limited impact	5	No (or not yet)	8
Felt included already	4	Maybe	5
Comments		Comments	
<b>Felt like I had contributed</b> (e.g., informed people, showed them what our lives were like, worked together with community)	30	<b>Personal growth</b> (e.g., new skills, increased self-confidence, new job)	38
<b>Helped me do more</b> (get along or deal with people).	23	<b>Changes in the community</b> (e.g., increased access to information, organizations, change in how family/employer viewed participant, P/T interest in self-advocacy model; school division adopted an inclusiveness policy, more people are joining in)	23
<b>More is required</b> (either more activities or expanded activities)	6		
<b>Learned new things</b>	3		
<b>Sense of community is very important/more pride of community</b>	2	<b>Other</b> (Some changes, but more is required)	20
<b>Other</b> (yes, but not immediately, over time; yes in many different communities)	5		

Source: Canada-wide survey of people with disabilities.



*Views were mixed on whether effectiveness is correlated with the number/types of activities, however the project census suggests that projects in the areas of leadership, social networks/supports and self-advocacy/rights have been most effective.*

Views were mixed on whether effectiveness is correlated with the number/types of activities, with several ACL key informants saying yes and several ACL key informants and both ODI key informants saying no.

Looking at the various types of projects (see Table 5.8) indicated that 70% or more of ACL's projects in the areas of leadership, social networks/supports and self-advocacy/rights were rated as "excellent" in affecting inclusion. In the case of PF's projects, all projects in the area of social networks/supports were rated as "excellent".

<b>Table 5.8</b>						
<b>Success of projects by type of project</b>						
	<b>% Poor</b>	<b>% Somewhat poor</b>	<b>% In-between</b>	<b>% Good</b>	<b>% Excellent</b>	<b># Projects</b>
<b>ACL</b>						
Awareness				50	50	6
Community Living/Inclusion			5	50	45	22
Self-Advocacy/Rights				21	79	14
Leadership					100	8
Family/Parenting			8	50	42	12
Youth/Inclusion	9			55	36	11
Social Networks/Support		10		20	70	10
Education/Literacy			7	60	33	15
Employment				50	50	8
Fetal Alcohol Syndrome				100		1
Research				70	30	10
Other		8		25	67	12
<b>Number of Projects</b>	<b>1</b>	<b>2</b>	<b>2</b>	<b>43</b>	<b>53</b>	<b>129</b>
<b>PF</b>						
Awareness				50	50	2
Community Living/Inclusion				40	60	5
Self-Advocacy/Rights				100		2
Leadership				100		2
Family/Parenting						
Youth/Inclusion						
Social Networks/Support					100	3
Education/Literacy			25	50	25	4
Employment						
Fetal Alcohol Syndrome						
Research						
Other			33		67	3
<b>Number of Projects</b>			<b>2</b>	<b>9</b>	<b>10</b>	<b>21</b>
Source: Project census for fiscal years 2003-2004 and 2004-2005.						

### 5.3.4 Participant Satisfaction

*The evidence indicates a high level of satisfaction with the CII.*

The stakeholder survey indicated that most (81%) of respondents were either “very satisfied” (47%) or “satisfied” (34%) with the CII. Three percent indicated that they were “not satisfied”. Families and community stakeholders were somewhat less satisfied than the other two groups.<sup>31</sup>

The key informant analysis also indicated that satisfaction was high. Two ODI key informants felt that leadership development had the highest impact on participants’ satisfaction. Similarly, three of the PF key informants spoke of the satisfaction gained from being an equal partner at the table or assuming a leadership role.

The case study analysis also suggested that most participants were either very satisfied or satisfied.

The Canada-wide interviews of people with disabilities indicated that:

- just over three-quarters (78%, or n=69 of 89) of interviewees said that they would do their CII activities again without reservation, another 9% (n=8 of 89 interviewees) said “yes, but with some qualifications”, and the other 13% (n=12 of 89 interviewees) said “not right now”;
- when interviewees were asked what they liked about CII activities, the most frequently cited answers were the opportunity to meet new people, participate or improve relations (cited by 59 of 92 interviewees), getting out and/or doing things (cited by 44 of 92 interviewees), having a sense of accomplishment (cited by 25 of 92 interviewees), and learning new things (cited by 19 of 92 interviewees); and
- when interviewees were asked what they disliked about CII activities, the most frequently cited answers were limited project funding (cited by 27 of 91 interviewees), transportation-related aspects (e.g., costs or scarcity of public transit, unwillingness or incapacity of caregivers to transport people) (cited by 18 of 91 interviewees), and scarcity of volunteers (cited by 9 of 91 interviewees).

## 5.4 Evidence of Leveraging and Impacts

*The evidence suggests that many projects have leveraged funding and/or in-kind support (such as time or expertise) from other sources.*

The document review noted that the 2004 *National Partners’ Report* stated that \$3.5 million has been leveraged by the CII since 1997 in addition to in-kind and volunteer time.

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<sup>31</sup> Seventy-three percent of families were either “very satisfied” or “satisfied”. Seventy-six percent of community stakeholders were either “very satisfied” or “satisfied”.

As shown in Table 5.9, the project census data for projects during 2003-2004 and 2004-2005 indicated that over half (56%) of the projects reported receiving in-kind contributions, 22% reported receiving additional funding from other NGOs, and 19% reported receiving additional funding from provincial/territorial governments. Just over one-quarter (27%) of projects reported receiving no additional funding (17% of ACL projects, and 59% of PF projects).

<b>Table 5.9</b> <b>Funding from sources other than CII</b>			
Source of alternate funding	% Projects		
	ACL	PF	Total
Provincial/Territorial **	25	0	19
Municipal government	5	0	4
In-kind contributions *	65	27	56
Non-profit organizations **	29	0	22
Corporate funding	6	0	5
Other sources ***	23	0	18
<b>No additional funding received ***</b>	<b>17</b>	<b>59</b>	<b>27</b>
Source: Project census for fiscal years 2003-2004 and 2004-2005. *p is less than or equal to 0.001. **p is less than or equal to 0.01. ***p is less than or equal to 0.025.			

As shown in Table 5.10, the project census data also showed that a total of \$4.9 million in projects' budgets came from the CII, \$1.5 million came from other sources, and approximately \$0.7 million came from in-kind contributions during the two years examined by the project census. It could be assumed that these amounts are under-estimates because not all project leaders provided answers to these budget questions.

<b>Table 5.10</b> <b>Budget for fiscal years 2003-2004 through to 2004-2005, by source</b>						
Source	ACL		PF		Total	
	Sum	# Projects	Sum	Total # Projects	Sum	# Projects
SDC/CII	4,581,415	133	348,319	21	4,929,734	154
Other sources	1,542,554	112	0	15	1,542,554	127
In-kind contributions	631,484	111	21,440	17	652,924	128
Source: Project census for fiscal years 2003-2004 and 2004-2005.						

Looking at average amounts, the project census data indicated that CII projects received the majority of their funding from the CII. The average amount of CII funding was approximately \$32,000 (median=\$12,250) per project (with a range from \$0 to \$300,000). Funding from other sources averaged \$12,100 (median=\$100) per project (with a range from \$0 to \$250,000). In-kind contributions were estimated to average approximately \$5,100 (median=\$450) per project (with a range from \$0 to \$120,000).

The case study analysis also indicated that the provincial NGOs were leveraging time and/or funding. For example, the case study of AACL found that building partnerships with NGOs and governments was emphasized as an objective in the design of AACL projects. Stakeholders interviewed as part of the AACL case study generally viewed the AACL as successful in leveraging funding and other support.

Most key informants felt that leveraging was taking place, although the extent was not clear to them. ACL and PF key informants felt that some leveraging had been realized, although they did not see leveraging as a central goal or indicator of success. The ACL key informants felt that leveraging works best when local partnerships have been developed.

***The available evidence suggests that duplication of the CII with other programs is probably not an issue.***

The possibility of duplication of the CII with other programs was examined by the document review and the key informant analysis. The document review found that the issue of overlap and duplication among the three levels of government was not raised in the reviewed documents. The key informants did not feel that duplication of effort was an issue.

As well, the evaluators would consider the following process information to provide additional evidence to support the finding that duplication of the CII with other programs is probably not an issue.

- As noted in Section 5.3.1, provincial officials have been involved in the steering committees. This type of involvement could be expected to help minimize the chances of duplication of CII with other programs.
- As noted in Section 4.1, respect and relevance to jurisdiction is one of the criteria included in the project approval processes used by ACL and PF organizations.
- As noted in Section 5.3.1, the evidence that new partnerships were created by the CII included new partnerships with government, which suggests that governments are often directly involved in CII-funded activities.

***Although robust measures of the impact of the CII on inclusion are not available, evidence from the formative evaluation suggests that the CII has achieved improvements in inclusion that would not have occurred in the absence of the initiative.***

The document review indicated that program impacts were not well documented in the reviewed materials.

Although the formative evaluation of the CII was not designed to measure/estimate the impact of the CII,<sup>32</sup> the evaluation has provided the following evidence to suggest that the CII has achieved some impacts on inclusion.

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<sup>32</sup> The measurement/estimation of impacts is typically the focus of a summative evaluation.

- As discussed under Section 5.3.1, the document review, key informant analysis and case study analysis suggested that the CII has enlisted and mobilized communities and sponsored NGOs toward the goal of inclusion. In addition, the stakeholder survey suggests that the CII has created many new partnerships, particularly in the areas of social services and education.
- As discussed above, evidence from the project census, case study analysis and key informant analysis suggests that many projects have leveraged funding and/or in-kind support (such as expertise) from other sources.
- The Canada-wide interviews of people with disabilities suggested that almost all of the respondents were learning new things through the CII. In addition, 89% of the respondents indicated that the CII activities which they had participated in made them feel included, and 84% of the respondents felt that there had been a change because of the CII-supported activity (as discussed in Section 5.3.3).
- Key informants generally felt that the CII had resulted in changes in inclusion that would not have occurred without the program. For example, ACL key informants felt that the CII was successful or very successful in adding to existing efforts. They also felt that without the CII seed funding, the inclusion activities developed under the CII would not have happened. PF key informants agreed that CII funding raised the level of activity in the community.

## 5.5 Factors Aiding Success and Sustainability

*The evidence indicates that a number of factors incorporated into CII project objectives and processes have aided the success of CII, particularly the flexibility of the framework and the emphasis on identifying community needs, involving people with disabilities and building partnerships.*

The document review noted that the 2004 *National PAR Report* highlighted six key factors of success in the communities profiled by the **PAR** team: community building; partnership and coalition building; promotion of self-determination and confidence building of individuals, families and other partners; communications; advocacy for policy reforms and systems changes, and attainment of long-term resources.

The key informant analysis and case study analysis:

- highlighted the importance of flexibility (as noted in Section 2.3);
- highlighted the importance of involving communities and people with disabilities in the identification of projects (as noted in Section 4.1); and
- highlighted the importance of partnerships.

Statistical (correlation) analysis of the project census data suggests that the types and number of partners might be a factor influencing the success of CII funded efforts. In particular, project success was positively related to the number of health-related community agencies involved as partners<sup>33</sup> and the number of “other voluntary organizations”<sup>34</sup> involved as partners. In addition, the number of health-related community agencies involved in the project was positively correlated to in-kind contributions.

***Data collected by the project census indicated that some projects built on the work of prior projects and that some projects continued after CII funding ended.***

Data collected by the project census indicated that 83 (59%) of the projects in fiscal years 2003-2004 and 2004-2005 built on the work of a prior project. Although this figure was different for ACL and PF projects (57% and 67%, respectively), the difference was not significant.

At the time of the project census (May and June, 2005), 89 (56%) of the projects continued after CII funding ended. In this case, the difference between ACL and PF projects was significant – with 65% of ACL projects continuing after CII funding ended, compared to 29% of PF projects.

When interpreting these findings, it should be noted that not all CII-funded projects were intended to be sustained.

***Leveraging, funding and community buy-in were identified as keys to sustainability.***

Regarding how projects were sustained, 19% of the sustained projects continued to receive funding from non-profit organizations, 9% received funding from government (federal, provincial and/or municipal), and 6% received in-kind contributions.

The case study analysis indicated that partnerships and leveraging were contributing to the sustainability of some projects (in the case of ACL NGOs), but the other projects could not or were not likely to be sustained without CII funding.

Key informants generally felt that funding was essential, and that community buy-in was the key to sustainability.

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<sup>33</sup> When asked to identify partners that were community agencies, respondents were asked specifically to identify the number of community agency partners that were “school-related”, “health-related” and “other”. These health-related partners would not have included government organizations or voluntary organizations that were health-related.

<sup>34</sup> When asked to identify partners that were voluntary organizations, respondents were asked specifically to identify the number of voluntary organization partners that were “church/religious”, “media-related” and “other”.

## 5.6 Cost-Effectiveness

*Although robust measures of the cost-effectiveness of the CII are not available, the evidence from the formative evaluation suggests that the CII is providing value for money.*

The stakeholder survey indicated that 86% of respondents rated the CII as either “very cost-effective” (60%) or “cost-effective” (26%). Only 1% felt that the CII was “not cost-effective”. Using effective use of volunteers as an indicator of cost-effectiveness showed that 85% of respondents rated the CII as either “very effective” (48%) or “effective” (37%) in the use of volunteers.

Both the key informant analysis and the case study analysis suggested that the CII is providing value for money. Many key informants (8 of 19) as well as stakeholders interviewed as part of the case study analysis felt that the CII was achieving much with modest amounts of money. Other key informants emphasized the CII’s catalyst effects in creating community partnerships and spin-offs.

Several key informants identified partnerships, the use of volunteers, and in-kind contributions as greatly aiding the CII’s cost-effectiveness. The case study analysis also identified partnerships and volunteers as aiding cost-effectiveness. In the case study analysis, the leveraging of funds from other sources was identified as another factor contributing to the CII’s cost-effectiveness.





## 6. Conclusions

This section highlights the overall conclusions for each of the evaluation issues and identifies key areas for review/improvement.

### 6.1 Overall Conclusions

#### **Issue 1: Are the CII's rationale, goal and key activities still relevant?**

Some aspects of the CII have evolved since 1997. For example, the project funding period was increased from one year to three years, the CII's steering committee roles were devolved to the provincial/territorial level, and the CII has evolved towards certain themes and making systemic changes (such as in the areas of child welfare and education).

The evidence indicates that the CII continued to be relevant and to address the real inclusion needs and priorities of people with disabilities.

- The document review, key informants and interviews of people with disabilities indicated that the CII continued to be relevant to federal and provincial governments.
- Key informants from ACL and PF organizations indicated that the CII was very important to the work of their organizations. Most (89%) respondents to the stakeholder survey felt that the CII was “very important” in achieving inclusion.
- Both the project census and case study analysis indicated that NGO projects and activities were in line with the CII's inclusion objectives.
- The flexibility of the CII's framework and the processes used to identify projects were cited as factors that help the CII to address the real inclusion needs and priorities of people with disabilities.

#### **Issue 2: Are the CII's terms, targets and objectives clear and measurable?**

Most key stakeholders probably have a good understanding of the CII, but there is less understanding of the CII at the regional and local levels and among people with disabilities.

Better processes are needed to facilitate information reporting and data collection, and to provide consistent data that are clearly linked to measuring achievements/progress based on objectives.

- The document review and key informant interviews with government officials suggested that information collection/reporting has met federal standards for accountability for the use of funds – but that this has involved considerable effort.

- A variety of ways are being used to define key terms such as “organizational capacity”, “community capacity” and “inclusion”. On one hand this flexibility in language may aid the CII in allowing projects to reach their objectives, but on the other hand it can add some confusion/complexity when communicating with partners and when attempting to assess/report on results/impacts.
- The evidence (provided by the document review, project census and case studies) indicates that the CII’s targets are not well-defined in terms of reach and expected results.

### **Issue 3: What are the strengths and weaknesses of the CII’s design, delivery and implementation?**

A number of strengths were identified.

- Key informants generally felt that the CII distribution of funds by organization and jurisdiction was transparent and well-communicated.
- The CII delivery model was identified as having a number of advantages in mobilizing communities and partnerships. For example, the delivery model is able to foster partnerships, its flexibility allows for the identification of needs at the local level, and its three-year funding period for projects enables project planning.
- The document review, project census, case study analysis and key informant analysis indicated that project funding decisions reflect CII priorities.
- The design and delivery of CII-funded projects/activities promote self-determination by involving people with disabilities in these processes, and it might be possible to do even more in this area.
- Other strengths include the funding of types of activities that contributed effectively to strengthening community and organizational capacity, and the sharing of lessons learned and new knowledge about ways to increase inclusion (as discussed under issue 4, below).

*A number of weakness or disadvantages were identified.*

- Reporting requirements can be a burden for NGOs. At the same time, however, there is always a need to track the proportion of the CII budget that goes to administration.
- Some communication challenges were cited (e.g. communicating across various groups).
- More could be done to increase the representation of members of Aboriginal and ethno-cultural minority communities among participants involved in the design and delivery of CII activities.
- More could be done to make further use of self-evaluation and lessons-learned processes (as discussed under issue 4, below).

#### Issue 4: Is the CII achieving its intended results and impacts?

Although estimates of reach have not been systematically implemented in CII monitoring or reporting, evidence indicates that estimates of reach are substantial. Data from the project census were used to estimate that 142 CII projects during 2003-2004 and 2004-2005 directly reached over 60,000 individuals. The evidence suggests that the strong local structures of the ACL and PF have helped to reach people directly, and that information sharing has been an important avenue for reaching people both directly and indirectly. The evidence also suggests that funding was one of the factors influencing reach. Other factors identified as influencing reach included levels of communication and formal organization.

The formative evaluation also took a preliminary look at results and outcomes in three main areas.

- The evidence suggests that the CII has been able to ***mobilize communities and partnerships***. For example, evidence drawn from the stakeholder survey indicates that the CII has created many new partnerships, particularly in the areas of social services and education. Evidence from the document review, key informants and case studies suggests that community and organizational capacity have been strengthened by CII-funded activities. The CII activities identified as most effective in strengthening community and organizational capacity were activities that helped to build relationships and networks, activities that provided a forum for community learning, and activities that provided educational opportunities for people with disabilities and other stakeholders.
- The evidence indicates that the CII has contributed to the process of ***determining and sharing lessons learned and new knowledge*** about efforts to increase inclusion. In particular, ***PAR*** and ***Project Learning*** have contributed to a better understanding of what works well and what does not work well. At the same time, however, a number of ways were identified to make more effective use of the self-evaluation and lessons-learned processes such as increasing the involvement of people with disabilities and identifying additional ways to share and distribute lessons learned.
- The evidence suggests that CII involvement has ***facilitated/increased inclusion***. For example, a range of results were identified in the case of participants with disabilities, including self-growth, increased social/community connections, increased access to community services and improved quality of life. Most key informants and over three-quarters (77%) of respondents to the stakeholder survey felt that CII has been successful in facilitating community inclusion. Projects in the areas of leadership, social networks/supports and self-advocacy appear to have been the most effective.

Although robust measures of impacts are not available, evidence from the formative evaluation suggests that the CII has resulted in changes in inclusion that would not have occurred without the program. For example, many projects have leveraged funding and/or in-kind support from other sources. In addition, the CII appears to have created many new partnerships, and the Canada-wide interviews of people with disabilities indicated that most (84%) of the interviewees felt that a change had occurred because of the CII activity they had been involved in. As well, key informants felt that the CII was successful or very successful in adding to existing efforts.

There is a high level of satisfaction with the CII. The stakeholder survey indicated that most (81%) of respondents were either “very satisfied” (47%) or “satisfied” (34%) with the CII. The Canada-wide interviews of people with disabilities indicated that just over three-quarters (78%) of the interviewees said they would participate in the CII activities again without reservation.

Although robust measures of cost-effectiveness are not available, evidence from the formative evaluation suggests that the CII is providing value for money. For example, the stakeholder survey indicated that 86% of respondents rate the CII as either “very cost-effective” (60%) or “cost-effective” (26%). Many key informants (8 of 19) and stakeholders interviewed as part of the case study analysis emphasized that the CII was achieving much with modest amounts of money. Several key informants identified partnerships, the use of volunteers and in-kind contributions as greatly aiding the CII’s cost-effectiveness.

## **6.2 Areas Identified For Review/Improvement**

- There is a need to develop ways to facilitate and improve data collection and information reporting.
- The evaluation indicated that it would be useful to consider/identify ways to:
  - increase understanding of the CII at the regional and local levels;
  - add to the involvement of people with disabilities, and increase the representation of members of Aboriginal and ethno-cultural minority communities in the design and delivery of CII funded activities; and
  - make further use of self-evaluation and lessons-learned processes.

# Annex A

## Logic Model for Social Development Partnerships Program

