

CED SELF-EVALUATION

Counting the Beans & the Fuzzy Stuff

by François Lamontagne

“We are sending you this page-long list of questions that we would like you to answer as quickly as possible, before we can decide to work with you or not on our self-assessment process.”

I remember being slightly annoyed by the urgent tone of this missive, as I stared at my computer monitor in a Bangkok hotel room. Here I was off on an international development field trip, and somebody from home expected to tap my brain - now.

I guess I must have provided the right answers. They launched what turned out to be an extremely rich relationship between me and CRÉECQ (Carrefour de relance de l'économie et de l'emploi du centre de Québec et de la ville de Vanier), a community-based development corporation located in a poor neighbourhood of Québec City.

The start of our relationship illustrates the seriousness, professionalism, and the strategic approach adopted by the CRÉECQ in undertaking its work.

Take its approach to evaluation: from its very inception, the CRÉECQ has put together a permanent evaluation committee, recognizing from the outset the importance of monitoring its activities and measuring their impact. It has also worked closely with the Laval University on large-scale evaluation projects.



CRÉECQ's board of directors in session. (Photo credit: CRÉECQ)

THE CONTEXT

The CRÉECQ was officially created in 1993, but its origin can be traced back to four decades of community activism in Québec City's lower town. The decline of the area started in the 1950s, following the decentralization of commercial and cultural activities outside the downtown core. In the 1960s, “urban planning” efforts by the Québec Government further exacerbated the decline. These measures culminated in the construction of highways and public buildings that contributed to artificial boundaries and led to a significant population decline.

In reaction to these unwanted changes, the local population got organized.

Throughout the 1960s and 1970s, numerous committees and citizen groups led a fierce battle to promote their neighbourhoods' social revitalization. In the early 1980s, the movement took an economic spin, as several organizations emerged with a mandate to promote economic development as a tool for the area's revitalization.

The efforts of the early 1980s received support by community groups, the unions, the co-op movement, and the business sector. That led, in the winter of 1991, to the creation of a revitalization committee. It became a focal point for the community's effort to undertake socio-economic development. Supported financially by the three levels of government, the committee's first project was to elaborate a detailed diagnosis of the neighbourhoods making up the lower town.

The diagnosis confirmed the need for a structured approach to community economic development and, in October, 1993, the CRÉECQ was born. It inherited a mission to socially and economically revitalize five neighbourhoods that today are still characterized by high unemployment, low per capita income, a high proportion of single-parent families, a very old housing stock, and a declining population.

The implementation of a truly “self”-assessment system requires a balancing act between reliance upon external resources & the use of staff & local partners.

THE ORGANIZATION

The CRÉECQ is structured as a not-for-profit organization with a staff of 12 persons, divided between administrative support, development, and project support. Its board of directors counts 17 members drawn from the private sector, community groups, the unions, the not-for-profit sector, the public sector, and employability groups.

The CRÉECQ's membership base is wide and growing: from 63 members in 1993-94, it now amounts to approximately

TABLE 1: THE EVALUATION PROCESS

Date	Activity
May 1999	Start of the project; initial meetings with the CRÉECQ
June 1999	Consultations with Evaluation Committee and staff
July 1999	Production of annotated bibliography on CED Evaluation
August – Sept 1999	Focus group sessions with five different constituencies
October 1999	Draft Self-Assessment Framework and Tools
December 1999	Validation Workshop leading to new version of Framework/tools
January – March 2000	Integration of tools into CRÉECQ information systems
April 2000	Planning Workshop on the Data Gathering Cycle
September 2000	Proposed Workshop on Data Analysis and Reporting

230 members. On average, one-third of the membership attends the annual general meeting. Last year, more than 180 persons (including a large contingent of non-member partners) attended the AGM, a sign of strong base support.

The CRÉECQ organizes its interventions around three priority areas: business, employment and training, and milieu. In recent years, it has spun out an independent community

loan fund and a for-profit marketing firm and widened the scope of its own activities. Among other things, the CRÉECQ now administers a microcredit program and support services for enterprises of the co-op and the social economy movements.

THE PROCESS

A major evaluation of the CRÉECQ, undertaken by a Laval University student and professor in 1998, recommended that the organization implement a permanent evalu-

ation process. The process that was envisaged would result in the development of tools to inform managers about job creation and quality, investment leverage, as well as qualitative changes taking place in different spheres of community life.

Building upon this recommendation, early in 1999 the CRÉECQ approached the Community Economic Development Technical Assistance Program (CEDTAP) for funding, with a view to access technical assistance for the design and implementation of self-assessment tools. A successful response resulted in our firm, the New Economy Development Group, being contracted out to assist the CRÉECQ in this self-assessment process.

From the outset, the process was designed to meet two objectives. First, it was to provide managers and employees with tools they could use for making better informed decisions on a day-to-day basis. Second, it was to assess the relevance, efficiency, and impacts of the organization's wide range of activities.

In addition, several key principles were laid out to guide the process:

- The self-assessment framework and tools should not be so complex as to require external technical expertise for their use.
- The integration of the tools and framework should not result in an additional

workload for the employees or the members of the Evaluation Committee.

- The assessment process should take into account the qualitative as much as the quantitative aspects of CRÉECQ's interventions.

THE MILESTONES

The project officially started in May 1999 with initial meetings with the CRÉECQ. The project design centered on a participatory process, the consultants acting primarily as technical resources and facilitators (see Table 1, p. 28).

One of the most important events on the calendar took place late in the summer of 1999. More than 70 persons representing the CRÉECQ's various constituencies gathered for five half-day focus group sessions. Representatives from the staff, the financial partners, the board

of directors and committees, the clients, and the external collaborators took part in these discussions.

The goal of the sessions was to gather comments on a range of evaluation-related topics, including what meaningful indicators exist for measuring client satisfaction, quality of life, and the quantitative and qualitative impacts of the CRÉECQ's activities. The sessions also allowed the consultants to validate early drafts of various self-assessment tools. The focus group sessions, along with the other consultative activities, contributed significantly to make the process an internally-driven one.

If all goes according to plan, the staff workshop in September 2000 will end the framework's development cycle. The event will also provide an opportunity to further discuss the challenge of integrating self-assessment activities into regular programming.

THE FRAMEWORK & THE TOOLS

Table 2 provides an overview of the self-assessment framework and tools which resulted from the self-assessment process. It presents a logical model that first defines four self-assessment areas, and then identifies assessment questions, indicators and measures, and data-gathering tools for each self-assessment area.

The tools that were defined run the gamut from a staff time sheet to microcredit financial indicators to different types of client surveys.

While developing these tools, one challenge has been to ensure that the CRÉECQ staff would see immediate benefits to using them. Great care was thus taken to discuss the pros and cons of different approaches, the relevance of using computer technology, the use of the assessment results in daily management, etc. Several

TABLE 2: SELF-ASSESSMENT FRAMEWORK & TOOLS

Four self-assessment areas				
Daily management	Assessment of relevance	Assessment of effectiveness	Assessment of impacts	
↓	↓	↓	↓	
Assessment questions to be answered				
<ul style="list-style-type: none"> ▪ nature & quantity of results ▪ managerial efficiency 	<ul style="list-style-type: none"> ▪ matching of mission with needs ▪ matching of mission with activities 	<ul style="list-style-type: none"> ▪ producing at lowest cost? ▪ meeting objectives? 	<ul style="list-style-type: none"> ▪ impacts on clients ▪ impacts on partners ▪ impacts on community 	
↓	↓	↓	↓	
Assessment indicators & measures				
<ul style="list-style-type: none"> ▪ time spent on projects ▪ number of references ▪ number/type of meetings ▪ cost per project ▪ financial indicators 	<ul style="list-style-type: none"> ▪ indicators of quality of life ▪ needs indicators ▪ description of activities, mission and objectives 	<ul style="list-style-type: none"> ▪ cost per project ▪ degree of achievement of objectives 	<ul style="list-style-type: none"> ▪ client profile ▪ degree of satisfaction ▪ degree of personal and/or financial autonomy ▪ employment creation, etc. 	
↓	↓	↓	↓	
Data gathering tools				
<ul style="list-style-type: none"> ▪ staff time sheet ▪ reference sheet ▪ income & expense statement ▪ operational data 	<ul style="list-style-type: none"> ▪ survey of residents ▪ staff activity report ▪ surveys of clients ▪ survey of partners 	<ul style="list-style-type: none"> ▪ staff time sheet ▪ income and expense statement ▪ staff activity report 	<ul style="list-style-type: none"> ▪ staff activity report ▪ surveys of clients ▪ survey of partners ▪ survey of residents ▪ secondary data/ reports 	
↓				
Five "targets" (categories of activities to be assessed)				
Microcredit	Direct support activities	Training & employment	Community animation	Political advocacy

meetings with individual staff members and four all-staff working sessions provided the conduit for sorting out these issues.

The framework and the tools originally took the form of a 60-page document. It presents the principles, application areas, evaluation questions and issues, and data-

and other collaborators every step of the way - and staying away from evaluation schemes that would measure everything but the kitchen sink and consume resources beyond the organization's internal capacity. Above all, it requires from both parties a fairly high level of flexibility and trust - some-

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gathering and reporting cycles. It also contains templates for timesheets, reference sheets, performance and development indicators for microcredelift activity, surveys of clients (pre- and post-intervention), a partner survey, and a community survey. Gradually, however, the document is being taken apart and its components integrated (often via computer) into CRÉECQ's information and management systems.

LESSONS LEARNED

While it is premature to draw definitive lessons from this on-going experiment, several observations can be made.

First, it proved difficult to define indicators to measure the impact of activities that produce less visible results. For example, measuring the impact of CRÉECQ's community animation function has required a mix of indicators. These include the magnitude and scope of community events organized by the CRÉECQ, community members' knowledge of and perception about CRÉECQ's role, and the partners' perspective on CRÉECQ's networking activity. To be sure, much work remains to be done before all the qualitative impacts of CRÉECQ's work are fully taken into account. But the tools currently in place represent a step in the right direction.

Second, the implementation of a truly "self"-assessment system requires a balancing act between reliance upon external resources (such as consultants) and the use of staff and local partners. In this project, it has meant involving the staff, partners,

and other collaborators every step of the way - and staying away from evaluation schemes that would measure everything but the kitchen sink and consume resources beyond the organization's internal capacity. Above all, it requires from both parties a fairly high level of flexibility and trust - something that comes from experience, good will, and a common value set.☞

CONCLUSION

In the final analysis, the CRÉECQ has come to realize that this self-assessment process is a work in progress. Being confronted by the constant burden of shifting its resources between crisis management, programming, and long-term planning, the CRÉECQ recognizes that it has to go slowly but surely on the road to self-evaluation. At the same time, the CRÉECQ has remained faithful to the strategic approach that characterizes all its interventions: keep your eyes on the long run but show visible results in the short term, in order to keep the momentum.☞

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