



# Social Prosperity

WOOD BUFFALO

## FINAL EVALUATION REPORT

SOCIAL PROSPERITY WOOD BUFFALO

**Report Prepared By:**

Tanya Darisi

The O'Halloran Group



THE  
**O'HALLORAN**  
GROUP

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### **Social Prosperity Wood Buffalo Steering Committee**

Bonnah Carey, Some Other Solutions

Brandi Gartner, Oil Sands Community Alliance

Bryan Jackson, Suncor Energy Inc.

Cathy Brothers, Capacity Waterloo Region

Cathy Glover, Suncor Energy Foundation

Diane Shannon, United Way of Fort McMurray

Emmanuel Makia, FuseSocial

Erika Ford, Total

Heather Evasiuk, Regional Municipality of Wood Buffalo

Ken Chapman, Edmonton Economic Development Corporation

Ken Coates, University of Saskatchewan

Kim Nordbye, Suncor Energy Inc.

Russell Thomas, Arts Council

Sana Elache, Syncrude

Tim Reid, MacDonald Island Park

Tracey Carnochan, Suncor Energy Inc.

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# Social Prosperity Wood Buffalo: Final Evaluation Report

## Introduction

Initiated in 2010 by Suncor Energy Foundation (SEF), Social Prosperity Wood Buffalo (SPWB) has been a five year community-driven collaboration. It was designed as a process to build and sustain innovation and social change within the Regional Municipality of Wood Buffalo. It emerged from SEF's realization that a new way of doing things was needed to effect a more substantive shift in quality of life in the region. The process was supported by a partnership between Suncor Energy Foundation, University of Waterloo and community stakeholders. The original funding to the University of Waterloo ends in April 2015.

Social Prosperity Wood Buffalo was a new way of approaching community investment for SEF. It reflected a more catalytic approach to funding, and a new kind of partnership between funder and community stakeholders. It was an experiment that unfolded in the community of Ft. McMurray. As an experiment, the process has offered up new insights and understandings about innovation and systems change. It has also offered up key lessons about collaboration and community engagement.

*Getting to Maybe* (Westley, Zimmerman & Patton, 2006) has been described as the unofficial playbook of SPWB. Written for “flawed people...who are not happy with the way things are and who would like to make a difference,”<sup>1</sup> *Getting to Maybe* emphasizes the need for a systems-approach to solving complex social issues. In a systems approach, social innovators must work at different levels, engage broad partnerships, and concentrate on changing the conditions that create the disparity or issue in the first place. In getting to maybe, the trick is recognizing that any changes to a system can lead to unforeseen outcomes and unpredictable new challenges that require ongoing learning and adaptation.

At the time of writing this report, SPWB is in a moment of “maybe.” The original five-year funding cycle and partnership agreement with the University of Waterloo, as initiated by SEF, is coming to an end. While the process was ramping up through 2011 to 2013, there were numerous activities and events that provided tangible products for SPWB. During these years, there was an emerging direction for building capacity in the local social profit sector.

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<sup>1</sup> Westley, F., Zimmerman, B., Patton, M.Q. (2006). *Getting to Maybe: How the World is Changed*. Quote from inside first page.



In connection to this work, 2014 then saw meaningful shifts in the context, people and players that surrounded SPWB. The year made space for SPWB legacy and transition conversations, which surfaced uncertainties, challenges, and new expectations. 2014 also saw role and relationship changes that required new thinking about contribution and collaboration. As SPWB now finds its way into 2015, there is percolating uncertainty about what happens next. So...what will happen next?

Will the good work continue, or will it slip?

Will leaders and champions step forward to maintain the momentum of the SPWB process, or will other priorities demand their time?

Will this particular process continue to be seen as necessary to positive social change, or will energy and efforts be concentrated on something else?

The answer to either side of any one of these questions is maybe. And maybe can be quite uncomfortable. Yet in this space, maybe can also be at the heart of resiliency. The end of the initial funding cycle is a trigger to rethink, refine, and recreate. That opportunity is precious. There were a lot of successes through SPWB, there were also challenges. The moment now is to take the time develop strategy, refocus the objectives and outcomes, and nurture the relationships necessary to realizing the vision.

This report is written as the final reflection piece for the Developmental Evaluation, which was designed to make room for uncertainty, to capture emerging outcomes and changes in direction, and to foster a culture of reflection and learning. DE is a critical component for any emergent social change initiative as it demands attention to process, design and strategy.

The report presents insights and lessons learned, drawing from the findings of the SPWB evaluation, and is organized in two sections:

- I. **Looking Back.** This section provides a retrospective on Social Prosperity Wood Buffalo, starting with the theory of change. It then highlights SPWB's key contribution and outcomes<sup>2</sup>.

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<sup>2</sup> A thorough discussion of evaluation findings have been presented each year of SPWB and in the SPWB Process Report (October 2014). As well, the SPWB Case Study (in progress) details the progression of the initiative. It is not our intention to reproduce these reports. Instead this final evaluation draws on highlights from each year of the process and moves the conversation into adaptation and resilience.

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- II. Looking Ahead.** This section presents the concept of resiliency as a framework for moving forward with the critical components and contributions of SPWB. It concludes with findings from the sustainability assessment and tools for maintaining a focus on adaptive learning.

The methods used for data collection and analysis are shared in Appendix A.



## I. LOOKING BACK

From the start, SPWB has modelled collaboration and a community-based approach. It has focused on building the capacity of the community benefit sector, which was recognized as a key contributor to greater social prosperity throughout the community. The connection between stronger social profit<sup>3</sup> organizations and quality of life was a foundational assumption in its Theory of Change.

In this section, we first present a detailed discussion on the SPWB theory of change, where this theory proved strong and where refinement was needed.

### I.1 The Social Prosperity Wood Buffalo Theory of Change

A theory of change captures assumptions about the nature of a social problem, possible solutions, and how particular actions will lead to solutions. For SPWB, the theory of change was integral to the overall process. It was used to examine assumptions, develop strategies, guide decision making and prompt reflection. It was a critical learning and evaluation tool. It evolved over the duration of SPWB, showing development and refinement of the focus and activities.

The SPWB theory of change was designed to reflect the engagement and shifting momentum of the process. Underlying the theory of change were two intersecting sets of best practices: Capacity Building and Social Innovation. Capacity building was seen as a needed intervention to strengthen the social profit sector; while social innovation approaches and tools held the promise of inspiring new responses and initiatives to solve complex social problems.

The theory of change also recognized that while Social Prosperity Wood Buffalo was acting as a driver of capacity-building and social innovation, there were key stakeholder groups that needed to be engaged in order to achieve the initiative's goals for local ownership and sustainability. The stakeholders in the SPWB theory of change were:

- **The SPWB Project Team:** The project team included the Director, Project Officer and Post Doctoral Fellow in Social Innovation housed at the University of Waterloo; a Project Manager in Ft. McMurray; and an external Developmental Evaluator.
- **The Social Profit Sector:** The system of non-profit/community benefit organizations in Wood Buffalo, including capacity-building organizations, collaboratives, networks, and volunteers.

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<sup>3</sup> The language of "social profit" emerged from community conversations about the recognition of non-profit organizations in the community. It refers to non-profit organizations and is intended to reposition these organizations by what they have to give rather than by what they are not.

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- **Partners of the Social Profit Sector:** Regional and provincial governments, community leaders, industry and business.
- **The Community:** Community members and residents of Wood Buffalo.

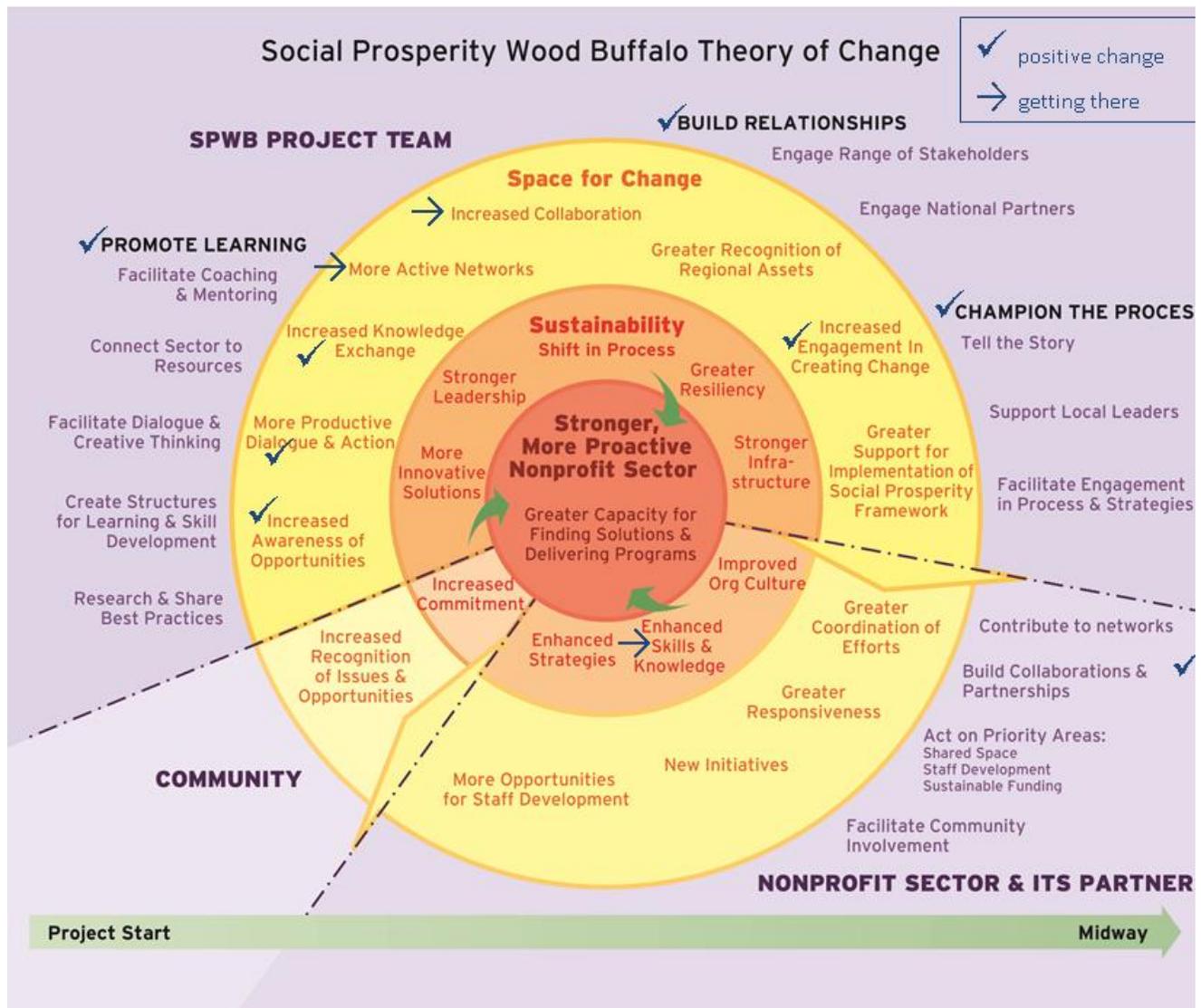
The overarching structure for the theory of change was a set of concentric circles. Around the outside of each set of circles were the activities associated with each stakeholder group, which were intended to complement each other and converge around intended outcomes. In the 2012 theory of change, the emphasis was on **Creating Space for Change** moving towards a **Stronger, More Proactive Social Profit Sector**.

There were three sources of momentum captured in the SPWB theory of change:

- The first was the shift in process where the emphasis moves from capacity-building as an intervention to capacity and innovation as a more integral part of the culture in the sector.
- The second was the movement inward from the activities to the outcomes, and the convergence of these in the achievement of long-term goals.
- The third was the shifting dynamic between the activities of the SPWB project team, the Social Profit Sector and Its Partners, and the Community. The activities of the SPWB project team were expected to drive activities and outcomes through the social profit sector and build greater quality of life in the community.

In the following figures, the check marks indicate where positive change had been observed. The arrows show where progress was ongoing.



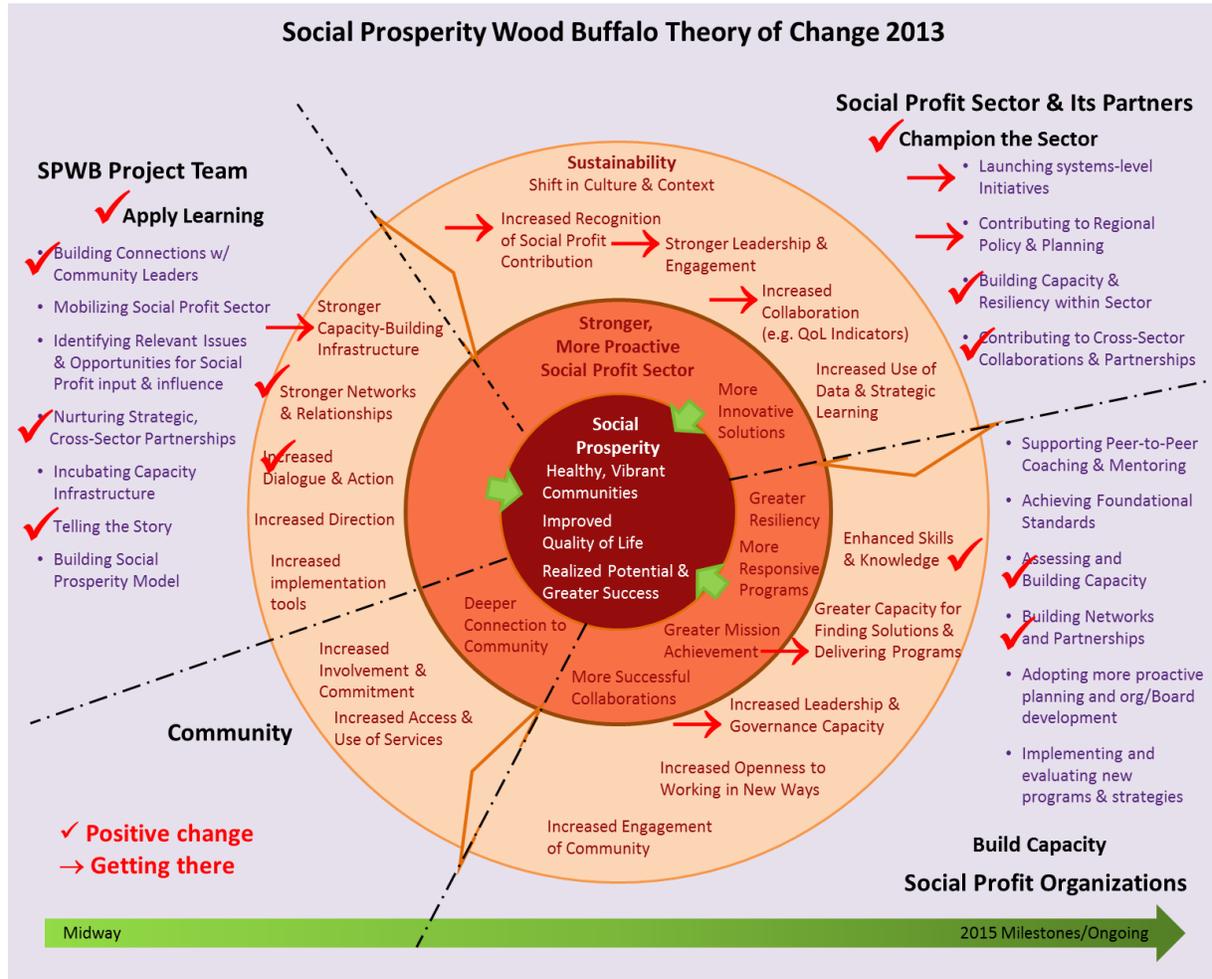


### 2012 Theory of Change

It was clear at the end of 2012 that SPWB had made a positive contribution to learning and relationship building within the social sector. SPWB was carving out a clear space and set of conversations around change. At the same time, there was recognition that the activities were focused on the organizational level. Building capacity within individual organizations was a positive outcome yet the steering committee saw the need to push more at the systems-level

and work to create change in the conditions that challenged the sector overall. As a result, activities shifted in 2013 to focus more on systems-level change and collective impact.

## 2013 Theory of Change

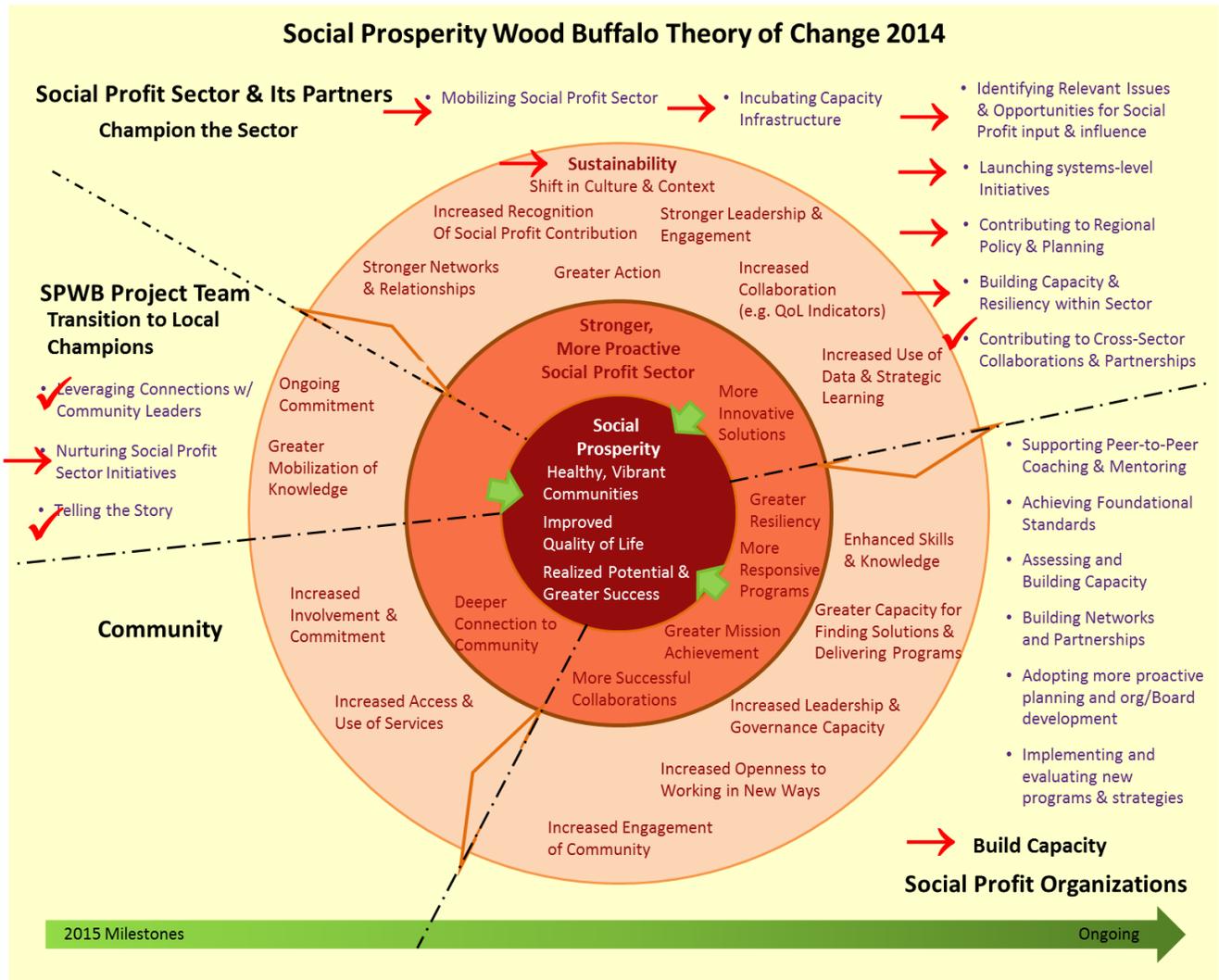


Throughout 2013, SPWB focused on applying the learning from 2012, building connections and nurturing partnerships. Early in 2013 the first ConvergenceYMM conference was held. The very occurrence of Convergence reflected movement towards a social sector that was working together to drive a common social-purpose agenda. Many of the partners involved in Convergence later convened around the development of a Strategy Roadmap for the social profit sector, again demonstrating the stronger leadership, collaboration that was developing at a systems-level within the sector.



In 2014, the emphasis shifted again towards embedding the SPWB process even deeper in the community. Greater attention on sustainability was brought forward as 2014 was the last full year of funding. SPWB hosted fewer events and invested its efforts in larger-scale initiatives such as the community wellbeing survey. Legacy conversations began dominating the SPWB agenda midway through the year. The 2014 Theory of Change reflects this shift.

### 2014 Theory of Change



## I.II Reflections on the SPWB Theory of Change

- **SPWB was successful in creating the space for change.**

SPWB was active in bringing people and players together, hosting conversations on key issues facing the social profit sector, including shared space, staff recruitment and retention, and collective impact. Bringing people and players together allowed for new ideas and spin-off initiatives – like Convergence and FuseSocial – which themselves are designed to strengthen the social profit sector. Spin-offs demonstrate the value of creating a positive space for change.

- **The theory of change was predicated on partnership and collaboration; the process wouldn't work without trust and shared ownership.**

As it turned out, SPWB was more effective and achieved more positive outcomes when it engaged in collaborative processes than when there was singular support for an activity or initiative. Shared ownership of activities and processes built credibility as well as greater sector engagement. But let there be no illusions that building shared ownership and collaboration is easy. There were many players in the field and it was delicate work to convene conversations among the right partners (i.e. those who will meet with trust and as equals, who have something to contribute, who are willing to share, and who have a readiness to engage). Throughout the process, SPWB had to maintain momentum while negotiating tensions within the community.

- **The shift in the theory of change assumed that SPWB would go deep enough to support transition and resilience at the end of five years.**

The theory of change postulated that the role of the SPWB Project Team would shift and shrink as leaders in the social profit sector, its partners and the community gained in strength, capacity and resilience. Throughout the process, there was a strong dependence on the backbone team at the University of Waterloo. This made sense given the time, expertise and resources they were able to dedicate to the activities and events. The depth of the process now is being tested through the transition conversations that have been occurring for the last six months. These conversations are surfacing new and returning tensions, which will influence the early stages of the transition.

- **The theory of change concentrated on capacity in the social profit sector. This can change.**



Capacity within the social profit sector was a clear priority and necessary starting point for moving forward; it was not sufficient to achieve the depth of community wellbeing envisioned at the centre of the theory. Going forward the Steering Committee can rethink the structure and constitution of the process and theory of change. It can evolve, for example, into a broader cross-sector collaborative that redesigns the focus areas and strategies of Social Prosperity.

- **The community contribution to SPWB remained a placeholder on the theory of change.**

There was strong recognition of the importance of community, and the community was seen as the ultimate beneficiary of SPWB through the fostering of greater social prosperity. Yet the discussion of who and how to involve community was unresolved. Perspectives ranged from the need for greater awareness and buy-in from the community to the perspective that SPWB was a background strategy that did not need to be on the minds of residents. Heading into transition, one of the key questions will be to more clearly, and strategically, define the relationship with the community.

## I.II Contribution

The theory of change provides an overview of the SPWB process. This section goes deeper into the contribution of SPWB, including its activities and outcomes since 2011.

### *The Evolving Role and Activities of SPWB*

The activities of SPWB changed over the course of the process, with each year reflecting a shift in the focus. As the SPWB timeline shows, the process became more refined, moving from a broad array of possibilities in 2011 to a defining initiative in 2014. Constant across all years was the commitment to working collaboratively with the people and players within the community as well as the commitment to creating that space for change.

### SPWB TIMELINE

**2011**    **Initiating Action** → SPWB was launched in February 2011, following a year in which SEF nurtured the idea for a community-building process in Wood Buffalo and laid the ground work for partnerships with community leaders and the University of Waterloo. In 2011, the process started broad with a community conversation to generate 100 ideas. These ideas were used to organize and guide Action Learning Teams who had the mandate of developing a framework for social prosperity. The Heart of Wood Buffalo Awards were launched in 2011, as were a number of organizational capacity-building workshops.

	2011 SPWB Activities	Partners
Feb	Community Ideation	Tamarack
Ongoing	Action Learning Team Meetings	30 Community Volunteers Volunteers from Waterloo Region
June	Heart of Wood Buffalo Awards	SEF, UW Fort McMurray, Nonprofit Sector Link, RMWB, Volunteer WB
	Transformational Leadership Meeting	Michael Jones
	Board Governance Workshop	Capacity Waterloo Region
	Rapid Improvement Workshop	Tamarack, Suncor Energy
July	Nonprofit Survey	
Sept	Nonprofit Branding Workshop	Overlap Associates
	Strategic Planning Workshop	Capacity Waterloo Region
	Capacity Building Organization Meeting	Capacity Waterloo Region
Nov	Technology Workshop	IBM, Capacity Waterloo Region
	Board Governance Workshop	Capacity Waterloo Region
	Volunteer Wood Buffalo Board Governance Workshop	Capacity Waterloo Region
	Safe Community Wood Buffalo Board Governance Workshop	Capacity Waterloo Region; Nonprofit
Dec	Capacity Building Organization Meeting	Sector Link Wood Buffalo



**2012 Building Capacity** → While the Action Learning Teams did not take root beyond 2011, the successes of the professional development workshops did. That first year brought into focus the need to enhance capacity at an organizational level as a condition for strengthening the sector overall. In 2012, the SPWB Steering Committee prioritized organizational capacity building and the team devised a number of learning events for the social profit sector. 2012 included community conversations, workshops, strategic planning sessions for social profit boards of directors as well as development of the Imagine Canada Accreditation series.

	<b>2012 SPWB Activities</b>	<b>Partners</b>
Jan	Noralta Skating Club Board Governance	Capacity Waterloo Region
	Nonprofit Sector Link Strategic Planning	Capacity Waterloo Region
	Change Lab	Overlap Associates
April	Shared Services Consultation and Visioning Exercise	Overlap Associates
	Capacity Building Organization Meeting	Nonprofit Sector Link Wood Buffalo
	Social Prosperity Summit	
	Strategic Planning Facilitation Training	Capacity Waterloo Region
June	Nistawoyou Association Strategic Planning	Capacity Waterloo Region
	United Way Strategic Planning	Capacity Waterloo Region
	Family Crisis Society Strategic Planning	Capacity Waterloo Region
	Children First Strategic Planning	Capacity Waterloo Region
	Heart of Wood Buffalo Leadership Awards	SEF, UW Ft McMurray, RMWB, Nonprofit Sector Link, WB Food Bank, Volunteer WB
Sept	Learning Conference	
	Bridge Wood Buffalo Foundation Strategic Planning	Capacity Waterloo Region
	Multicultural Association Strategic Planning	Capacity Waterloo Region
	Social Innovation and Resilience	Social Innovation Generation
Oct	Capacity Assessment Survey Presentation	Nonprofit Sector Link
	Accreditation Preparation Workshop Board Governance	Imagine Canada/Capacity Waterloo Region
	Noralta Board Governance Session	Capacity Waterloo Region
Nov	Shared Technology Pilot Project	Framework
	Accreditation Preparation Workshop: Finance	Imagine Canada/Capacity Waterloo Region
	Engaging Youth for Social Innovation	Social Innovation Generation
	Accreditation Preparation Workshop Fundraising	Imagine Canada/Capacity Waterloo Region
	Social Finance for Social Innovation	Social Innovation Generation

**2013 Focusing on Systems Change** → The 2012 theory of change anticipated momentum in the SPWB process such that greater leadership and collaboration would emerge within the sector itself. Early in 2013, Steering Committee members emphasized the need for this shift to happen. They recommended SPWB concentrate on supporting the sector to move in a common direction and guided SPWB towards greater systems-level impact. As a result, SPWB organized fewer learning events and concentrated its efforts on influencing collective impact processes. The developing momentum within the sector could be seen in a number of new initiatives that were emerging, including **Convergence**, the **Strategy Roadmap**, and the merger of three social sector capacity-building organizations – Volunteer Wood Buffalo, Nonprofit Sector Link, and Leadership Wood Buffalo – into **FuseSocial**.

	<b>2013 SPWB Activities</b>	<b>Partners</b>
Jan	Diversity in Communities and Social Innovation	Social Innovation Generation
Feb	Accreditation Preparation Workshop Staff Management	Imagine Canada/Capacity Waterloo Region
	Strategic Planning, The Hub	Capacity Waterloo Region
	Convergence YMM 2013	United Way Ft McMurray, RMWB, Volunteer Wood Buffalo, Nonprofit Sector Link, Leadership Wood Buffalo
March	Accreditation Preparation Workshop Volunteer Involvement	Imagine Canada/Capacity Waterloo Region
May	Accreditation Preparation Workshop Series Celebration	
	Collaborating for Collective Impact	RMWB, Volunteer Wood Buffalo
	Heart of Wood Buffalo Awards	SEF, Wood Buffalo Food Bank, United Way Ft McMurray, Nonprofit Sector Link, Leadership Wood Buffalo, Volunteer Wood Buffalo
June		
Sept	Shared Measurement Meeting	RMWB, City of Guelph
	Youth Collective Impact Meeting 1	RMWB
	Alignment Meeting	RMWB, UW Ft McMurray, Nexus North, WB Community Village, Volunteer WB, Nonprofit Sector Link, Leadership WB
		Canadian Index of Wellbeing (CIW)
Oct	Shared Measurement Meeting	CIW, RMWB
Nov	Shared Measurement Meeting	
	Staff Recruitment and Retention Discussion	Capacity Waterloo Region
	2013 Capacity Assessment Survey Results and Learning Day	RMWB
	Youth Collective Impact Meeting 2	



**2014 Promoting Sustainability** → In 2014, there were fewer events than any of the other years. Attention focused on encouraging collective impact and implementing a community wellbeing survey. The community wellbeing survey, a “Look Into Wood Buffalo,” reflected a new cross-sector partnership and commitment to using shared data. As well by 2014, FuseSocial was beginning to carve out its space in the social sector, defining its potential contribution and figuring out its own role and set of relationships. The emergence of FuseSocial raised new considerations about SPWB’s role, making the need for a transition and sustainability plan a growing priority.

	2014 SPWB Activities	Partners
Feb	Youth Collective Impact Meeting 3	
April	Youth Collective Impact, Meeting 4	
	Social Innovation Endowment Fund Conversation	Government of Alberta; FuseSocial
	Community Wellbeing Survey Launch	RMWB, Oil Sands Community Alliance, United Way Ft McMurray, Keyano College, FuseSocial, Arts Council of Wood Buffalo, ONE Regional Recreational Association, Fort McMurray Realtors; Canadian Index of Wellbeing
June	June Community Feedback Event	
	Learning in the Strategy Cycle	
	Meeting 5 Collective Impact	
Oct	SPWB Building Resilient Communities Conference	
	"Look into Wood Buffalo!" Community Wellbeing Survey	Canadian Index of Wellbeing, RMWB, OSCA, UW Ft McMurray
	Evidence-Based Planning Workshop	FuseSocial

## **Engagement**

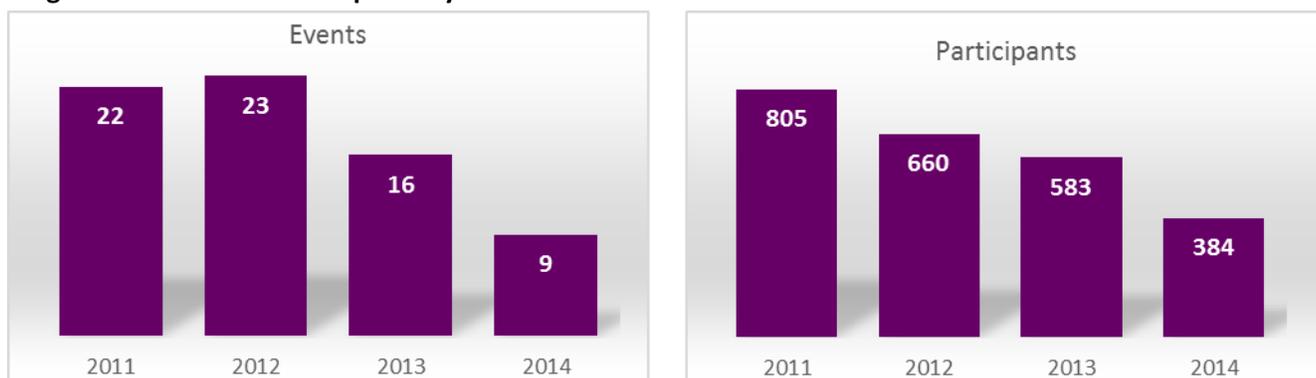
### **Events**

From 2011 to 2014, SPWB organized **and hosted over 70 events, which attracted over 2400 participants**. About half of these participants attended more than one SPWB event, with 75 individuals attending five or more events. Table 1 shows the number of unique participants and their affiliations.

**Table 1. Breakdown of SPWB Participants by Sector**

Sector	Individuals	Affiliation
Social Profit Sector	279	121 Organizations; 15 Board Members
Corporate/For-Profit	97	44 Companies
Government	71	59 Regional Municipality of Wood Buffalo 7 Provincial Government; 1 Federal Government
Public Sector	63	Health, School Boards, RCMP
Researchers	11	
Media	9	
First Nations	7	
Unaffiliated	22	
<b>Total</b>	<b>559</b>	

**Figure 1. Events and Participants by Year**



### Wellbeing Survey

Though there were fewer events in 2014, the year did see a large-scale community engagement initiative with the “Look Into Wood Buffalo” Community Wellbeing Survey. The survey was supported by broad partnership, and was distributed to over 7,200 households in Fort McMurray and outlying communities; 555 residents of Wood Buffalo participated in the initiative.<sup>4</sup> The intention is that the Wellbeing Survey findings become a vehicle for ongoing engagement and

<sup>4</sup> Detailed findings from this survey are available through the Social Prosperity Wood Buffalo website, <http://www.socialprosperity.ca/>.



planning with the community. Results of the Wellbeing Survey continue to be shared with the community and promoted as a resource for focusing social profit efforts and initiatives.

## **Communication**

The SPWB project team actively engaged the broader community (both within and outside Wood Buffalo) through the regular use of media. Outward communication included the SPWB newsletter as well as local print and radio coverage. SPWB was also highlighted through external newsletters and blogs (e.g. QASAR; #CollectiveImpact Daily). The project team also shared the story of SPWB at a number of conferences both in Alberta and across the country.

- Newsletter: n=848 visits online; email distribution n=947
- Website: n= 40,075 visits
- Social media: n=101 Facebook likes; n=718 Twitter followers, with up to 1,800 views per week.
- Conference Presentations: Keyano College; Community-University Partnerships; CKX; CCVO

The value of sharing the SPWB story and resources online has been access by diverse, and disperse, change-makers. Online media shared SPWB beyond the region of Wood Buffalo.

*“I have spent some good time today looking at the resource section of your website and I am completely blown away by your team's diligence in gathering these excellent materials and thought leadership. Just here to say thank you to you all! Thank you for all the great work, surveys, research, analysis and engaging conversations that must have birthed these huge resource bank you've offered nonprofit players.”* RegCharles Foundation, Nigeria

## **Outcomes**

Over the last four years, the most consistent outcomes for SPWB have been:

- **Stronger relationships and networks.** Event participants have indicated consistently that they have been able to build a stronger network through SPWB. These relationships have resulted in organizations more often working together on new initiatives and have fostered a stronger culture of collaboration.

*“We got the conversation started. Now when I think about tying our activities back into quality of life, I think about what other organizations might co-deliver that with us.”*

*“Networking has a much smoother flow at SPWB events. Without the distraction of doing five things at once allows participants to create communication and strengthen relationships.”*

→ **Increased learning.** The space for change has also resulted in the fostering of a stronger learning culture within the sector. Across all workshops presented by SPWB, about two-thirds of participants have reported they gained new skills, knowledge and insights that they can apply to their work. Key areas of learning were in innovation and collective impact.

*“The direct benefit to us has been to have people to speak to who think outside of the box... They listen to what I’m saying and challenge what I’m thinking. I’ve really benefited from their input and their advice.”*

→ **Enhanced Organizational Capacity.** The Board Governance workshops, strategic planning sessions and the Accreditation series, facilitated by Capacity Canada (formerly Capacity Waterloo Region), were highly commended by participants, who valued the coaching and attention to strategy. These opportunities, coupled with the learning events and workshops, have contributed to stronger social profit organizations in Wood Buffalo.

*“The accreditation training supported the changes that we needed to make as an organization. Accreditation raised the bar of us. It shows we are striving to improve and meet the needs of the community.”*

Coupled with these outcomes, SPWB was a catalysing space for spin-off initiatives that raise the profile of the social profit sector. These included:

- Heart of Wood Buffalo Awards
- 2013 Municipal Election Social-Profit Forum
- Convergence YMM
- Strategy Roadmap

## Summary

Social Prosperity Wood Buffalo provided the space for change within the social profit sector. The diverse range of opportunities for involvement – from workshops and community conversations to assessments and online resources – enabled a high level of engagement from a range of organizations and individuals. The regularity of opportunities also facilitated



relationship development, strengthening networks within the sector. This contribution was a catalyst for other initiatives and culture shifts within the social profit sector.

Two core ingredients that made this process work were collaboration and responsiveness to the community. As well, emphasis on the process and openness to uncertainty allowed SPWB to evolve as the community and social profit sector around it also evolved. This evolution kept the process current and relevant. Where SPWB ended up – with concentrated effort on the Community Wellbeing Survey – laid the ground work for the next season of growth and development within the social profit sector.

## II. LOOKING AHEAD

Social Prosperity Wood Buffalo represented a large investment of resources, time and human capital. It made a substantive contribution to the social profit sector in Wood Buffalo. None of the partners want this contribution to dissipate, and so the question on everyone's mind right now is "What next?" In looking ahead, sustainability and resilience are defining the conversation.

Resilience is defined as a system's ability to withstand disturbance and maintain the integrity of the original.<sup>5</sup> There are a number of conditions that predict resilience, including diversity, the ability to self-organize and the capacity for learning and adaptation. Within social systems, resiliency is also predicted by the capacity of social actors to plan for the future<sup>6</sup>. Resiliency emerges when change and stability work together.<sup>7</sup>

Part of the challenge for SPWB, its team, funders and the steering committee, is untangling what about the SPWB process needs to change and what should be maintained. Transition conversations first started in June of 2014, and the progress of these serves to demonstrate the challenges inherent in trying to figure out the sustainability and resiliency question. These conversations have been resurfacing tensions around agendas, trust, and direction. They have also raised questions about ownership (where does SPWB reside?), delegation (who does what?) and capacity (who has time and resources to take it on?).

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<sup>5</sup> Holling, C.S. (2001). Understanding the complexity of economic, ecological, and social systems. *Ecosystems* 4:390-405.

<sup>6</sup> Carpenter, S., B. Walker, J. M. Anderies, and N. Abel. 2001. From metaphor to measurement: Resilience of what to what? *Ecosystems* 4:765-781. Cited by The Resiliency Alliance (2012) and retrieved from <http://www.resalliance.org/index.php/resilience>

<sup>7</sup> Westley, F. Zimmerman, B. & Patton, M.Q. (2006). *Getting to Maybe: How the World is Changed*. Toronto: Random House Canada



## II.I Transition Assessment

Leveraging strengths of SPWB and addressing gaps will be critical to its adaptation to better meet the needs of the social profit sector and the community. To better understand what the strengths and gaps were, a transition assessment survey was completed by steering committee members and community leaders who have been involved in the SPWB process. The survey asked about the extent to which SPWB, including the project team and steering committee, exhibited core capacities for sustaining a contribution to the social profit sector.<sup>8</sup>

This section summarizes the highlights of the transition assessment.<sup>9</sup>

- **ENVIRONMENTAL SUPPORT: Is there a supportive climate for the process?**

Most participants perceived that there were strong champions for the process, and that SPWB was well-supported within the social profit sector. Fewer participants believed there was leadership support from government and business/industry.

- **FUNDING STABILITY: Does SPWB have ongoing financial support?**

A few participants believed that SPWB had missed opportunities to develop additional funding relationships. A few also raised concerns about the economic climate in Ft. McMurray, citing changes to the municipal budget and oil prices. One mentioned the new Community Investment Council as a promising connection.

- **INTERNAL CAPACITY: Is there the support and resources needed to effectively manage SPWB activities?**

Internal Capacity received some of the lowest ratings. There was a perceived need for more open and transparent decision making as well as more clearly defined roles and responsibilities. A number of comments reflected a sense of instability in the process and steering committee within the last year. One cited inconsistent attendance. There were also a few comments that raised tensions related to backbone support (where? who?) and leadership for the process.

Capacity to support and manage activities would need to be developed to move forward. In particular, roles and decision-making processes need greater clarity. To build capacity in this

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<sup>8</sup> The survey was adapted from Goodman et al. (1993) cited in Hutchison, K. (n.d.). *What is program sustainability and how can we achieve it?* Community Solutions Planning and Evaluation.

<sup>9</sup> Detailed findings are presented in the January 2015 report SPWB Transition Assessment Survey Summary

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domain most effectively, there needs to be a stronger shared understanding of a common agenda for moving forward.

- **PARTNERSHIPS: How strong are the connections with SPWB stakeholders?**

About half believed that SPWB had good connections with stakeholders, with some participants reporting there needed to be stronger connections to the right community leaders. There would need to be greater development of partnerships to move forward successfully.

- **ADAPTATION: Is the process set up to adapt and ensure its ongoing effectiveness?**

Participants rated SPWB's processes for adaptation fairly well. The majority saw SPWB as having adapted to changes driven by the community and responsive to information about community and sector needs. This responsiveness would be a key piece to move forward.

- **COMMUNICATIONS: Has communication with stakeholders and the public generated support?**

Most participants perceived lower capacity for communications and generating support for the process. They saw gaps in communicating the need for the process as well in building a profile for SPWB.

## Summary

The participants in the transition assessment survey saw the strengths of SPWB as the support from champions and partners. At the same time, they saw the need to build further partnerships with key community leaders and champions. Many also believed that core capacity indicators related to internal capacity, communications, and community engagement were somewhat lacking. This suggests that the transition conversation may need to focus less on parsing up the SPWB process and instead consider reimagining what 2.0 can look like. The vision and relationships are a strong part of the core, the rest can change.



## II.II Turning the Soil

One of the key insights from the transition conversations is the reminder not to confuse decisions and actions that were made in context as either necessary or sufficient to ensure a successful process. With this in mind, and to foster both strategic adaptation and decision-making around what next, a full-day meeting with the SPWB Steering Committee was held in January 2015 to “turn the soil” on the thinking and design of the process.

Turning the soil again reflects attention to resiliency. It allows the space to nurture new ideas and expand thinking on what to regenerate for the next cycle of commitment and investment. The danger in not creating a space to turn the soil is the tendency to see only what is before you, missing other possibilities.

Too narrow a focus on how to sustain SPWB, *as is*, misses the larger questions of what do the social profit sector and the community need to gain greater resiliency and social prosperity? Shared understanding of this need can then be followed by the question of what next and how to adapt SPWB processes and structures to better meet that need.

The January 2015 conversation thus drew from the learnings and insights from the transition assessment as well as their own experience with SPWB to reimagine what a community-driven process for creating greater social prosperity could look like.

This final section shares the outcomes from that conversation.

### ***Taking Stock***

The steering committee reaffirmed the vision of greater social prosperity and enhanced wellbeing. This vision was seen to give the process a unifying direction and entry point for engagement. At the same time, themes related to trust, collaboration, credibility, profile, and community engagement repeatedly surfaced throughout the day. These themes make it clear that:

- **The emergence of FuseSocial changed the landscape, it changed relationships and roles around the SPWB table.**

Its first year of operations necessitated that FuseSocial invest the time in figuring out its contribution and position in the social profit spectrum. It entered that space with high expectations around what it should be and become. Giving the organization the space it needed early in its existence will allow FuseSocial to move forward from a place of strength.

- **Core partners have the task of nurturing their interconnections, mutual trust, and commitment for going forward together.**

The commitment of core partners is demonstrated in the activity and partnership tables presented in Section 1, where there are some who repeatedly showed up and contributed from the very beginning. Moving forward requires that these partners nurture their relationships with each other as well as with new stakeholders and champions.

- **The Strategy Roadmap and the Wellbeing Survey are core assets that can continue to be leveraged.**

The potential of the Strategy Roadmap and Wellbeing Survey is seen as huge. The roadmap provides direction, identifies potential leverage points, and connects sectors around specific issues that contribute to the overall wellbeing of the community. The Wellbeing Survey provides insight into residents' experience of the community. The steering committee identified a clear need to continue to work towards greater use and integration of the Strategy Roadmap and Wellbeing Survey into the culture of the community.

- **Shared ownership and leadership are necessary for the achievement of the vision.**

Both the Strategy Roadmap and the Wellbeing Survey are substantial endeavors. Their potential for catalyzing change within the community is beyond the scope of any one organization. It was believed that sharing ownership for the process and products like the Strategy Roadmap and Wellbeing Survey as well as sharing leadership are needed to ensure both capacity and resiliency. At the same time, it was also cautioned that building shared ownership and leadership takes time, energy and skill. Not everyone gets it at this stage, and the building of ongoing partnerships needs to be strategic at this vulnerable stage.

### ***Moving Forward***

In this moment of maybe, it can be more valuable to take a brief step away from brainstorming activities and refocus the conversation on the desired outcomes and objectives, clarifying the direction that the core partners want to head towards. By the close of the January conversation, consensus had been reached on two key questions to frame any work going forward:



- **How do we as a sector continue to be stronger, more resilient, responsive & remarkable so that we can foster greater community wellbeing?**
- **How might we elevate social innovation to the broader community and within the social profit sector so that we can foster greater community wellbeing?**

For many participants in the January conversation, the place to work on the answers to these questions was through a version of a social profit table, which was seen as the next evolution of the SPWB steering committee.

To achieve a version of SPWB 2.0, it is a worthwhile investment to attend to the needs of the partnership and collaboration itself, including reaffirmation of trust, shared leadership and commitment for moving forward. The 2012 evaluation report reflected on the challenges experienced by SPWB early in the process as a result of trying to build a shared vision, common agenda, strategies and activities *at the same time as* creating partnerships and developing strong relationships. In January 2015, the steering committee recognized the need for both themselves to adjust to new roles and relationships amongst their organisations as well as the need to pull in new champions and leaders from across sectors.

## **In Conclusion**

SPWB created a strong and positive space for change, and now 2015 has got off to a promising start. The process spinoffs, including Convergence and the Wellbeing Survey, continue to inform conversations within the sector. The vision and commitment to social prosperity continue to resound. The relationships and thinking around the table continue to evolve and develop.

In this moment of maybe, there are bright spots of energy. While there does need to be that ongoing space for reflection and the challenging of assumptions, no one has to wait for perfect answers to move forward.

## Appendix A: Evaluation Design<sup>10</sup>

To fit with the complex and emerging nature of the process, a developmental evaluation<sup>11</sup> approach was adopted for Social Prosperity Wood Buffalo. It was designed to make room for uncertainty, to capture emerging outcomes and changes in the project direction, and to foster a culture of reflection and learning. We adopted an action-learning cycle, where periods of activity were paired with observation and assessment to enhance reflection and strategic learning. The analysis focused on characterizing the contribution of SPWB to the social sector.

Throughout the process, the lead evaluator was closely connected to the SPWB project team, participating in planning sessions, attending steering committee meetings and contributing to the implementation of SPWB events. Ongoing observations and insights were shared so that the process could adapt to new learnings.

### *Evaluation Questions*

The evaluation questions were developed to promote learning about both the emergent process and outcomes associated with Social Prosperity Wood Buffalo.

Developmental questions included:

- How does the role of SPWB and the types of activities change over the course of the project?
- What key decisions are being made? What decisions need to be made?
- What contextual influences are facilitating implementation and what influences are hindering its movement forward?
- What are the insights and the lessons learned about core constructs and the social sector in Wood Buffalo?

Outcome and contribution questions included:

- To what extent, and in what ways, are the relationships and connections between stakeholders developing?
- What is the contribution to relevant knowledge and insight?
- What is the contribution of the project to different levels and kinds of capacity?
- Where are the areas of greatest growth and development?

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<sup>10</sup> A more detailed discussion of the evaluation approach, methods and limitations is presented in the 2012 Evaluation Report. <http://bit.ly/1xIR76E>

<sup>11</sup> Patton, M. Q. (2011). *Developmental Evaluation: Applying Complexity Concepts to Enhance Innovation and Use*. New York: The Guilford Press.



- Where are there gaps in creating an impact? What areas need greater support?

### ***Evaluation Strategies***

Multi-method strategies were designed for conducting the developmental evaluation and contribution analysis. Data collection was devised to maximize learning and reflection, as well as capture emerging outcomes. Over the course of the evaluation strategies included:

- **Theory of Change.** The SPWB theory of change was initially designed early in 2012, and refined throughout the subsequent three years. It was used as an analytic framework to track progress and learnings.
- **Tracking.** SPWB activities and outputs were documented throughout the process.
- **Survey.** An online evaluation survey was conducted following each SPWB event.
- **Key Informant Interviews.** Each year of the evaluation, SPWB steering committee members and community partners were interviewed to check in on the process, experiences and emerging outcomes.
- **Capacity Assessment.** In 2012 and 2013, a capacity assessment of social profit organizations was completed. The 2014 capacity assessment was not successful.<sup>12</sup>
- **Social Network Map.** Participants at SPWB events were asked to identify new connections they had made as a result of SPWB.

### ***Analysis***

Quantitative data were analyzed using IBM SPSS Statistics 22 (Statistical Package for the Social Sciences). Quantitative analyses included frequencies and distributions, multivariate analysis of variance (MANOVA), and other correlation analyses to check for relationships between variables. Social Network Mapping was completed using UCINET.

Qualitative data collected through the key informant interviews were subjected to a thematic analysis, which identified dominant themes and issues. As well, the analysis attended to unique insights and perspectives. Responses to open-ended questions on evaluation surveys were summarized according to topic and by frequency.

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<sup>12</sup> A number of issues contributed to the lack of success for the 2014 assessment, including competing events and priorities which detracted from the energy and time spent promoting the survey.