

Filling the Gap

Keeping Good Work Going

**Research Findings and Recommendations Regarding
Voluntary Sector Project Sustainability in Atlantic Canada**

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for**

The Brother T.I. Murphy Learning Resource Centre Inc.

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A Word About the Authors

The Brother T.I. Murphy Learning Resource Centre Inc. (the Murphy Centre) of St. John's NL is a nonprofit, charitable organization that was established in 1986 by the Congregation of Christian Brothers to provide alternative educational and learning opportunities to youth who had dropped out of school and wished to finish their education.

The Murphy Centre has evolved into a unique organization offering a wide range of opportunities for participants within a framework that includes academic, employment and lifestyle education services. The following mission and philosophy guide the Murphy Centre:

Within a challenging and respectful environment, the Murphy Centre provides individuals with opportunities for growth through the integration of creative learning experiences designed to achieve academic, career and life goals.

The Murphy Centre recognizes the immeasurable worth of all individuals and believes in their ability to make positive changes in their lives.

Acknowledgements

The Brother T.I. Murphy Learning Resource Centre Inc. wishes to thank the voluntary sector organizations and their representatives throughout Atlantic Canada who participated in this research project (see page 11 for a complete list). Their contributions are deeply appreciated.

We thank our project researcher and writer Bruce Pearce, our facilitator Cathy Wright, and our advisory committee member Fiona Chin-Yee.

In addition, we thank the many organizations whose research on project sustainability have strengthened the foundations of this report and provided valuable insights.

We also acknowledge the financial support of Health Canada through the Population Health Fund which made this project possible.

Introduction - Purpose and Scope of Research

This research report explores the theme of project sustainability in the voluntary, community-based sector in Atlantic Canada – with a particular focus on what can be learned from the available literature and from those who have first-hand experience with this issue.

It is the contention of the research proponent that the issue of project sustainability is under studied and that there is no clear strategy available to assist organizations in enhancing sustainability. Many organizations are struggling to keep good work going beyond the initial project pilot or start-up phase. Funders, project partners and communities are also grappling with this issue and are seeking information to help guide them. It is recognized that there is a positive link between a healthy voluntary sector and increased capacity to address labour market needs.

While there is a significant overlap between the themes of 'project sustainability' and 'voluntary sector sustainability,' the scope of this research is limited primarily to projects themselves within the larger voluntary sector context (the latter being the subject of extensive research and policy reviews through such complementary activities as the Voluntary Sector Initiative).

Sustainability is achieved when a project continues to address identified assets/gaps in the community, reinforces the sponsoring organization's mission, and the services provided are integrated into existing services.

The author hopes that this study will enhance our understanding of project sustainability – including related factors, challenges, effective practices and insights into the skills, resources, tools and strategies which may be applied in future work on this subject.

It is further hoped that this report will generate dialogue within and across sectors and that its recommendations will promote action-oriented approaches to enhancing project sustainability within Atlantic Canada and across Canada.

Executive Summary

This report and the research underlying it are intended to help nonprofit, voluntary organizations in Atlantic Canada make project sustainability a practical, rather than a theoretical, endeavour.

As a result, the research in this report draws extensively from the actual experiences of community organizations who are striving to keep good work going – they know the issues best. Their views – combined with the existing literature on the subject – provide a rich resource to assist stakeholders in developing more effective practices for improving project sustainability.

The report is timely – coming more than a decade after governments and other funders of the voluntary sector shifted primarily to short-term, project-based funding. What has been learned about the effectiveness of this approach? What new approaches can we employ to keep good work going in this environment? What needs to be done differently?

Organizations have become creative in finding ways to ensure that each project brings some resources to the organization as a whole; more often than not, research participants noted that the balance sheet works the other way – that they contribute “in kind” resources from their core operations to all projects they undertake, creating strong limbs but a weak heart. Research participants report that this practice is not sustainable, and it threatens organizations as a whole over the long term, including the projects they deliver.

Perspectives on sustainability vary depending on one's vantage point. Unfortunately, the discussion is too often framed within a narrow organizational context – in which sustainability is about organizational survival.

However, this report promotes a broader definition of project sustainability – one in which projects are part of the overall life and well-being of the community – wherein far more than the organization is being sustained.

Sustainability, in this context, can be understood as maintaining and fostering community processes that are part of a broader approach for

strengthening community assets, enhancing capacity and addressing identified needs.

While funding is often cited as a key determinant of project sustainability, it is by no means the only one. The research discusses nine key factors influencing sustainability, including: vision/mission, planning, community involvement, leadership, partnerships, communication, networking, resources (financial, physical, human) and evaluation/accountability.

This report also begins to explore the key skills organizations must possess in order to translate their understanding of sustainability into positive results. It provides guidance on the attributes that successful organizations and their project managers should possess to foster sustainability.

Community organizations themselves are a source of grassroots tools and effective practices for enhancing sustainability. This report summarizes the best practices of 17 of these organizations located throughout Atlantic Canada, and it recommends more networking and shared learning among the organizations to determine if these exciting practices can be replicated in other settings through peer mentoring.

The research also identifies several existing tools designed to assist organizations – ranging from a ‘Sustainability Checklist’ to a comprehensive, step-by-step ‘Sustainability Workbook.’ The report recommends that the tools be explored further and possibly adapted for use in Atlantic Canada (the research identified American, but no Canadian tools).

Research participants feel strongly that there is a growing need for voluntary sector organizations, policy makers and funders in Atlantic Canada to have a “meeting of the minds” about project sustainability. Therefore, a key recommendation in this report calls for a “Project Sustainability Learning Forum” for key stakeholders in Atlantic Canada to develop a common understanding of project sustainability and to begin to foster new approaches.

This report breaks new ground by helping us better understand the essential factors needed to sustain promising, new initiatives in the voluntary sector in an era of project funding, and it recommends 11 key actions that should be

pursued collaboratively with funders and policy makers in order to develop the concrete tools and approaches suggested by the research.

The recommendations, if implemented, will help generate the new knowledge, partnerships and tools needed to improve project sustainability – benefiting communities, voluntary organizations, policy makers and project funders alike.

Together, let us put the “ability” back into “project sustainability.”

Summary of Recommendations

A) Disseminating the Research

1. That the research report on project sustainability be:
 - a) Disseminated to Atlantic Canada voluntary sector groups and funders;
 - b) Disseminated to selected national organizations with an interest in strengthening the sector; and
 - c) Posted on the websites of research participants.
2. That a user-friendly research summary/abstract and PowerPoint presentation be developed and disseminated to key stakeholders for their use in further disseminating the research.
3. That the research be released to the media (possibly coordinated across Atlantic Canada in cooperation with the research participants).
4. That consideration be given to using the research for “in-servicing” with voluntary sector organizations and primary funders.
5. That opportunities be explored to present the research findings at relevant conferences, workshops and policy forums within Atlantic Canada (and across Canada).

B) Developing/Testing New Tools & Approaches

6. That the sustainability tools identified by the research be further explored in collaboration with voluntary sector organizations to determine their usefulness in addressing identified needs;
7. That consideration be given to developing (a) a simple check-list; (b) a more comprehensive guide or workbook (a 'how-to' manual linked to the check-list); and (c) case studies/profiles of best practices already being used;
8. That the sustainability tools be adapted for application within/among voluntary sector organizations in Atlantic Canada;
9. That the tools be "animated" for participating organizations through a supportive, facilitated approach to enhance learning and outcomes and assess the effectiveness of the tools for possible wider application.

C) Shared Learning

10. That opportunities be explored to test existing project sustainability best practices currently being used by some of the research participants and apply them within interested voluntary organizations using a peer/mentoring approach.

D) A Project Sustainability Learning Forum

11. That a "Project Sustainability Learning Forum" be convened, involving voluntary sector organizations and their primary funders in Atlantic Canada to develop a common understanding of project sustainability, to strengthen relationships and to explore new tools and approaches for enhancing sustainability.

Methodology

The research for this report was conducted between January and March 2004. The Murphy Centre engaged Bruce Pearce of St. John's, NL to undertake the research.

This report is based on:

- ✍ A review of literature pertaining to project sustainability (and voluntary sector sustainability) drawn from Canada and the United States;
- ✍ Interviews with 17 representatives from community-based organizations in Atlantic Canada, and two representatives from Health Canada's Population and Public Health Branch (Atlantic and Québec);
- ✍ A Think Tank workshop in Halifax, NS on March 18-19, 2004 involving ten research participants from across Atlantic Canada selected from those interviewed.

The literature utilized for the research was generated through library, media and Internet searches and from suggestions provided by project participants. A summary of these resources is included in Appendix A.

Interviews involved voluntary sector organizations, some of whose projects are sponsored under Health Canada's Population Health Fund. An Advisory Committee established by the Murphy Centre selected organizations representing a wide spectrum of experiences and perspectives relevant to the research being undertaken. The interview questions used for this research are included in Appendix B.

The Think Tank workshop participants discussed the draft research report and recommendations, and they explored proposed tools and strategies for future work to enhance project sustainability. Cathy Wright of Saint John, New Brunswick facilitated the workshop.

Based on the literature review, interviews and input from the Think Tank workshop on the draft research report, a final report was produced for the Murphy Centre in June 2004 to assist and guide stakeholders in future efforts to ensure project sustainability.

Project Researcher & Facilitator

Bruce Pearce (NL) is the researcher and author for this project. He has led research, communications, policy development and a variety of social and environmental initiatives for the public and nonprofit sectors in Ontario and Newfoundland. His employers and clients have included Ontario Premier Bob Rae (1991-95), Metro Toronto Councillor Jack Layton (1995-1998), the Community Services Council NL and the Conservation Corps NL. Bruce is a community-development worker with the St. John's Community Advisory Committee on Homelessness, and he is volunteer vice chair of Canada's Green Communities Association. In addition, he is a board member of the NL Lung Association.

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Cathy Wright (NB) is the workshop facilitator for this research project, and she brings with her 28 years' experience working and volunteering in the social development field. She works as a consultant with local, provincial and national groups through research, writing, planning and facilitation and was former executive director of the Human Development Council, a community social planning agency in Saint John. She has served on the board of the Canadian Council on Social Development, and she has helped develop collaborative efforts such as: the Voluntary Sector Initiative, Policy Link NB, the Urban Core Support Network and the Saint John Community Loan Fund.

Email: cwright@nb.aibn.com

List of Interviews and Think Tank Participants

The following individuals/organizations participated in research interviews. Those who also participated in the Think Tank workshop are denoted with an asterisk.

- ~~SES~~ **Antigonish Women’s Resource Centre**, Antigonish, NS (Lucille Harper)
- ~~SES~~ **Bay of Fundy Marine Resource Centre**, NS (Arthur Bull)
- ~~SES~~ **Brother T.I. Murphy Learning Resource Centre Inc.**, NL (Tim Turner)*
- ~~SES~~ **Business Community Anti-Poverty Initiative**, NB (Monica Chaperlin)*
- ~~SES~~ **Canadian Mental Health Association NL**, NL (Moyra Buchan)
- ~~SES~~ **Cape Breton’s Family Place Resource Centre**, NS (JoAnna LaTulippe Rochon)*
- ~~SES~~ **Centre de Bénévolat de la Péninsule Acadienne Inc.**, NB (Léo-Paul Pinet)
- ~~SES~~ **CHANCES Inc. Family Resource Centre**, PEI (Ann Robertson)*
- ~~SES~~ **Cooper Institute**, PEI (Marie Burge)*
- ~~SES~~ **FemJEPP**, NS (Stephanie Hunter)*
- ~~SES~~ **Health Canada, Atlantic Region** (Fiona Chin-Yee)*
- ~~SES~~ **Health Canada, Quebec Region** (Monique Bélanger)
- ~~SES~~ **Lung Association NL**, NL (Niki George)*
- ~~SES~~ **NL Advisory Council on the Status of Women**, NL (Joyce Hancock)
- ~~SES~~ **Policy Link NB**, NB (Rick Hutchins)
- ~~SES~~ **Seniors Resource Centre**, NL (Rosemary Lester)*
- ~~SES~~ **Urban Core Support Network - Saint John**, NB (Brenda Murphy)
- ~~SES~~ **Women’s Network PEI**, PEI (Laurie Ann McCardle)
- ~~SES~~ **Wright, Cathy**, NB (Cathy Wright)*

Mission/Vision Statements of Participating Organizations

The Antigonish Women's Resource Centre (NS) is an independent, feminist, community-based organization. It provides information, support services and programs for women of all ages and backgrounds in an environment that is sensitive to women's needs. The Centre recognizes and addresses issues of concern to women and their families through community-development, education and research – and works together with women in the community to create a just and equitable society.

Website: www3.ns.sympatico.ca/antig.women

The Bay of Fundy Marine Resource Centre (NS) is a community-based institution, offering services, facilities and technical support to all aspects of the Bay of Fundy marine economy and eco-system. The Bay of Fundy MRC is a nonprofit organization that was established in 1997 through collaborative efforts between the Western Valley Development Authority and the Fundy Fixed Gear Council in order to give the Digby and Annapolis region the capacity to take on a greater role in the integrated management of its coastal resources.

Website: www.bfmrc.ns.ca

The Business Community Anti-Poverty Initiative (NB) is a coalition of senior business and professional community members in Saint John, working together with people living in poverty to address the root causes of poverty. BCAPI was established in 1997 and is a charitable, nonprofit organization with more than 100 members. BCAPI's vision is a community in which all residents have the opportunities and resources to participate fully in community and work life, leading to a productive and fulfilling future.

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The Brother T.I. Murphy Learning Resource Centre Inc. (NL) is a nonprofit, charitable organization established in 1986. Within a challenging and respectful environment, the Murphy Centre provides individuals with opportunities for growth through the integration of creative learning experiences designed to achieve academic, career and life goals. The Murphy Centre recognizes the immeasurable worth of all individuals and believes in their ability to make positive changes in their lives.

Website: www.murphycentre.nf.net

The Canadian Mental Health Association (NL Division) is a provincial arm of a national organization. A voluntary, charitable organization, the CMHA promotes the mental health of all and supports resilience and recovery of people experiencing mental illness. CMHA accomplishes this mission through advocacy, education, research and service.

Website: www.cmhanl.ca

Cape Breton's Family Place Resource Centre (NS) is an island-wide organization working to enhance the well-being of families with children ages 0-6 years (with the exception of the Special Needs Project which provides services Canada-wide for children/youth up to 19 years old). The organization offers prenatal, early years, parental and care provider support. Programs and services are family centred. The organization strives to create supportive environments, maximize participation and involvement and build capacity using a community-development approach.

Email: jlatulippe-rochon@familyplace.ca

The Centre de Bénévolat de la Péninsule Acadienne Inc. (NB) recruits volunteers and provides capacity development services to rural Acadian Peninsula communities. Founded in 1981, the Centre works as a catalyst to promote volunteerism, helping to identify community needs and develop resources that respond to those needs.

Website: www.cbpa.ca

CHANCES Inc. Family Resource Centre (PEI) is a community-based, nonprofit organization founded in the early 1990s that provides information and support services to parents and children (0-6 years) in the Queens County area. A volunteer Board of Directors of whom 50% are parent participant representatives governs the organization. The services and activities offered are based on a community-development approach.

Website: www.isn.net/~chances

The Cooper Institute (PEI) is named after William Cooper, a 19th century promoter of the rights of farmers to control their land. Founded in 1984, the nonprofit Institute is overseen by a collective board of directors and functions as a development education center, undertaking popular education and research and working with groups that are organizing for social change (such as primary producers, workers, First Nations and women's organizations).

Website: www.isn.net/~cooper

Feminists for Just & Equitable Public Policy (NS) – or FemJEPP – founded in 1998, is a provincial alliance of equality-seeking women's groups, individual social activists and women with first-hand experience and knowledge of the impacts of policies, programs and services at the local community level, seeking to improve public policy for women and their families in Nova Scotia. FemJEPP's vision is one in which integrated public policy is developed with women through a democratic, inclusive, transparent process.

Website: www.femjepp.ca

The Population and Public Health Branch (PPHB) Atlantic is the Atlantic Regional Office of Health Canada's PPH Branch. It undertakes a broad range of activities to improve conditions for everyone in Atlantic Canada, as well as for specific population groups at risk. The mission of the PPHB is to enable Canadians to take action on their own health and the factors that influence it. PPHB involves the public in program and policy development through partnerships and public education initiatives and by facilitating capacity building in urban and rural communities.

Website: www.hc-sc.gc.ca/hppb/regions/atlantic

The Lung Association Newfoundland & Labrador (NL), founded in 1944, is a nonprofit organization dedicated to achieving healthy breathing for the people of Newfoundland & Labrador through its programs in education, research and advocacy. It is sustained by the formalized activities of fundraising, volunteerism and organizational development.

Website: www.nf.lung.ca

The Newfoundland & Labrador Advisory Council on the Status of Women (NL) is an arms-length organization set up in 1980 by the provincial government of the day. It exists to provide advice to government on issues of women's social and economic equality. The Advisory Council was established as a body for consultation, research and advisement to government on matters relating to the status of women, and it attempts to work through a feminist process and practice.

Website: www.pacsw.com

Policy Link New Brunswick (NB) was established in the late 1990s as a multi-sectoral partnership network of government, academia, voluntary sector, business and citizens which provides a supportive, trusting environment for horizontal collaboration on concerns, common objectives and approaches whose representation is linguistically, culturally and geographically balanced. Policy Link's mission is to foster a more responsive public policy process through inclusion and collaboration among partners.

Website: www.policylink.nb.ca

The Seniors Resource Centre (NL) is a nonprofit, charitable, voluntary organization administered by a Board of Directors. Founded in 1989, it is dedicated to promoting the independence and well-being of older adults in Newfoundland & Labrador through the provision of information, as well as various programs and services.

Website: www.seniorsresource.ca

The Urban Core Support Network (NB) is a partnership of individuals and organizations working to reduce poverty in Saint John. Since 1994, UCSN has focused on public awareness and actions to remove barriers experienced by people living in poverty. The organization has 37 members who represent community agencies, individuals living in poverty, churches, business and government departments.

Website: www.ahsc.health.nb.ca/CHC/urbancore.shtml

The Women's Network PEI (PEI) is a nonprofit organization that works to strengthen and support the efforts of PEI women to improve the status of women in our society. Founded in 1981, the Network promotes the equality of women in PEI through feminist analysis and practice, provides a forum for the voices of women in PEI, provides opportunities for women to realize power, knowledge, skills, abilities, visions and financial security and empowers women through the recognition of women's achievements and potential and through listening to women's voices.

Website: www.wnpei.org

Some Useful Definitions

The Voluntary Sector

“This sector consists of organizations that exist to serve a public benefit, are self-governing, do not distribute any profits to members, and depend to a meaningful degree on volunteers. Membership or involvement in these organizations is not compulsory, and they are independent of, and institutionally distinct from the formal structures of government and the private sector. Although many voluntary sector organizations rely on paid staff to carry out their work, all depend on volunteers, at least on their boards of directors.

“In Canada there are an estimated 180,000 nonprofit organizations (including 80,000 registered charities) and hundreds of thousands more volunteer groups that are not incorporated – comprising 6.5 million volunteers and 1.5 million employees (2000).

“This diverse multitude of organizations ranges from small community-based groups to large, national umbrella organizations and includes such organizations as neighbourhood associations, service clubs, advocacy coalitions, food banks, shelters, transition houses, symphonies and local sports clubs.”¹

The organizations participating in this research project also wish to underscore the invaluable role the voluntary sector plays in strengthening Canada's social fabric – and the opportunities it provides for enhancing social and economic inclusion, social justice, democracy and vibrant, caring communities. The passion and commitment to these values were often cited as defining features of the voluntary sector.

¹ A Code of Good Practice on Funding: Building on An Accord Between the Government of Canada and the Voluntary Sector. October 2002: Appendix 1, p. 18. Voluntary Sector Initiative (www.vsi-isbc.ca).

Sustainable Development

The concept of sustainability we most commonly ascribe to voluntary sector activities actually has much deeper roots in environmental theory and practice. While many may view the financial sustainability of a project as the single key factor influencing its development and survival, the literature – and the input provided by those interviewed for this report – indicate that a broader perspective must be taken if we are to truly understand sustainability in all its dimensions.

The World Commission on Environment and Development (the Brundtland Commission) defined sustainable development as “development that meets the needs of the present without compromising the ability of future generations to meet their own needs.”²

Sustainable development has multiple objectives – promoting equity, improving our quality of life, protecting the health of people and ecosystems and sustaining our natural resources (sustainable jobs, communities, industries).

In Canada, the concept of sustainable development was integrated into federal legislation (Auditor General Act) in 1995, requiring Departments to prepare sustainable development strategies and to table them in Parliament. The Voluntary Sector Initiative represents one such approach to enhancing sustainable development.

² What is Sustainable Development? Government of Canada (www.sdinfo.gc.ca/what_is_sd/index_e.cfm)

An Understanding of Project Sustainability

The literature discussing project sustainability falls into two main categories. The first category focuses on organizational sustainability (narrow definition). The second category focuses on maintaining community processes (broad definition).

This report explores both categories in order to gain a complete understanding of sustainability and the factors that influence it – and echoes the views of interview participants who generally take the broad view that, while funding is critical to organizational sustainability, funding is only one part of the needed solution. The research participants involved in this report believe that sustainability is about maintaining community-driven processes in order to address identified needs over the long term.

While there is an acknowledgement among research participants that some voluntary sector projects, by definition, should be short term (e.g. conferences, research) – the overwhelming tendency for sector resources to come packaged in the form of short-term project funding makes it exceedingly difficult for organizations to pursue long-term objectives in a seamless and efficient manner.

Many participants share the concern that funders narrowly define sustainability as the capacity to continue to deliver the same level of services once the project funding has expired. Others argue that projects by their very definition are not sustainable in the long term (e.g. they have a beginning, middle and end). While they may be sustainable within the short-term life of the project (and therefore in the eyes of the funder), the manner in which they must be constructed and deconstructed in order to fit funding criteria runs counter to most organizations' long-term objectives and tends to deplete capacity and credibility when projects cannot be sustained.

Many of those interviewed believe a new relationship must be developed between voluntary organizations and funders based on true partnership, collaboration and mutual respect and understanding – and that this research is a step in the right direction.

Maintaining Community Processes

Sustainability can be understood as maintaining and fostering community processes that are part of a broader approach for strengthening community assets, enhancing capacity and addressing identified needs.

Sustainability helps build on communities' accomplishments and maintains momentum achieved through projects that address identified needs.

Recognizing that organizations are at varying stages of development, maintaining community processes requires that organizations blend the right mix of sustainability ingredients to fit the context. These ingredients (described in more detail in the next section) include: vision/mission, planning, community involvement, leadership, partnerships, communication, networking, resources (financial, physical, human) and evaluation/reporting/accountability.

Organizational Sustainability

Based on the literature, organizational sustainability can be defined as:

"The ability of an organization to:

- ✍ Define a relevant mission;
- ✍ Follow sound management practices; and
- ✍ Develop diversified income sources

In order to assure the continuity of high-quality services and meet the needs of all its constituents."³

Sustainability in this organizational context can be conceptualized as the interaction of the three key elements above.

The majority of research participants agree that these are hallmarks of approaches they currently use when developing and maintaining projects within their organizations.

³ Self-Assessment Module on Sustainability. 1998. International Planned Parenthood Federation (Western Hemisphere Region).

Arguments For and Against Sustainability Activities

“While the differing definitions of sustainability are important, it is also important to look at the differing views on the overall topic of sustainability. There has been some debate within the voluntary sector about whether organizations should be working toward sustainability at all.

“For example, international aid programs such as those involved in family planning in poor countries, have expressed concern that the focus on self-sufficiency detracts from their mission, and tends to favour middle- and high-income communities that are more able to pay for services.

“Organizations whose mandates include addressing poverty or who serve low-income populations have argued that some services (such as family planning) are a basic human right and a public good, and that society as a whole should pay for, or at least subsidize, the costs involved.

“On the other hand, there are many within the voluntary sector who argue that sustainability activities encourage them to develop creative new partnerships, access untapped resources, and reduce their dependency on single-source funders. Diversifying resources and partners can allow organizations to better target efforts toward serving the community, rather than toward funder needs.”⁴

Several research participants suggest the debate over sustainability is not really about whether it is desirable or not. Most agree that, in theory, sustainability is a worthwhile objective. In practice, however, they argue it is critical to first understand and acknowledge the power relationship between the voluntary sector and its funders – a relationship in which the funders, more often than not, define the terms. Therefore, according to research participants, the effort to enhance project sustainability first requires a willingness by funders to engage in an open and honest dialogue with the voluntary sector on the terms of reference for sustainability and, ultimately, a willingness to work more collaboratively with the sector in fostering sustainability.

⁴ IBID

Sustainability – Then and Now

Research participants also stressed the importance of placing the sustainability discussion in its proper historical and political context.

Project sustainability (particularly financial sustainability), not surprisingly, is a product of the project-funding era – a relatively recent funding framework adopted by governments at all levels during a period of deficit-cutting fiscal restraint that began in the 1990s.

In contrast, during the 1970s and 1980s, the approach of “core” funding for supporting the ongoing work of community-based organizations was more widely practiced.

There is a general view among research participants that the pendulum has swung too far in favour of project funding, and a re-balancing is required that once again embraces more creative funding approaches based on long-term thinking.

This view is discussed in detail in *Funding Matters*, a groundbreaking report by the Canadian Council on Social Development regarding the impact of Canada's new funding regime on nonprofit and voluntary organizations. The report warns that “the capacity of the ... sector to fulfill its important role in Canadian society is being undermined and eroded by new funding strategies that are intended to increase its accountability, self-sufficiency and competition.”⁵

⁵ *Funding Matters: The Impact of Canada's New Funding Regime on Nonprofit and Voluntary Organizations*. 2003. Canadian Council on Social Development. (www.ccsd.ca)

Characteristics of Sustainability Activities

Both the literature and the research discussions reveal several common characteristics of sustainability activities.

Sustainability is a continuum, not an absolute state

In the same way that there are degrees of self-sufficiency, there can also be degrees of sustainability. The difficulty is in developing measurable indicators to determine exactly where on the continuum a project or organization stands and where it still needs to go.

Achieving sustainability is an ongoing process

Sustainability activities are not part of a project that can be designed and implemented once and then set aside. It takes time for any organization to implement new strategies and systems and for them to take measurable effect.

There is no formula for achieving sustainability

The sustainability activities undertaken by one organization may not work for another. Both the internal capabilities of an organization and its external environment must be taken into account.

Sustainability efforts require innovation, flexibility and a willingness to take risks

In addressing sustainability, organizations will have to think of new and innovative strategies. They should also learn from others' experiences, transforming ideas to fit their own context.

Sustainability requires change

In addressing sustainability, organizations will go through changes in attitude, organization and operation. This may include internal restructuring, altered management styles, strengthened financial and administrative systems and entrepreneurial skills.

“But We Just Need Money”

Many organizations embark on sustainability planning anxious to find funding to continue their initiatives. Therefore, a sustainability planning process that critically assesses this work, and may even change it, may lead to frustration. “We thought this was about sustaining what we do, not changing it” is a sentiment often expressed in such circumstances.

Sustainability planning consciously rejects the practice of seeking the money first and tailoring the work to fit it. Articulating a vision and results and critically looking at whether project activities are effective must take place before developing a financing plan.⁶

⁶ Developing a Vision and Results Orientation: Sustainability Planning Workbook (Module II). 2003. The Finance Project (www.financeproject.org).

Essential Factors for Sustainability

If sustainability is understood as maintaining the community process and related projects and activities in order to enhance community capacity within the context of an organization's mandate, then what are the key factors or ingredients that contribute to this sustainability?

Research participants suggest that organizations considering new projects would benefit by first realistically assessing the organizational energy and stamina required to carry out the project.

Others suggest that incorporating learnings from other organizations and other sectors with experience in the project area would enhance sustainability.

In addition, participants recommend that organizations conduct an "environmental scan" during project planning to assess external factors and how they might help or hinder a project's sustainability.

While it is no surprise that all respondents stressed that strong host organizations and secure funding are key to sustaining good projects, it is noteworthy that they said that these factors must be based upon the foundation of a solid organizational or project vision if the project is to be truly sustainable and integrated into the organizational whole.

In general, the following factors were cited most often in the research as being essential for sustainability:

Vision/Mission

Having a clear picture of what is to be sustained, which flows from the organization's core values/ethics and clearly articulates what is to be achieved through the work (and its relevance to the mission).

The research participants stressed the importance of values, such as social and economic inclusion and social justice, in shaping successful projects.

Planning

Conducting the ongoing research, planning the development necessary to determine issues to be addressed that are related to the organization's mission and then clearly and carefully identifying the strategies and activities that will help address them.

Community Involvement/Ownership

Actively engaging the community in asset/gap identification, project design, delivery and decision-making processes. Identifying the community support needed and developing vehicles for community involvement and ownership through the initiative. Building a community of interest to sustain the project.

Partnerships

Working collaboratively across sectors to develop strategic partnerships designed to enhance and sustain the project, to leverage resources and to promote shared ownership of the need being addressed. Spending the time required to develop and nurture effective, mutually beneficial partnerships.

Several research participants promoted the need to more actively engage with and learn from the private sector in developing sustainable initiatives.

Strong Internal Systems

Building strong systems and structures, such as fiscal management, information, personnel and governance. Research participants suggest that these systems should be built on a solid foundation of core values and ethics, utilizing community development, teamwork and inclusive approaches.

Leadership

Developing internal and external leadership to support the project – and encouraging leaders to use their power and influence to generate support for the initiative. (Understanding the different leadership skills required – innovators vs. maintainers – and encouraging different levels of leadership.)

Communication

Informing the community about the issue the project seeks to address in order to better ensure community engagement, understanding and support for the initiative and the resulting benefits.

Networking

Sharing information, skills and experiences to enhance project sustainability within and across communities and sectors.

Resources (financial, physical, human)

Projecting the resources needed and systematically developing a variety of strategies to provide a stable base of resources over time.

Investing in organizational capacity and learning (particularly human resources) in order to retain and develop project staff and volunteers. Valuing and nurturing project volunteers, staff and partners.

Seeking ways to change funding relationships to better meet the needs of the voluntary sector and those it serves (core funding, longer-term funding, less-onerous reporting, collaborative policy making and priority setting).

Evaluation/Reporting/Accountability

Regularly gathering the information necessary for monitoring progress, evaluating outcomes and undertaking reviews of project priorities.

Disseminating information on project results to partners and the community to whom the organization is accountable to build support for sustaining related efforts.

Knowing when the work is done – knowing when and how to terminate a project that has met its goals.

Key Skills for Sustainability

Understanding the factors influencing sustainability is only one piece of the puzzle. Developing a shared understanding of the key skills required for enhancing and maintaining new initiatives can better equip voluntary organizations to identify, recruit and nurture these skills in the future.

The research Think Tank workshop participants were asked to “translate” the essential sustainability factors discussed in the research into a set of key skills for organizations and their project managers:

- ▶ **“Thinks big,” understands the context**
- ▶ **Fits small opportunities into the “big picture”**
 - ▶ **Has hope, passion, belief & trust in the capacity of people**
- ▶ **Recognizes, nurtures & mobilizes others’ talents**
 - ▶ **Delegates & builds others’ skills**
 - ▶ **Concise presents/markets key messages**
- ▶ **Is comfortable with/respected by people from all walks of life**
 - ▶ **Entrepreneurial**
 - ▶ **Listens, shares information - communicates with community**
 - ▶ **Can set priorities, multi-tasks - but knows when to say “no”**
- ▶ **Willingness to learn, change, adapt**
 - ▶ **Persistent, a “go-getter”**
 - ▶ **Makes clear, evidence-based/ethical decisions**
 - ▶ **Finds balance in life, avoids being a “workaholic”**
 - ▶ **Willing to take risks**
 - ▶ **Uses an inclusive, community-development approach**
- ▶ **Understands & values project administration and finances**
 - ▶ **Recognizes/acknowledges achievements, celebrates successes**

Assets and Gaps

The preceding section of this report identified the key characteristics, factors and skills that are essential for project sustainability. Research participants were each asked to discuss these elements in terms of assets or gaps – in order to further demarcate those characteristics that are perceived as “lacking” from those that are “more abundant.”

The table on the following page suggests that voluntary organizations interviewed generally feel satisfied that their projects are based upon strong organizational missions, respond to genuine needs and strengthen community assets.

There is one asset that all participants agree the voluntary sector has plenty of – and that is passion.

Furthermore, these organizations believe they have developed and engaged the right constituencies and partnerships for their projects and have demonstrated a credible record within the community and among funders for addressing identified needs.

In fact, most respondents agree that the defining feature of the voluntary sector – *its community ownership* – is a critical asset in its ability to navigate the sometimes-turbulent waters of project sustainability. The capacity to mobilize its broad-based community governance, networks and partners to work in concert adds to its strength and resilience.

On the other hand, organizations often lack the needed resources, time and capacity to successfully integrate new projects into their long-term work, citing the gaps identified in this section.

The Think Tank workshop participants acknowledge the difficulties associated with categorizing the factors on the following page as either “assets” or “gaps” – and recognizes that, for some organizations, any given factor may fall into both categories or even mid-way between. Overall, however, the research participants feel that the following table generally reflects their views and provides a useful tool for discussion.

Assets and Gaps

Assets	Gaps
<p>Vision/Mission:</p> <ul style="list-style-type: none"> /// Clear organizational vision & goals /// Commitment/passion for issues being addressed /// Responding to genuine/real needs 	<p>Vision/Mission:</p>
<p>Planning:</p> <ul style="list-style-type: none"> /// Needs assessments /// Consulting with stakeholders /// Innovative/creative approaches 	<p>Planning:</p> <ul style="list-style-type: none"> /// Business planning & planning in general /// Making the transition from project to sustained initiative /// Knowledge-building (having time, resources to explore other models)
<p>Community Involvement/Ownership:</p> <ul style="list-style-type: none"> /// Involvement of community/stakeholders /// Having a constituency/volunteers /// Strengthening citizenship/engagement 	<p>Community Involvement/Ownership:</p> <ul style="list-style-type: none"> /// Board & committee structures /// Building real community ownership (not enough time for this in most projects)
<p>Partnerships:</p> <ul style="list-style-type: none"> /// Funder relationships /// Teamwork /// Collaborative approaches /// How to build good relationships 	<p>Partnerships:</p> <ul style="list-style-type: none"> /// Engaging political decision-makers /// Getting government to work differently (changing inflexible policies/programs) /// Power imbalance with funders
<p>Strong Internal Systems:</p> <ul style="list-style-type: none"> /// Strong core organization & structure /// Leadership development 	<p>Strong Internal Systems:</p> <ul style="list-style-type: none"> /// Investing in skills, people /// Capacity to grow/promote new projects
<p>Communication:</p> <ul style="list-style-type: none"> /// Honest & up-front about who we are /// Credibility /// Celebrating achievements 	<p>Communication:</p> <ul style="list-style-type: none"> /// Public relations/communications
<p>Networking:</p> <ul style="list-style-type: none"> /// Capacity to draw on existing networks and resources 	<p>Networking:</p> <ul style="list-style-type: none"> /// Opportunities to network, share best practices around sustainability.
<p>Resources:</p> <ul style="list-style-type: none"> /// Funder relationships /// Capacity to generate revenue /// Volunteer base /// Community support /// Commitment of staff, board 	<p>Resources:</p> <ul style="list-style-type: none"> /// Project funding (long-term/multi-year) /// Core funding /// Limited funding opportunities in Atlantic Canada /// Competition for donors/funding
<p>Evaluation/Reporting:</p> <ul style="list-style-type: none"> /// Patience (results are sometimes "process," not simply "product") 	<p>Evaluation/Reporting:</p> <ul style="list-style-type: none"> /// Evaluating, documenting, quantifying outcomes

Challenges

Individuals participating in the research were asked to describe, in their experience, the challenges they have faced in sustaining projects, drawing upon the assets and gaps discussed in the preceding section.

The challenges identified below echo the gaps outlined by participants in the preceding section of this report – in short, they are challenges related to scarce resources which inhibit the capacity to enhance the very project sustainability factors which have been identified as critically important in this research. Given that the research focuses on project sustainability, it is, therefore, not surprising that participants targeted many of their comments at the nature of project funding itself and the challenges it poses for sustaining initiatives.

Re-visioning/re-positioning

Community-based organizations are constantly challenged to demonstrate that their services are needed and that their approaches are effective – each project application typically requires that these questions be addressed. With the environment around organizations also in a constant state of change, this task becomes a difficult one, requiring ongoing re-visioning and re-positioning to ensure that the organization's mission and vision are addressing changing needs within the community. Without an ongoing process of re-visiting the principles that brought the organization together, the temptation to chase project funding can lead to “mission drift,” in which the organization loses sight of its goals as it pursues short-term funding opportunities.

Feeling stretched, overburdened – doing more with less

A by-product of the shift to project-based funding over the past decade is the tendency for those within voluntary organizations to express concern about a shrinking capacity to keep pace with growing or shifting demands, compounded by narrowly targeted, partial investments by partners in their projects which do not cover the true costs of delivering expected activities.

Leadership diverted from organizational mission

Several research participants reported that the role of organizational leaders has also been unwittingly re-shaped by the shift to project-based funding. For example, the executive director's primary role of steering the overall organization towards its vision has been supplanted by the daily call to attend to the administrative, funding, staffing and strategic planning requirements of numerous projects. As one respondent put it, the image of the executive director growing an "organizational family" to meet community needs has been replaced by that of an "air traffic controller" for projects.

Lack of investments in core operations

Not surprisingly, all research participants cited the lack of adequate funding for their core operations as an inhibitor of project sustainability.

Organizations have become creative in finding ways to ensure that each project brings some resources to the organization as a whole; more often than not, participants noted that the balance sheet works the other way – that they contribute "in kind" resources from their core operations to all projects they undertake, creating strong limbs but a weak heart.

Research participants report that this practice is not sustainable and over the long term threatens organizations, including the projects they deliver. Most organizations reported that a modest amount of annual, core funding would significantly improve their ability to manage project sustainability.

Participants expressed concern that funding tends to be focused on front-line services at the expense of developing/sustaining partnerships – yet funders expect to see partnerships developed.

Short-term nature of project funding

For some of the organizations interviewed, short-term project funding was a positive tool for developing the organization in a step-wise, planned fashion (several organizations actually began as projects).

But for many others, project funding of one year or less was cited as depleting overall capacity – one respondent said, "It often seems that a

project has just been initiated when it is expected to wrap up (resulting in staff lay-offs, loss of partners and reduced credibility in the community as a result of a withdrawal of services).” Many argue for longer, minimum-term, multi-year project funding for promising initiatives – ranging from intervals of 18 months, to three or even five years – because the needs that they are addressing are long term.

For many in the voluntary sector, the government shift to short-term project funding is viewed as shortsighted and ultimately detrimental to the very communities funding is intended to serve. It places organizations on a funding treadmill and limits long-term planning to one-year intervals.

As one participant stated, “The obsession with constantly funding new things, while disregarding the need to sustain promising approaches over time, is as ill-considered an approach as bringing children into the world without child care, education, health care or family services – and expecting the child to walk, talk and earn a living at the age of one.”

Lack of integrated approach among funders (different reporting formats)

Organizations often cited the challenges posed by the numerous requirements of different funders/partners (particularly between federal and provincial governments), including varying criteria, rules, reporting/evaluation requirements and formats and project timelines. One participant reported that running a voluntary sector project is like knitting a garment from a patchwork of available cloth (some of which is only available at certain times) – with each project requiring a new pattern and new cloth – making it difficult to develop an integrated, holistic approach to overall organizational development.

Every funding source requires a large amount of detailed work

Most participants noted that each project funding source, no matter how small, requires a significant amount of effort in developing a funding rationale, establishing the matching partnerships required by the funder and gathering data and preparing reports. Therefore, each project requires as many application and reporting processes as there are funders. There

appears to be no balance or relationship between the amount of funding provided and reporting expectations.

Providing data and outcomes required by funders

Particularly for projects engaged in social change, education and long-term policy development, research participants noted the difficulties in reporting tangible outcomes – outcomes that are too often framed by funders and project partners in terms of ‘products’ rather than ‘processes.’ Several suggested that process-based activities should be considered as legitimate outcomes and that such projects should receive longer-term project funding (longer than one year, preferably three to five years) to produce measurable social, policy or program changes. Others recommended that the voluntary sector and its funders should work together to develop common reporting approaches to minimize paper work and duplication.

While funders require that projects be evaluated, there appears to be no corresponding evaluation of the funding practices and approaches themselves (i.e. are they effective?).

Limited funding sources

As noted in the literature, research participants reported that Atlantic Canada has fewer funding options from which to draw, when compared with other regions of the country. There are comparably few private foundations, community foundations and large business donors in the region.⁷

Lack of sustainability networking opportunities

Community-based organizations in Atlantic Canada report that they have limited means and few opportunities to come together to discuss project sustainability within and across sectors. More opportunities for information sharing, face-to-face networking and capacity building around this issue would be of significant benefit within the region.

⁷ Atlantic Canada’s Funding and Resourcing Environment. 2004. McConnell Foundation.

Shifting policy/funding priorities

While it is expected that community needs and policy responses will shift over time, the research participants expressed concern over frequently changing funding priorities. As they seemingly have no input or control over such shifts, research participants are expected to stand and deliver. Community-based organizations wish to be part of this decision-making process so that they can better plan for and anticipate adjustments that need to be made to address community needs. Such involvement will help organizations ensure that public policies and programs also respond to these needs.

Other challenges identified:

- ~~✍~~ A disconnect between government bureaucracy and the approaches of community-development/voluntary organizations;
- ~~✍~~ Lack of provincial government knowledge, experience and involvement in community social development (especially in Atlantic Canada);
- ~~✍~~ Erosion of the community-development role within government (as a link to communities);
- ~~✍~~ Fear of losing funding if criticizing government policy or decision making;
- ~~✍~~ Decision makers, politicians and policy makers are rarely at the table for these discussions – yet they set the rules.

Successes: Innovative & Effective Practices

This is where the research shifts from challenges faced to obstacles overcome – the following pages outline a number of innovative and effective practices for enhancing project sustainability, as recounted by the voluntary organizations that developed them.

Research participants were asked to describe their success stories in terms of “best practices” which other organizations might wish to explore. These effective approaches provide a menu of ideas from which voluntary sector organizations may choose for adapting and applying within their own project activities – and may provide tools that merit further development within Atlantic Canada should this project on sustainability continue to evolve.

The stories are inspirational and are as varied as the organizations and projects they emerged from. They provide a menu of possible tools for enhancing sustainability in other settings and are a testament to the diversity, resilience and adaptability of the voluntary, community-based sector in Atlantic Canada.

Antigonish Women's Resource Centre (NS)

~~///~~ Has become effective at accessing funding to meet its mandate without compromising its objectives – it has become good at connecting the pieces of the work it is doing (housing, health, poverty, employment) into its overall direction.

~~///~~ Has become good at writing project proposals using a phased approach for long-term activities – allowing it to meet short-term project goals within a longer-term activity framework.

Bay of Fundy Marine Resource Centre (MRC) (NS)

~~///~~ Secured a government building space from which to operate and space to rent, which generates revenue for its activities.

~~///~~ Successfully layered funding and revenue generation to sustain operations and specific activities (e.g. secured a provincial grant to

conduct its start-up feasibility study, received Community Economic Development Technical Assistance Program funding to develop its strategic vision, acquired 3-year project funding relevant to its mandate through the Community Learning Network).

- ✍ Operates as a “civil institution,” a non-governmental organization that provides technical services (GIS mapping), research and technological innovation to address community/environmental needs – receives funding (Natural Resources Canada) and revenue from the provision of these services.
- ✍ Has established ongoing funding relationships with major foundations (McConnell Family Foundation). Foundation funding is less restrictive, longer term and more “relationship-based” than most government funding.
- ✍ Developed its own funding body (after years of funding rejections by ACOA) – the Saltwater Network, a cross-border network (NS-Maine) that raises funds for community groups engaged in marine conservation – over the past three years the Network has raised \$400,000 for Canadian organizations (including MRC) and \$400,000 US for American organizations.

Business Community Anti-Poverty Initiative (NB)

- ✍ Began by conducting a community-needs assessment (this was key to future success).
- ✍ Engaging business partners helped positively influence the view of funders and the dynamics of funding relationships. Engaging people living in poverty also ensures credibility and helps maintain focus on the mission.
- ✍ Works as a catalyst by providing leadership and resources to start new initiatives that address identified needs – and helps find “homes” for these projects (BCAPI does not own or deliver projects itself).

- ✍ Has developed a range of new and innovative services leveraging significant resources from a variety of partners to address poverty and improve the health of the community and is engaged in seeking policy changes where local initiatives are not enough.
- ✍ There is a tension between the need for long-term, sustained approaches to addressing poverty and the desire for visible, short-term actions that are achievable. For BCAPI, sustainability means “What is the fastest we can go without facing capacity problems?”
- ✍ Is applying an overall approach that shifts the “funder/pleader” relationship with government to one of partnership and collaboration.

Brother T.I. Murphy Learning Resource Centre Inc. (NL)

- ✍ Moved from a linear service model to a circular service model - a comprehensive “general framework model” that guides all decisions regarding the future direction of the organization and projects within it - helps ensure that the organization remains true to its mission, while providing a place for everyone.
- ✍ The model has enabled the Centre to undertake distinct projects while also fitting them within the general framework model.
- ✍ Funders also get a “bigger bang for their buck” in knowing that their sponsored projects leverage access to other complementary services that add value for their target populations. “Funders need us as much as we need them.”
- ✍ Hired a Director of Development to secure partnerships and resources for the Centre's activities.
- ✍ The Centre is conscious about investing in human resources and mentoring. “Staff represent us in the community very well as a result” - this enhances credibility.

Canadian Mental Health Association, Newfoundland & Labrador

~~✍~~ “Helping Skills” was a two-year project that helped bridge gaps in mental health services in community and rural settings by developing facilitators to support people with mental health needs. It met a need, addressed the issue of scarce resources and provided a pool of community volunteers with needed skills. This approach has since been used in Ontario, New Brunswick and British Columbia.

~~✍~~ The “Speaking for Ourselves” project addressed the need for parallel support systems to enable people to participate on boards and committees – to become part of decision making and advocacy.

~~✍~~ The executive director’s role is critical in engaging the organization on fundamental issues such as poverty, housing and employment. The executive director needs to network in a crosscutting way in order to enhance the visibility of the issues the organization is trying to address.

Cape Breton’s Family Place Resource Centre (NS)

~~✍~~ Board orientation and development (in an environment in which board members come and go) and written policies and procedures have been crucial in helping to ensure commitment to the vision, as well as stability and predictability within the organization.

~~✍~~ Has had success working with funders to have them understand the value of common reporting tools, common evaluation approaches and timelines that do not overburden. Has developed a reporting format that allows them to gather data required for multiple sources on a monthly basis.

~~✍~~ Has been able to co-locate and share resources so that, administratively, projects have most of what they need.

~~✍~~ Successful in adding to the staff team through projects, in a way that adds value to the entire team in terms of material resources or in-house expertise.

- ✍ Has an integrated accounting system that allows them to use one program but track revenue and expenditures for multiple projects.
- ✍ Once a year, the organization closes for a week and engages in professional development, team building and visioning which helps re-energize and re-root the organization and its activities.
- ✍ Has developed relationships with funders that are longer than project funding time frames.
- ✍ The media and governments have a clear expectation of the organization's role – that it speaks to the issues clearly, strongly and respectfully – without compromising its relationships.
- ✍ The Centre integrates fun and enjoyment into all the work it does.

Centre de Bénévolat de la Péninsule Acadienne Inc. (NB)

- ✍ Since 1987, the organization made a decision to operate without grants, using a social enterprise model based on similar community-based, co-operative approaches in Saskatchewan.
- ✍ It has service agreements and provides fee-for-service activities to partners and organizations within the community, generating a \$5 million annual budget that sustains 40 full-time staff.
- ✍ The organization has found a niche for its services in the community – and works hard to re-position itself to ensure that it addresses changing needs, thus assuring its future in the community.
- ✍ Its policy of charging a 5% service fee for contracts has been changed to 10%, helping to increase revenues and keep pace with rising costs of doing business.
- ✍ Some of its services lose money (e.g. food bank, clothing bank, street worker programs) but are supported from surplus revenue from other activities.

- ✍ One of the drivers of the organization's approach to sustainability is the fact that many national programs do not work well in rural communities where the cost to deliver project services tends to be higher. Most funding programs cannot cover the full costs.

CHANCES Inc. Family Resource Centre (PEI)

- ✍ Established an informal Support Committee comprising influential community leaders that meets two or three times a year. The organization provides a status update and describes where its' goals for the upcoming year. The committee members "brainstorm" and help generate action plans to accomplish these goals. This approach has been effective in helping sustain projects and engages people who, otherwise, are too busy to serve on a Board of Directors but share a concern for the issues being addressed and a willingness to help.
- ✍ Health Canada, while not their largest funder, has provided enough of a solid base over the years through CAPC and CPNP to allow the organization to develop and not simply think of survival.
- ✍ Their "Best Start" program, which began with three years' federal funding to address the root causes of crime through early intervention and prevention, eventually levered support from the provincial government when it was demonstrated that the project activities were addressing factors that were of provincial concern (education, health, social assistance, justice). CHANCES developed a five-year agreement with senior governments to successfully shift responsibility for funding the project from the federal to the provincial government (now in year three).

Cooper Institute (PEI)

- ✍ Generates 25% of its own revenue from a combination of a sustaining donor plan (10%), the provision of workshop services (7%) and an annual mailing campaign (8%). This reduces pressures on the organization and can be used as a lever to secure funding for various projects.

- ✍ Its Health Canada-sponsored projects are designed to influence public policy and have been particularly successful because the Population Health Fund is specifically designed for this purpose and the Atlantic region staff respect community-development approaches.
- ✍ Building collaborative approaches, relationships and networks have been critical to overall success. The weakest organizations are those “that live their own lives with a fence around them.”
- ✍ Its collective structure promotes full participation by stakeholders, nurtures trusting relationships and helps the Cooper Institute fulfill one of its key roles – training communities to analyze the issues and take on their own projects to address those issues.

FemJEPP (NS)

- ✍ Made a conscious decision to become a diverse coalition (not a board, not a charity) to support its capacity to work on social policy reform.
- ✍ The organization is unique in the sense that all of its funding is project funding; it has only one staff and no office, and it supports a province-wide volunteer steering committee.
- ✍ It has been remarkably successful at generating projects that are successful on their own (satisfying funders) but which are part of a longer-term effort.
- ✍ The dedication, knowledge and experience of the organization's volunteer steering committee have been critical to project success, as has the presence of staff resources to sustain activities.
- ✍ The organization has been successful in creating a safe environment (through its steering committee and practices) and tools (through its projects) that encourage women to engage in democratic social and economic change.

- ✍ FemJEPP works well by: keeping agendas “not too heavy,” ensuring face-to-face meetings, engaging the women who are most impacted by social policies, constantly going back to its roots and by recognizing the commitment & dedication of its volunteers (having fun).
- ✍ Maintaining the focus on its objectives and being truly committed to a consensus model of decision making has contributed to the sustainability of FemJEPP.

Lung Association (NL)

- ✍ Community, corporate, health sector and media participation on project committees (such as smoking cessation) helps the organization better understand its work in a broader context – and helps partners understand the value of the work being undertaken.
- ✍ The partnerships are used to build on relationships and share resources.
- ✍ Project media/communications are also used as tools to build partnerships (i.e. it's not just about us).
- ✍ By building such strong partnerships around the project, it is hoped that by the time current project funding ends, the services will be so valued by and integrated into the community that there will be “a chorus of voices” sustaining the project.
- ✍ The “Smokers Helpline” tracks all project activities and uses results for planning, reporting.
- ✍ The organization maintains a strong volunteer and donor base to support its long-term activities and relies on project funding for short-term or new initiatives.

NL Advisory Council on the Status of Women (NL)

- ✍ The organization strives, first and foremost, to maintain its core values and objectives and chooses projects that support them.

- ✍ Uses women's practices in all decision making – "if women are not at the table, then something's missing from the project."
- ✍ Uses feminism as a basis of unity – principles of accountability, advocacy, challenge and conflict, choice, consultation, diversity, education and mentoring, equality and inclusion, evaluation, joy and celebration, leadership, power sharing and safety.
- ✍ The organization points to its "Exploring Common Ground" project as an example of an initiative that adhered to the above principles and generated sustainable, lasting results by engaging more than 700 women in community forums across the province and 458 women from 78 communities in a provincial conference to provide women with a voice in public policy making.
- ✍ The "Exploring Common Ground" initiative was both a process and a product. The product was the conference, but the process began long before the conference and continues to be integral to the work of the Advisory Council.

Policy Link New Brunswick (NB)

- ✍ Has developed a model of decision making that fits. Began with a 23-member steering committee that was too broad/cumbersome. Now the organization has a seven-member, coordinating committee, with members engaged in specific projects – this has been more effective and a better use of people's time/resources.
- ✍ Real engagement has been a growing factor in Policy Link's ongoing success. Its cross-sectoral, mechanistic model had to be processed through retreats and similar activities that fully engage participants – to develop the level of trust and openness that exists and support the degree of passion that is at the table.
- ✍ Participation in voluntary sector/policy activities whose context is broader than New Brunswick has generated valuable partnerships, knowledge and levered resources (e.g. Voluntary Sector Initiative).

Population and Public Health Branch – Health Canada (Atlantic Region)

- ~~✍~~ The research participants believe that the community-development, policy-development and health-promotion approaches supported by the Population and Public Health Branch in the Atlantic Canada region are themselves “best practices.”
- ~~✍~~ The participants, in partnership with PPHB, have been able to successfully demonstrate, through a diverse range of projects, the benefits of community-based, policy-focused initiatives in addressing the key determinants of health.
- ~~✍~~ The participants believe that PPHB’s unique programs and approaches should be documented as best practices and the resulting information promoted among other federal departments and agencies.

Seniors Resource Centre (NL)

- ~~✍~~ The Seniors Resource Centre began as a project funded by Health Canada in 1989 and has evolved into a sustained organization with six full-time staff and an annual budget of \$600,000.
- ~~✍~~ The organization has developed a “formula” for taking project application criteria and “making them our own.” Using a brainstorming process, the SRC lists the criteria for a potential project application and checks it against the needs seniors have expressed. Each project that is to be developed has a committee to guide it.
- ~~✍~~ The SRC uses a 1-800 phone line to gather information from seniors about their needs to assist with project planning. The Peer Advocate Program – which provides volunteer peer support to seniors – is a successful spin-off project of the toll-free line. Peer Advocates do not train – instead they hold information-sharing sessions that draw from seniors’ existing knowledge and experiences.
- ~~✍~~ The National Literacy Secretariat has funded SRC’s Life-Long Learners mini-courses for seniors, which is now being replicated in

rural communities outside St. John's using the model developed for the initial project.

Urban Core Support Network (NB)

- ✍ Status of Women Canada funding has evolved from short-term funding cycles to longer (18-month) project periods, which makes it easier to gear up and maintain activities over the long term.
- ✍ The longer funding periods and the nature of Status of Women and Health Canada funding also fit better with the nature of UCSN's work, which is about seeking systemic social change.
- ✍ The network is not incorporated, but it has developed strong relationships with the community and with funders that assist it in attracting the resources to do its work.
- ✍ The network uses phased approaches to manage project funding and achieve objectives. For example, the Women in Poverty project began with a research project phase to identify needs and moved to a second phase that developed a strategy in response to the needs identified. In this way, distinct project activities are linked to long-term goals.
- ✍ Intentionally having fun is key to sustaining the network. Finding ways for community members to become engaged in creative ways is an ongoing best practice. During an introductory meeting with a provincial minister, participants used role-play to identify how policies impacted their daily lives – the meeting was effective, and now, the minister is one of the network's champions.

Women's Network (PEI)

- ✍ Establishing clear roles for the Board of Directors (governance/strategic directions) and staff (day-to-day operations) and developing "ends statements" to set directions based on member input have made project management easier to juggle.

- ✍ Establishing project advisory committees spreads ownership and brings diverse perspectives and opinions into the process.
- ✍ The PEI Caucus on Youth Sexual Health is an example of a project that combined a variety of small funding sources and targeted activities into a larger whole that addressed needs in a way that was larger than the sum of the parts. This included a two-day workshop (Population Health Fund), a youth-led networking/social event during the workshop (Canadian Health Network) and focus groups around the province (Planned Parenthood).

Wright, Cathy (NB)

- ✍ Sometimes it is the projects that help sustain the organization. The Human Development Council and the Saint John Community Loan Fund are interesting examples of this.
- ✍ Successful, sustainable projects that Ms. Wright has been involved in have incorporated the following elements:
 - An analysis of needs
 - Research and exploration of best practices in an area
 - An environmental scan before initiating a project (to avoid turf issues/duplication)
 - Engaging people with first-hand knowledge of the issues
 - Involving the community in securing support from governments and businesses
 - Tracking results and evaluating them
- ✍ Being creative in "telling your story" to the community, to funders, to policy makers. Finding ways to put information together that is interesting and engaging – and involving those with first-hand experience to help tell the story.

An Ideal Environment for Sustainability

Based on the essential sustainability factors identified during the research, participants were asked to identify what an ideal environment would look like for enhancing project sustainability.

Here is what they said:

CLEAR VISION - STRONG MISSION:

- ~~///~~ Clearly articulated and understood organizational philosophy & approach, values & principles and missions & mandates.

ENGAGED STAKEHOLDERS:

- ~~///~~ Well-developed and engaged volunteer Boards of Directors.
- ~~///~~ Organizations are politically astute and know how to make the system work to achieve their vision.
- ~~///~~ Greater involvement of individuals being served (and the community as a whole) in the work voluntary groups are doing.
- ~~///~~ Having a good public relations/marketing strategy.
- ~~///~~ Valuing people, celebrating successes, acknowledging achievements.

NEW RESPECT FOR THE VOLUNTARY SECTOR:

- ~~///~~ Recognition and documentation of the value that funding generates – the results in the community.
- ~~///~~ An environment in which the Voluntary Sector Accord is practiced.
- ~~///~~ Valuing volunteers – providing tax credits for volunteer activities.
- ~~///~~ Taking better care of the people who are key to voluntary organizations: staff, board and beneficiaries.
- ~~///~~ Developing voluntary sector skill sets and training.

COLLABORATION WITHIN & ACROSS SECTORS:

- ~~///~~ Having an understanding among funders and in the community that the organization's work is of value (so you do not have to constantly prove yourself).
- ~~///~~ Organizations with similar mandates come together to share resources and collaborate.
- ~~///~~ Having business sector involvement.

NEW FUNDING RELATIONSHIPS:

- ~~///~~ A new climate of dialogue between funders and voluntary organizations regarding project sustainability and a willingness to make changes in project funding relationships.
- ~~///~~ Better tools and networking opportunities for voluntary organizations and funders to work together to enhance sustainability.
- ~~///~~ Core funding for sustaining organizational operations.
- ~~///~~ Multi-year funding for projects (three to five years).
- ~~///~~ Reduced reliance on fundraising.
- ~~///~~ Broadening the organizational funding base to reduce dependency.
- ~~///~~ The capacity to link multi-phased projects (rather than pretend each project is distinct).
- ~~///~~ Changing attitudes about sustainability – it should not mean you are on your own.

NEW APPROACHES TO EVALUATING PROGRESS:

- ~~///~~ Resources for project evaluation – greater reflection on learnings.
- ~~///~~ Common reporting and evaluation formats across funding programs.
- ~~///~~ Valuing community development – “making progress,” not simply “measuring progress.”
- ~~///~~ An understanding that longer-term goals/objectives take time.

The research participants share the belief that a key step on the road towards an ideal environment must be a forum in which Atlantic Canada's voluntary sector organizations and their funders can talk face to face.

New Ways of Working Together

Research participants expressed a desire to explore new approaches that address the underlying problems surrounding sustainability – the nature and availability of project funding in particular and the lack of networking and collaboration within and across sectors in Atlantic Canada in general.

The research has identified several promising new approaches that have recently emerged involving the Government of Canada and the voluntary sector. These approaches merit further exploration and could be discussed more fully in the context of an Atlantic Canada “Project Sustainability Learning Forum,” which is proposed in the Recommendations section of this report.

Voluntary Sector Accord:

Several participants suggested that the 2001 Accord Between the Government of Canada and the Voluntary Sector⁸ be consciously applied through a piloted approach in Atlantic Canada. The Accord, developed through the Voluntary Sector Initiative, includes commitments to action by the Government of Canada and the voluntary sector to enhance sustainability.

Code of Good Practice on Funding & Code of Good Practice on Policy Dialogue:

The Accord led to the development of a Code of Good Practice on Funding⁹ (2002), a tool for identifying practices related to the funding aspect of the sectors’ relationship, and a Code of Good Practice on Policy Dialogue¹⁰ - both areas in which research participants are suggesting further work is required to address project sustainability.

It is conceivable that a conscious effort to apply the Accord and the Codes at a regional, provincial or local level could help address these issues.

⁸ www.vsi-isbc.ca/eng/relationship/order_tools.cfm

⁹ IBID

¹⁰ IBID

Urban Aboriginal Strategy Pilot Projects:

One research participant recommended exploring a new federal funding decision-making model being used within Urban Aboriginal Strategy (UAS) pilot projects in Western Canada to determine whether there is merit in applying the model in Atlantic Canada to strengthen government-community collaboration and enhance organizational capacity and project sustainability.

The UAS pilot projects dedicated \$25 million in seed funding in the 2003 federal budget for eight priority, urban centers in Western Canada with significant urban Aboriginal needs (the pilots run until 2006).

According to the UAS pilot Terms and Conditions:

“The objective of the pilot projects is to build organizational capacity within urban Aboriginal organizations, groups and communities at the local level in order to enhance community leadership.”

“These pilot projects are intended to test new ideas on how to better respond, through partnership, to the local needs of urban Aboriginal people. Through these initiatives, federal and provincial officials, along with community and Aboriginal organizations, will co-develop innovative solutions to address local priorities that cannot be undertaken through existing programs” (Pilot Terms and Conditions Document).

The pilot projects engage five federal departments and encourage them to coordinate resources across departments in the pilot project cities. “The ultimate objective ... is to close the gap in life changes between urban Aboriginal people and the mainstream population.”

The approach utilized by the UAS pilots appears to echo the call by research participants for “a new climate of dialogue between funders and voluntary organizations” in developing an ideal environment for project sustainability.

The suggestion to explore the transferability of the UAS pilot approach to other areas of federal, multi-sectoral activities in other regions, such as Atlantic Canada merits further exploration.

Moving Forward

There is willingness among the organizations that participated in this research to build more successful approaches for enhancing project sustainability – approaches that resemble the “ideal environment” described in the previous section.

Research participants indicated they would be interested in participating in future activities that apply learnings from this research in practical ways within their projects and activities that promote further collaboration among voluntary organizations and funders in Atlantic Canada.

An Action Plan

Participants in the research Think Tank workshop suggested the following strategies as a general framework for action arising from the research. Their consensus (see below) was crafted into specific recommendations, outlined on the following pages.

- ~~✍~~ Disseminate research findings/recommendations to key stakeholders & present at policy forums (Atlantic Canada & Canada-wide).
- ~~✍~~ Develop/circulate a brief, user-friendly abstract & PowerPoint presentation of the research to stakeholders for easy use.
- ~~✍~~ Release research to the media (research participants to assist with a coordinated Atlantic-wide release).
- ~~✍~~ Use research for “in-servicing” with voluntary groups & their funders.
- ~~✍~~ Further explore/modify the sustainability tools, processes & best practices discussed in the research for use in Atlantic Canada.
- ~~✍~~ Tools to include: (a) a simple checklist; (b) a more comprehensive guide or workbook (a ‘how-to’ manual linked to the checklist); and (c) case studies/profiles of best practices already being used.
- ~~✍~~ Processes to include: (a) testing/using sustainability tools/approaches in community settings in Atlantic Canada; (b) evaluating the effectiveness of the tools/approaches.
- ~~✍~~ Convene a “Project Sustainability Learning Forum” to bring together Atlantic Canada’s voluntary sector organizations & primary funders in a face-to-face setting to develop a common understanding of project sustainability & new approaches.

Recommendations

A) Disseminating the Research

As immediate next steps, research participants recommend:

1. That the research report on project sustainability be:
 - a) Disseminated to Atlantic Canada's voluntary sector groups and funders;
 - b) Disseminated to selected national organizations with an interest in strengthening the sector; and
 - c) Posted on the websites of research participants.
2. That a user-friendly research summary/abstract and PowerPoint presentation be developed and disseminated to key stakeholders for their use in further disseminating the research.
3. That the research be released to the media (possibly coordinated across Atlantic Canada in cooperation with the research participants).
4. That consideration be given to using the research for "in-servicing" with voluntary sector organizations and primary funders.
5. That opportunities be explored to present the research findings at relevant conferences, workshops and policy forums within Atlantic Canada (and across Canada), including:
 - Federal and provincial budget hearings
 - Social policy forums
 - Voluntary Sector Forum
 - Canadian Council on Social Development's funding network
 - Queen's University's annual "Forum on Public Policy and the Third Sector"
 - Canadian Council on Social Development's annual conference to be held in Fredericton, NB (2005)

B) Developing/Testing New Tools & Approaches

Research participants also stressed the need for a range of tools to help them enhance project sustainability, including:

- ~~///~~ **A simple sustainability check-list**
- ~~///~~ **A sustainability guide or workbook (linked to the check-list)**
- ~~///~~ **Testing model approaches and best practices**

The literature review uncovered several tools designed to help organizations plan for sustainability. These tools should be further explored to determine their effectiveness and adaptability in meeting the needs of voluntary sector organizations.

The tools identified for further exploration include:

- ~~///~~ **Self Assessment Sustainability Module (International Planned Parenthood Federation - Western Hemisphere, New York, NY), 1998;**
- ~~///~~ **Sustainability Planning Workbook (The Finance Project, Washington, D.C.), 2003;**
- ~~///~~ **Guide for Improving Sustainability, (The Evaluation Centre, Western Michigan University);**
- ~~///~~ **Project Design for Program Managers (The Centre for Development and Population Activities, Washington, D.C.), 1993.**

The Guide for Improving Sustainability is a relatively simple checklist that addresses the need for a simple tool.

The Sustainability Planning Workbook appears to most closely address the need for a more comprehensive guide or workbook.

It includes five step-by-step modules (and a corresponding CD) to help program developers and community leaders identify basic issues in sustaining promising initiatives and developing a comprehensive plan. It is also the most recent of the available tools.

The Sustainability Planning Workbook includes the following modules:

- I Building a Sustainable Initiative*
- II Developing a Vision and Results Orientation*
- III Creating a Strategic Financing Plan*
- IV Building Organizational Capacity and Community Support*
- V Developing and Writing the Plan*

The Workbook's five modules include over 150 pages of readings and activities. Left on their own, voluntary sector groups may find the Workbook daunting.

Nevertheless, the tools identified in the research, including the Workbook, could be modified and adapted to achieve a better fit with the needs and circumstances of Atlantic Canada's voluntary sector organizations.

It is therefore recommended:

- 6. That the sustainability tools identified by the research be further explored in collaboration with voluntary sector organizations to determine their usefulness in addressing identified needs;**
- 7. That consideration be given to developing (a) a simple check-list; (b) a more comprehensive guide or workbook (a 'how-to' manual linked to the check-list); and (c) case studies/profiles of best practices already being used;**
- 8. That the sustainability tools be adapted for application within/among voluntary sector organizations in Atlantic Canada;**
- 9. That the tools be "animated" for participating organizations through a supportive, facilitated approach to enhance learnings and outcomes and assess the effectiveness of the tools for possible wider application.**

C) Shared Learning

As evidenced by the research with voluntary sector participants, community organizations themselves are a source of tools and effective practices for enhancing sustainability.

What if opportunities could be created for shared learning among sector organizations regarding current sustainability practices?

Several research participants support the idea of linking selected organizations in a shared-learning exercise in which they trade best practices identified in the research and apply them to current projects.

This “shared-learning” approach could be conducted in tandem with in-servicing, and/or the testing of new tools and approaches recommended by the research.

Therefore, it is recommended:

- 10. That opportunities be explored to test existing project sustainability best practices currently being used by some of the research participants, and apply them within interested voluntary organizations using a peer/mentoring approach.**

D) A Project Sustainability Learning Forum

Research participants seek opportunities to network further with other Atlantic Canada organizations around the topic of project sustainability – in order to share experiences and develop strategies that promote sustainability.

Some participants recommended that such networking could include a face-to-face networking session involving relevant stakeholders – and started a preliminary list of potential forum participants.

The research Think Tank expanded on this suggestion and recommends:

- 11. That a “Project Sustainability Learning Forum” be convened, involving voluntary sector organizations and their primary funders in Atlantic Canada to develop a common understanding of project sustainability, strengthen relationships and explore new tools and approaches for enhancing sustainability.**

Conclusion

The need to enhance project sustainability within the voluntary sector is not only of vital importance to the communities they serve, but it is critical for the organizations involved. Without sustainable projects there is little hope for sustainable development and vibrant communities.

The research presented in this report fills an identified gap by providing an understanding of project sustainability and the factors that are essential to nurturing it. The research paints a picture using voluntary sector organizations' first-hand experiences (challenges and successes) in enhancing the sustainability of their work.

This report is of particular relevance in the Atlantic Canada context because it explores current effective practices in the region and possible future steps that may be taken to strengthen project sustainability throughout the region.

There is a significant level of consensus among research participants regarding the need for new tools and approaches to assist them in developing sustainability plans, the need to network and collaborate more effectively on this issue and the importance of engaging policy makers and funding decision makers in finding solutions.

Over the long term, there is also broad consensus on the need to try new approaches, in collaboration with funders and other partners that will help address underlying systemic impediments to project sustainability.

This report provides a range of concrete recommendations for future steps that address both the short-term and long-term needs identified by the research participants and through the literature review.

It is hoped that the recommendations will be pursued and that this important effort will be sustained.

Appendix A

Literature Review

Title/Source	Description	Resource Type
A code of good practice on funding. Voluntary Sector Initiative. Ottawa, 2002. www.vsi-isbc.ca	The code is a tool for identifying practices related to the funding aspect of the voluntary sector/federal government relationship. It is meant to guide interactions on funding policies and practices.	Policy Best Practice Tool
A code of good practice on policy dialogue. Voluntary Sector Initiative. Ottawa, 2002. www.vsi-isbc.ca	The code is designed to strengthen and improve the relationship between the voluntary sector and the federal government and reflects a commitment to a dialogue aimed at improving public policies.	Policy Best Practice Tool
An accord between the government of Canada and the voluntary sector. Voluntary Sector Task Force. Ottawa, 2001. www.vsi-isbc.ca	Developed jointly by the federal government and the voluntary sector, the accord outlines the values and principles that will govern the relationship between the government and the sector.	Policy Best Practice Tool
Capacity inventory. The Asset-based Community Development Institute, Institute for Policy Research, Northwestern University, Evanston, IL. www.northwestern.edu/ipr/abcd	The Asset-Based Community Development Institute (ABCD), established in 1995, is built upon three decades of community-development research. The Institute supports capacity-building, community development in two ways: (1) through extensive and substantial interactions with community builders, and (2) by producing practical resources and tools for community builders to identify, nurture and mobilize neighborhood assets.	Tool Best Practice
Caught in the middle: what small, nonprofit organizations need to survive and flourish. Linda Roberts, Voluntary Sector Initiative. Ottawa, 2001. www.vsi-isbc.ca	This paper is the summary of the findings on the successes and struggles of small organizations and what supports they require to do their work effectively.	Resource
Cracks in the foundation: a study of Toronto's community-based human service sector. Community & Neighborhood Services, City of Toronto. Toronto, 2003. www.toronto.ca/depts/pdf/cns_survey_report.pdf	This study explores the stability and capacity of Toronto's community-based human service sector in the areas of service delivery, human resource management and financial resources. Issues such as lack of funding for core organizational costs, annual rather than multi-year funding cycles and inconsistent/cumbersome reporting requirements are identified.	Resource
Developing human resources in the voluntary sector (HRVS). Community Foundations of Canada, United Way of Canada, Coalition of National Voluntary Organizations. www.hrvs.ca	Provides information and tools to help organizations attract, support and keep employees.	Tool
Evaluation's role in supporting initiative stability. Harvard Family Research Project. Cambridge, MA, 2002. http://gseweb.harvard.edu/hfrp/about.html	This paper offers ideas for the roles that evaluation can play in helping foundations ensure a discussion about sustainability is started early enough and maintained throughout an initiative.	Tool Resource

Appendix A

Literature Review

Title/Source	Description	Resource Type
Funding matters: the impact of Canada's new funding regime on nonprofit and voluntary organizations. Katherine Scott, Canadian Council on Social Development. Ottawa, 2003. www.ccsd.ca	This report describes the emergence of a new funding regime for nonprofit and voluntary organizations that is changing the way organizations survive and thrive in what has become a competitive and volatile funding environment. The study assesses the impact of these changes on the capacity and long-term sustainability of organizations.	Policy
Guide for improving sustainability. The Evaluation Centre, Western Michigan University. www.ate.wmich.edu	Provides an easy-to-use, one-page checklist for improving sustainability.	Tool
Inventory of effective practices in financing and resourcing of voluntary sector organizations in Canada. Voluntary Sector Initiative. Ottawa, 2004. www.vsi-isbc.ca	Provides a set of regional case studies that highlight the successful financing practices of several Canadian voluntary organizations. These case studies were collected in six regions, encompassing all provinces and territories and present examples of creative ways voluntary organizations raise, access and utilize funds and resources to strengthen their long-term organizational capacity to meet the needs in their communities.	Best Practice Tool
National learning initiative. Association of Canadian Community Colleges and the Coalition of National Voluntary Organizations. www.vsi-isbc.ca/eng/hr/nli.cfm	The vision of NLI is “to foster dynamic leadership in the voluntary sector – effective, responsive and accountable – for a vibrant democracy and caring, inclusive communities, by enhancing human resource development, through accessible, relevant education and training opportunities.”	Resource Tool
Participating in federal public policy: a guide for the voluntary sector. Voluntary Sector Initiative. Ottawa, 2004. www.vsi-isbc.ca	A resource to help voluntary organizations participate in the federal public policy development process. The guide also gives federal departments insights into how to involve their voluntary sector counterparts more effectively.	Policy Tool
Passion and commitment under stress: Canada's nonprofit sector. Canadian Policy Research Network. Ottawa, 2003. www.cprn.org	This synthesis report highlights the findings of a series of four papers, identifying common themes and key issues while suggesting recommendations for change designed to improve the nonprofit sector's human resource capacity.	Policy
Project design for program managers: conducting a workshop on planning community-based projects. The Centre for Development and Population Activities. Washington, D.C., 1994. www.cedpa.org/publications	The manual is intended for use by trainers of project managers in non-government organizations and in government ministries. The manual has been used to train managers all over the world and compiles training activities that CEDPA has used in many programs to strengthen the capacity of health, family planning and other development organizations.	Tool
Title/Source	Description	Resource Type

Appendix A

Literature Review

<p>Secrétariat à l'action communautaire autonome (SACA), Ministry of Employment, Social Solidarity and Families, Québec. www.mess.gouv.qc.ca/francais/saca</p>	<p>This Québec provincial secretariat was created in 1995 to support and promote the development of the voluntary community-based sector. This includes policy development, fostering collaboration, raising awareness and administering dedicated funds for the sector from 5% of net revenues of provincial casinos.</p>	<p style="text-align: center;">Policy Best Practices</p>
<p>Self-assessment module on sustainability. International Planned Parenthood Federation (Western Hemisphere Region). New York, 1998. www.ippfwhr.org</p>	<p>Assessment tool for evaluating capacity of nongovernmental and governmental organizations. This module assesses the effectiveness of sustainability activities, focusing on three key areas: management practices, financial sustainability and the ability to ensure program continuity</p>	<p style="text-align: center;">Tool</p>
<p>Setting the agenda: moving forward on financing. Voluntary Sector Initiative. Ottawa, 2002. www.vsi-isbc.ca</p>	<p>The report makes recommendations to the federal government and voluntary sector organizations regarding activities and initiatives related to financing necessary for the voluntary sector to continue to meet its broad social, cultural, environmental and recreational goals (therefore strengthening communities as a means and an end).</p>	<p style="text-align: center;">Policy</p>
<p>Social entrepreneurship literature review. Sherrill Johnson, Social Entrepreneurs Network, 2003. info@sen.org.au</p>	<p>Provides an overview of existing literature in the emerging area of social entrepreneurship and examines the topic in light of growing expectations that it will generate and support radically new and effective ways of dealing with pressing social problems.</p>	<p style="text-align: center;">Definition Policy</p>
<p>Survival to sustainability: building sustainability into your project plan. Gillian Kerr, S2S. www.ecommons.net/sustain</p>	<p>Provides a template for a generic project plan, based on the premise that – to be successful – nonprofits need to define sustainability as a requirement at the beginning of the project and to use progress toward this objective as a planning tool throughout the life of the project.</p>	<p style="text-align: center;">Tool</p>
<p>Sustainability planning workbook: planning for the future. The Finance Project. Washington, D.C., 2003. www.financeproject.org</p>	<p>Helps program developers and community leaders identify basic issues in sustaining promising initiatives; address strategic details; and develop a comprehensive plan.</p>	<p style="text-align: center;">Tool</p>
<p>Sustainability. National Secretariat on Homelessness, Human Resources Skills Development Canada. Ottawa, 2001.</p>	<p>The Secretariat developed these guidelines for project sustainability in the context of the National Homelessness Initiative. The guidelines recognize that sustainability is about maintaining community processes.</p>	<p style="text-align: center;">Tool</p>
<p>Terms and conditions for the pilot projects of the Urban Aboriginal Strategy (UAS). Government of Canada, 2003.</p>	<p>The terms of reference set up a horizontal mechanism to allow coordination of federal efforts in urban areas and to build organizational capacity within urban Aboriginal organizations, groups and communities at the local level in order to enhance community leadership.</p>	<p style="text-align: center;">Policy Best Practice</p>

Appendix A

Literature Review

Title/Source	Description	Resource Type
<p>The capacity to serve: a qualitative study of the challenges facing Canada's nonprofit voluntary sector organizations. Voluntary Sector Initiative, Canadian Centre for Philanthropy. Toronto, 2003. www.nonprofitscan.ca</p>	<p>The report reveals that Canada's voluntary organizations are facing major funding challenges as they struggle to keep pace with growing demands for services. Challenges include service downloading, funding cutbacks, competition, human resources and the need for strategic planning and policy development.</p>	<p style="text-align: center;">Policy Resource</p>
<p>Toronto enterprise fund: building livelihoods for homeless and low-income people. www.torontoenterprisefund.ca</p>	<p>The Toronto Enterprise Fund is a result of the convergence of government, community and donor interests to address the root cause of homelessness – poverty and lack of economic opportunity. Funders and community organizations created the Toronto Enterprise Fund – a unique program partnership involving three levels of government and the voluntary sector to develop social purpose enterprises working with the homeless.</p>	<p style="text-align: center;">Best Practice Resource</p>
<p>Toward a better understanding of social entrepreneurship: some important distinctions. Jerr Boschee and Jim McClurg, Social Enterprise Alliance. Seattle, WA, 2003.</p>	<p>This paper discusses an important distinction between entrepreneurial and innovative nonprofit organizations and discusses the idea of merging mission and money.</p>	<p style="text-align: center;">Definition</p>
<p>What is sustainable development? Sustainable Development Info, Government of Canada. www.sdinfo.gc.ca</p>	<p>SDinfo is the Government of Canada's gateway to sustainable development information. Sustainable development is about decision making that takes into account the economy, society and the environment in an integrated way. All Canadians have a role to play in advancing sustainable development, including all levels of government, business and industry, civil society, community groups and citizens.</p>	<p style="text-align: center;">Definition Resource</p>
<p>When projects flounder: coming to the rescue when good grants go astray. GrantCraft – The Ford Foundation. New York, 2002. www.grantcraft.org</p>	<p>In this guide, grant makers recount their experiences with troubled projects and tell how they responded – or how they wish they'd responded. With the benefit of hindsight, veterans describe what they learned and offer advice on the most effective and timely way to handle distress signals.</p>	<p style="text-align: center;">Tool</p>

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Appendix B

Project Sustainability Research in the Voluntary Sector Atlantic Canada

“Filling the Gap: Keeping Good Work Going” Sponsor: The Murphy Centre, St. John’s, NL

Interview Questions:

Organizational background:

1. Please briefly describe your organization’s origin, mission, size (staff, budget) and key current activities (services, programs, projects).

Note: if the organization has a website or brochure providing the above information, please confirm, and proceed to the next question.

Understanding of sustainability and related factors:

2. How would you describe or define project sustainability in the voluntary sector?
 - a) Can you identify some key components or factors that are essential to or enhance sustainability?
 - b) Considering the sustainability factors you’ve identified, please discuss them in terms of assets or gaps, based on your own project experience (ie. which are abundant or scarce?)

Experiences related to project sustainability:

3. In your experience, what (a) challenges and (b) successes have you faced regarding project sustainability?
4. Have you found ways to enhance project sustainability within your organization that you consider to be “best practices” that others might wish to explore?
 - a) Do you know of other voluntary sector groups that have been particularly effective in this regard? If yes, can you please elaborate?

Ideas & Recommendations for Enhancing Project Sustainability:

5. Based on the essential sustainability factors you identified earlier and your own challenges/successes in this area:
 - a) What would an ideal environment look like for enhancing project sustainability?
 - b) In the long term, what recommendations would you make for enhancing project sustainability, and who should pursue them?
 - c) In the short term, what steps should be taken and/or tools developed to support organizations like yours in better ensuring project sustainability?

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