

Partnership & Collaboration

2004 Annual Report

Our Mission

Tamarack engages citizens in inspired action and learning as they work together on behalf of their communities to create and realize bold visions for the future.

About Tamarack

Tamarack believes that we can find a better path forward when different sectors work together strategically in communities. The Institute provides learning resources and training, coaching, strategic consulting and study guides to help people to collaborate and to learn with and from each other.

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People in communities share common dreams. They dream of a better quality of life and safer, healthier and more prosperous places to raise their children. Tamarack believes that we can find a better path forward when different sectors work together strategically in communities. The Institute provides learning resources and training, coaching, strategic consulting and study guides to help people to collaborate and to learn with and from each other.

In the three years since the Institute's launch, Tamarack has attracted a committed constituency of people and organizations interested in community engagement, launched Vibrant Communities, a national initiative that is now active in 16 cities, and built a Learning Centre to disseminate information in a broad and strategic manner. 2004 was a year of continued development and growing impact for Tamarack.



Partnership and collaboration is at the core of our work. Our partnership with the Maytree Foundation, and Tamarack's co-founder Alan Broadbent, makes much of the Institute's work possible. The commitment of donors, staff and constituents who contribute selflessly to advancing collaboration and poverty reduction, and organizations that contract with us through the Learning Centre, enable us to develop technical supports and resources now used by thousands of people every month.

One of our most significant collaborations is Vibrant Communities, a national strategy committed to exploring the extent to which local communities can reduce poverty through multisectoral and comprehensive efforts. Founded in partnership with the J.W. McConnell Family Foundation and the Caledon Institute of Social Policy, Vibrant Communities is now active in 16 cities.

Tamarack's Learning Centre was introduced in 2004 to develop and disseminate useful and timely information for individuals and groups collaborating to effect social change. At the core of the Learning Centre is an active and growing community of 4,000 people who have subscribed to the Institute's newsletters and engage with Tamarack's tele-learning seminars and website. More than 600 people attended tele-learning seminars in 2004 and over 4,500 people regularly visit our website, actively learning by downloading more than 90,000 pages of information monthly.

Tamarack assists voluntary sector, municipalities and government organizations as well as foundations and corporations with their specific community engagement efforts. In 2004 Tamarack provided seminars, presentations and strategic consulting services to over 30 organizations, helping them to develop the knowledge and skills necessary to build healthy, equitable and self-sustaining communities.

In three years Tamarack has established a strong foundation of ideas, resources and programs that have engaged an important and growing constituency in Canada. The next year will see the Institute focus its efforts on building a more deliberate constituency, fully engaged in learning about, planning, and building collaborative efforts to create positive change in their communities.

Tamarack's Learning Centre

"Thank you for the great e-bulletin Engage! I have enjoyed it immensely, and it's been an inspiration for two e-bulletins that I have been producing for many years."

Alison Stirling, Ontario
Prevention Clearinghouse

"I've been attempting to write for ages to applaud you for all the work on the website, newsletter and further innovations such as the recent teleconferencing. The site reflects a lot of thought and energy, and obvious effort. I enjoy looking through the material and references, seldom failing to find some stimulating ideas. Keep up the good work."

Aurelia Shaw, Hands
Across Canada Project

"The work Tamarack is doing has broad implication and I have been promoting organizations and concerned individuals here to visit the website and use the materials."

Ray Neirinckx, State of
Rhode Island Housing
Resources Commission

Tamarack officially launched its Learning Centre in 2004. The Learning Centre has two interrelated services. The first is to develop and freely disseminate useful and timely information for individuals and groups collaborating to effect social change. We call these open services. The second, custom services, provides tailored supports on a fee for service or sponsored basis.

Tamarack and our constituents build a national, continual learning cycle that contributes to the understanding of community engagement in Canada and helps engaged citizens and organizations build and nurture healthy communities. We take the knowledge generated through our custom services work, distill it into lessons learned, best practices, and accessible information and share it through the Institute's freely accessible services such as the website, e-newsletters and tele-learning.

Building a Learning Community

The Internet has become an increasingly powerful tool for learning. Tamarack has chosen to invest primarily in web and telephone learning strategies as an effective means to engage constituents from across Canada and to build a community of learners. Though the Institute's learning strategies are quite new more than 4,500 people monthly are engaging in learning about community collaboration. We have developed four primary methods for interacting with constituents:

A website: Tamarack's website highlights and promotes promising examples and strategies for community wide collaboration and citizen engagement. Strategically designed by recognized online learning experts, the website is based on a learning construct used by various Fortune 500 companies to train employees. Usage has grown every month since the site's launch. In November 2004, 4,500 visitors visited the site nearly 7,000 times! In 2005 we will monitor the depth and impact of online learning and will better engage users in the site's ongoing development.



Newsletters: In 2004 we launched our bi-weekly e-newsletter Engage! Delivered to 4,300 subscribers, Engage! is receiving rave reviews for the richness of its content and its user-friendly design. We produce two additional newsletters with subscription bases of more than 800 people each and in 2005 we will launch "Communities Collaborating" to highlight our learning theme for the year. Each newsletter is linked to our website, encouraging people to engage with a growing online body of practice.

Online seminars: Online learning is growing in popularity but there is much debate as to how to create useful online process to effectively engage learners. We have experimented with three online seminars and continue to monitor their effectiveness. In 2005 we aim to develop a seminar format that will provide a deeper learning experience by linking online seminars to bulletin boards and face-to-face or tele-learning seminars and eliminating barriers to restricted content.

[Continued on page 3...]

2004 Highlights	
⇒	Website attracts 4,500 visitors and over 90,000 monthly page views
⇒	11 tele-learning seminars attract more than 600 participants
⇒	Engage: 22 issues, 4,300 subscribers
⇒	Eunoia: 12 issues, 851 subscribers
⇒	Living Community: 12 issues, 845 subscribers
⇒	3 online workshops

Tamarack's Learning Centre

Custom Services

Tamarack's Custom Services is an expression of the Institute's desire to work with organizations that share our interest in community engagement processes. We provide a flexible and responsive service that enables our partners to achieve success. We delivered the following services to over 30 organizations in 2004:

- Coaching and strategic consulting
- Training, presentations (keynotes) and workshops
- Strategy development, planning and implementation including fund/fundraising
- Communities of Learning (knowledge creation and dissemination)
- Practical resource and tool development
- Action Research (think-plan-act)
- Collaborative alliance/partnership building

Tamarack provides services in partnership with organizations, an approach we find more desirable than a client-provider relationship. Our approach is constantly adapted in response to the individuals involved, so that the users drive their own agenda and the process is customized. Whether an organization or community is forming a partnership, desires to work more collaboratively or would like their collaboration to have a bigger impact, Tamarack can help. Examples of our support in 2004 include:

Corrections Canada: Tamarack was contracted by Corrections Canada to work with the National Volunteer Association, which represents 10,000 active volunteers, to plan the future of volunteerism and community engagement in the association. Tamarack facilitated a conversation café and engaged the group in a strategic planning weekend, developing a plan that was adopted by volunteers nationally.

Dufferin County: Tamarack planned and facilitated a community process in Dufferin County to grow community assets and overcome challenges. Tamarack is helping to develop a strategy that will form a community wide collaboration and build momentum to advance social prosperity and overall well-being in Dufferin County.

Urban Aboriginal Strategy Calgary: Supported by the Privy Council Office, under the Urban Aboriginal Strategy, Tamarack provides training in partnership development and governance structures in eight cities across Canada.

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Tele-learning: Tele learning provides an inexpensive and accessible format for people to engage with leaders in Community Engagement. Tamarack hosted 11 tele-learning seminars attended by more than 600 people this year.

And more! We have been experimenting with online polling and bulletin boards, small group tele-seminars, direct, viral and print marketing and a deliberate learning community, which has grown to nearly 500 members in five months. We have tested, listened and tested again in an attempt to provide the most meaningful learning experience possible. Stay tuned for more in 2005!

2004 Custom Services Partners

Barrier Free Access Committee
Burnaby Poverty Reduction Group
Canadian CED Network
COEP, Brazil
City of Ottawa
Concordia University
Conrad Grebel College
Correctional Service of Canada
County of Dufferin
Creative City Networks
Foundation for Rural Living
Greater Trail Community Skills Centre
Hamilton Community Foundation
Human Resources and Skills Development Canada
Leaders for Change, The Maytree Foundation
National Crime Prevention Centre
Neighbourhoods Alive!
Government of Manitoba
Offord Centre for Child Studies
Ontario Association of Food Banks
Ottawa CED Network
Pillar – Voluntary Sector Network
Privy Council Office – Urban Aboriginal Strategy
Supporting Communities Partnership Initiative
Status of Women Canada
Toronto Region Immigrant Employment Council
United Way of Canada
United Way of the Lower Mainland
United Way of Ontario
United Way/Centraide Windsor-Essex County
United Way of Winnipeg
Waterloo Catholic District School Board
YWCA of Cambridge & Kitchener
YMCA of Cambridge, Kitchener & Guelph

Vibrant Communities



2004 Accomplishments

- ⇒ 5 Trail Builders developed community plans to reduce poverty in 5,400 households by 2008. A sixth community will submit in December.
- ⇒ 113 non-profit organizations, 60 government agencies, 37 businesses are now active nationally.
- ⇒ 153 people participated in the Sustainable Income Learning Initiative.
- ⇒ Communities raised \$2 million in local funding from more than 30 donors.
- ⇒ Five national funders committed over \$3 million to match local funding and provide national supports. \$2 million in additional funding is required.
- ⇒ The Funders Network was launched with over 50 local and national donors and sponsors participating.
- ⇒ The policy dialogue hosted by the Caledon Institute attracted 40 government officials representing 11 federal departments, three provincial governments and the Federation of Canadian Municipalities.
- ⇒ 175 people participated in six local Gender & Poverty working groups.

Tamarack launched Vibrant Communities in 2002 as a national strategy to grow the effectiveness of multi sector collaboration to reduce poverty. Founded in partnership with the J.W. McConnell Family Foundation and the Caledon Institute of Social Policy, Vibrant Communities is now active in 16 cities.

Cities are active in two ways. All cities engage in the Pan Canadian Learning Community, which provides a common ground to share practices and ideas for involving community leaders in high impact poverty reduction initiatives. Six cities (known as Trail Builders) are now ready to launch comprehensive community wide plans to build on local assets and involve low-income leaders, business, government and the voluntary sector.

2004 was an important year for Vibrant Communities. Still a very young movement, people worked hard to find a new path forward in their communities. The work of collaboration and multisectoral comprehensive planning is new to many organizations. Building deep and committed partnerships takes time. Trail Builders have either completed or are completing their planning process, have developed leadership teams and will be launching community wide poverty reduction initiatives in 2005. This is an exciting time for partners in Vibrant Communities.

The Pan Canadian Learning Community has been actively meeting, sharing findings and techniques with each other. In 2004 a renewed strategy was adopted for growing and strengthening how the partners learn and work together.

Challenges/Learning

While it's clear that the Vibrant Communities initiative is strengthening the local efforts of participating communities to reduce poverty, the sponsors and communities in Vibrant Communities have identified a number of key challenges in advancing the work.



- Communities find it difficult to quickly start and grow community-wide efforts to reduce poverty. It takes at least 18 to 24 months to determine local interest in starting an initiative and to generate the resources, leadership and expertise to put together a community plan and effective partnership.
- It takes time to generate results. Opportunities Niagara has contributed to initiatives that will assist nearly 900 families and the Victoria group has presented policy options to local government that, if applied, will substantially improve the stock of affordable housing in that community. Both strategies will require time and energy to bring forward.
- Community processes, and the organizations that convene them, are fragile. Even when a community collaboration follows a systematic process, their efforts can become stalled due to factors outside of their control. The Core Area Initiative in Saskatoon, for instance, has not moved forward in the last year due to perceived conflicts of interest of the sponsoring organizations in that effort.

Trail Builders

Knowledge multiplies when shared, and we are beginning to see the impact of this nationwide effort. Here is just some of the work that is unfolding in Trail Builder communities across the country.

- **Victoria** - An extensive history of collaborative community efforts in Victoria has led to the launch of the Quality of Life CHALLENGE. With broad-reaching community leadership, this group has set a goal to assist 5,000 people to secure sustainable incomes, and help 1,000 to gain access to affordable housing. *“Everyone can help make a difference in the quality of life in the community, not just the powerful,”* explains a staff person at the CHALLENGE.
- **Calgary** - Community groups, labour unions, foundations, governments, health care organizations and businesses are putting together a plan to help 1,000 people in their journey out of poverty. This vibrant community is building on research that describes the economic costs of *not* reducing poverty.
- **Edmonton** – A local multisectoral collaboration is committed to assisting 1,000 families, particularly working poor families, to move from “surviving” to “thriving” by 2007 by focusing on workforce development, family economic support and community investment strategies. Aware that there many solutions already exist in the community; the collaboration will focus on “scaling up” initiatives so more people can benefit. They are also looking to expand programs that have proven effective in assisting struggling residents to purchase homes and build up financial savings.
- **Niagara Region** - Opportunities Niagara has launched an ambitious initiative to assist 2,000 people in their journey out of poverty by the end of 2006. Public forums identified three areas around which to mobilize: secure, affordable housing; adequate incomes; and assistance for people with mental health difficulties. Opportunities Niagara is using a combination of strategies to achieve its objectives, including assisting non-profit groups to access funding required to launch poverty reduction projects, providing hands-on technical assistance and coaching, and facilitating partnerships between different sectors.
- **Montreal** – In Montreal’s St. Michel neighbourhood local leaders and residents are crafting a long-term community revitalization initiative that includes a program to reduce poverty. They have established three focus areas for their work: employment, income and business development, safe, decent and affordable housing for low-income households, and accessible cultural, social, and recreational facilities and services.
- **Saint John** - A coalition of local organizations have finalized a blueprint to assist 800 households (2,000 individuals) to improve their livelihoods in three key areas: moving from education to employment; safe, affordable housing; and childhood education and development. The vision is to reduce the community’s poverty rate to 16% in just ten years. Their efforts are already making a difference. In 2003, their advocacy encouraged the provincial government to strengthen a program that supports young parents by providing them with childcare assistance while they finish their education.



The Value of Vibrant Communities

Participating communities are using the various financial, technical and networking supports provided in both the Pan-Canadian Learning Community and Trail Builder components of the initiative.

In 2004, over 350 people participated in learning events including the living wage and sustainable income learning initiatives and the Funders Network.

In its first external assessment, over 90% of community representatives interviewed report that they use some aspect of what they learn in Vibrant Communities in their day to day work.

Tamarack and Caledon have made many upgrades to the learning methodologies in 2004. The learning is rich and practical - Vibrant Communities is making a difference.

Initial increases in community capacity, as a result of national supports, are apparent.

Communities working to become Trail Builders have created new mechanisms to reduce poverty in their community. They have mobilized a large number of local partners, secured substantial financial and in-kind resources, and have creative and innovative community plans.

The initial mid-term feedback from communities suggests that supports offered through Vibrant Communities play a critical role in developing that capacity.

Goals for 2005

"Your session was the best one at the conference. You engaged, educated, and listen to participants in your session, which are the three things that make sessions/talks/ lectures etc. worthwhile to participants who attend conferences. I am always happy when I attend something that the speaker has done his/her research about the group they are talking too. You sure did."

David Plouffe, Vancouver Museum

"Thank you for animating and challenging our group of program people. The session went some distance to helping one and all work towards a common vision of the meaning of comprehensive and the role of us, the NCPCC, in getting involved this way with communities."

Wayne Stryde, National Crime Prevention Centre

"Today was one of the most progressive experiences our Resource Centre team has experienced to date and a milestone for FRL. Thank you so much for your time and expertise and the superb facilitation around developing a learning site. We can't help but get this right."

Michelle Quintyn,
Foundation for Rural Living

2005 promises to be an exciting year for Tamarack! With the Learning Centre entering its second year of activity we can now grow our constituency and deepen our learning with them. Six Vibrant Communities' Trail Builders will launch their community plans in 2005 supported by well-defined national supports. We're looking forward to the following highlights in 2005:

The Learning Centre

In 2005, the Tamarack Learning Centre aims to:

- ⇒ Increase the number of people interacting on the website to 5,000 users visiting 10,000 times and downloading 100,000 pages monthly.
- ⇒ Increase the number of people actively learning through the Institute's learning events by redesigning the "learning community" and eliminating restricted access to large sections of our website.
- ⇒ Deepen constituent understanding and document ideas and practical resources on community collaboration and collaborative processes through our 2005 learning theme, "Communities Collaborating".
- ⇒ Develop a three-day seminar on Dynamic Community Engagement to offer in the spring of 2005 for up to 50 people.
- ⇒ Continue to grow the number of partners we support.

Vibrant Communities

The Vibrant Communities' Project Steering committee has approved the following five key directions to drive and guide the initiative over the next year:

- ⇒ Provide the initial group of Trail Builders with an optimum opportunity to generate the greatest possible outcomes and learnings by growing national supports and creating stronger mechanisms for governments and communities to address policy issues.
- ⇒ Increase the effectiveness & efficiency of the Pan-Canadian Learning Community by providing extra coaching to participating members and expanding the number of network members.
- ⇒ Create the conditions required to expand investments and supports.
- ⇒ Mobilize resources required to support the national and local work through a \$2 million fundraising campaign.
- ⇒ Explore the initiative's sustainability beyond 2008.

Becoming a Catalyst for Change

Tamarack will lay the foundation to launch our third community engagement strategy in 2006 – becoming a catalyst for change. We will form a collaboration of provincial and national organizations interested in place-based interventions that actively engage citizens in the design and delivery of services. We will convene a series of meetings and conversations in 2005 that will inform a strategy document we will present in 2006.

Financial Highlights

Tamarack is a young organization supported by foundations, businesses and government and community partners. The Institute is incorporated as a charitable organization and is audited annually by KPMG. Our board of directors, chaired by Alan Broadbent, meets regularly to provide governance and leadership, which involves, among other responsibilities, the review of financial statements, strategic plans and activity reports. Tamarack's President is Paul Born, who has over 20 years experience and leadership managing charitable organizations. The Institute's financial highlights for 2004 are provided below.

The Maytree Foundation

The Maytree Foundation has made a ten-year commitment to grow the impact of Tamarack's work. This partnership, now in its third year, provides Tamarack with a stable source of revenue allowing the Institute to work strategically. Tamarack's work would not be possible without the Maytree Foundation's support. In 2004, the Maytree grant supported Vibrant Communities, the open services component of the learning centre and core administrative costs for operating the Institute.

The J.W. McConnell Family Foundation

The J.W. McConnell Family Foundation provides support for the national component of Vibrant Communities including coaching for communities, learning, policy and evaluation. In addition the Foundation provides direct grants to Vibrant Communities' Trail Builders, totaling \$420,000 in 2004.

Donors/Supporters

Tamarack has sought financial support from donors for Vibrant Communities. Key partners in 2004 include RBC Financial, The Young Fund of the Hamilton Community Foundation and Sunlife Financial.

Tamarack also supports Vibrant Communities partners with local fundraising coaching. In 2004 local communities raised nearly \$2 million in gifts and pledges.

Generated Revenue

Tamarack generates revenue through custom services contracts.

Statement of Cash Flows (2004)

Source of cash:

The Maytree Foundation	\$300,000
The J.W. McConnell Family Foundation	\$90,000
Other donations	\$137,500
Earned income and other	<u>\$149,576</u>
	<u>\$677,076</u>

Use of Cash

Salaries and benefits	\$329,203
Supplies & services	\$332,923
Capital Assets	<u>\$ 14,483</u>
	<u>\$676,609</u>



Charitable Registration No:
862808615RR0001

Audited by: KPMG

2004 Partners & Supporters

Board of Directors

Alan Broadbent – Chairman/Co-founder
Chairman & CEO, Avana Capital Corporation
Nathan Gilbert – Vice-President
Executive Director, The Laidlaw Foundation
Ratna Omidvar - Director
Executive Director, The Maytree Foundation
Colin Robertson - Treasurer
Chief Financial Officer, Avana Capital Corporation
Vali Bennett – Secretary
Avana Capital Corporation
Paul Born – President/Co-founder
Tamarack – An Institute for Community Engagement

Advisors

Vibrant Communities Convenors
Lance Evoy, Coordinator
Institute in Management and Community Development, Concordia University
Edward (Ted) Jackson, Carlton University
Founder - CEDTAP
Charles Pascal, Executive Director
The Atkinson Charitable Foundation
Sherri Torjman, Vice-President
The Caledon Institute of Social Policy
Frances Westley, James McGill Professor of Strategy, McGill University

Staff

Paul Born, Strategic Coach & Consultant
Mark Cabaj, Strategic Coach & Consultant
Susan Damiao, Administration
Suzanne Holder, Administration & Finance
Louise Kearney, Communications
David Pell, Strategic Coach & Consultant
Kerrie Skillen, Research & Learning

Non Staff Coaches (Vibrant Communities)

Dal Brodhead, New Economic Development Group
Garry Loewen, Garry Loewen Consulting
Wayne Hussey, Wayne Hussey Consulting

Vibrant Communities Steering Committee

Tim Brodhead & Katharine Pearson
The J.W. McConnell Family Foundation
Paul Born & Mark Cabaj
Tamarack – An Institute for Community Engagement
Sherri Torjman & Eric Leviten-Reid
The Caledon Institute of Social Policy

Vibrant Communities National Donors

The J.W. McConnell Family Foundation
RBC Financial
The Maytree Foundation
The Young Fund of the Hamilton Community Foundation
SunLife Financial

Vibrant Communities

Victoria	Toronto*
Surrey	Montreal
Calgary	Trois-Rivières
Edmonton	Saint John
Saskatoon	Halifax
Winnipeg	Newfoundland
Niagara	Hamilton*
Waterloo	St. John's*

*Pending

Non Staff Researchers & Support

Karim Awad, Big Time Design & Communication
Beverley Booth, Bookkeeper
Anita Fieguth, Researcher
Heidi Holdsworth, Creative Feats
Sally Lerner, Researcher & Writer
Matt Regehr, Graphic Design
Attila Schmidt, J2X Technologies, Inc.
Helen Walsh, Think Content Inc.
Meg Westley, Research & Curriculum Development
Rita Witt, Bookkeeper (Sept. 2004)
Wes Worsfold, J2X Technologies, Inc.



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