



A REPORT FOR THE POVERTY ROUNDTABLE – HASTINGS PRINCE EDWARD

Evaluation "Engaging Community"
(known locally as "Creating Community" project)

February 2019



An agency of the Government of Ontario.
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EXECUTIVE SUMMARY

Poverty in Hastings and Prince Edward County is endemic and, in many areas, at levels higher than Provincial and Canadian averages. Dealing with such a severe problem, across a large geographic area with both urban and rural poverty, requires a coordinated, informed and professional effort.

It was against this background that the Poverty Roundtable Hastings Prince Edward (PRT) approached the Ontario Trillium Foundation (OTF) to support a foundational project leading to the establishment of a sustainable framework and plan to tackle poverty alleviation across the counties.

This report assesses the outcome of this project to establish a foundation for sustainable action (framework and plan). The report looks at the outcomes of three of the four activities of the project which are the backbone for sustainability and the foundation for future plans and activities. The fourth activity was related to the way the project was conducted – developmental evaluation – or learning and adapting as the project is implemented, which it was observed was central to PRT's methodology and practice.

The PRT achieved strong outcomes in all three activities – engaging and empowering people living in poverty; building multi-stakeholder relationships plus hearing diverse voices; and building awareness and knowledge of poverty and its impact.

Building on the positive outcomes of this project and having developed a viable framework and plan, for the future, the PRT is well positioned to move toward its vision of a community where everyone experiences a standard of living which is sufficient for their physical, social, emotional and spiritual well-being without compromise of dignity and self-respect.

Throughout this project, many lessons have been learned and many doors have been opened for the future work of the PRT.

The PRT are to be commended for their hard work and ability to adapt to changing realities.

It is also important to note the essential role which OTF's support played in this project – a project which has positively impacted the lives of many people living in poverty in Hastings Prince Edward.

BACKGROUND

Located in Eastern Ontario, Hastings County and Prince Edward County (HPE) has approximately 160,000 residents spread across 7,000 square kilometers. Data collected by the Poverty Roundtable (PRT) and its members confirmed that many parts of Prince Edward County and Hastings County have a higher than average prevalence of poverty than Provincial and National figures.

| Low Income Prevalence (HPE – 2015) Selected Communities | | | | |
|----------------------------------------------------------------|----------------|-------------------|-----------------|--------------------|
| 14.2% | 14.4% | 17.6% | 25.4% | 12.9% |
| Canada | Ontario | Belleville | Bancroft | Quinte West |

Statistics Canada – 2016 Census

In Hastings County 1 in 4 children under the age of four live in poverty (based on the low-income measure), and 1 in 5 in Prince Edward County based on 2016 Census data. Census data also indicated that rural poverty is endemic throughout HPE.

The Poverty Roundtable HPE was formed in 2013 to study and address the causes of poverty, and to increase local capacity, knowledge and action. Members include representatives from the social services sector, business, government, health, mental health, education, justice, housing, labour, faith communities, food security, and community members/volunteers. The Roundtable has over 120 active members.

Set up to address the serious and endemic issues of poverty in the two counties, the PRT is led by a Steering Committee consisting of volunteers from member organizations and is led by an Executive Director with a half-time Community Engagement Coordinator.

In 2016 the PRT, under the legal framework of the Community Development Council – Quinte, received a Grow grant from the Ontario Trillium Foundation for \$334,400 to inform a poverty reduction strategy for Hastings and Prince Edward counties. The project, which is nearing completion, has four main activities which will lead to the development of a framework and strategic plan to address poverty in HPE.

EVALUATION OBJECTIVE AND PROCESS

OBJECTIVE

The Ontario Trillium Foundation requires that the outcomes of the project be evaluated. In addition to fulfilling the grant requirement, evaluating outcomes provides feedback to those who were part of the project and to the leadership and governing body of the PRT on the impact of the project. An outcome refers to a change in the behavior, relationships, actions, activities, policies, or practices of an individual, group, community, organization, or institution. (International Development Research Centre)

In accordance with the project objectives and grant requirements, this evaluation will assess to what extent an innovative framework and plan for sustained action on poverty reduction has been developed and will give an assessment on the quality of the framework and plan based on best-practice knowledge.

Project Goal: Change how we (community) thinks about and responds to poverty.

Project Grant Priority Outcome: Diverse groups work better together to shape community

Grant result: People have a say in shaping the services and programs that matter to them.

As a Grow Grant: Project launches, Replicates, or Adapts a new, evidence-based program.

Grant explores and evaluates: Creation of an innovative framework and plan for sustained action on poverty reduction.

EVALUATION PROCESS

As is customary at the end of a project or at critical points in the life of a program, this evaluation is a summative evaluation, judging the outcomes of the project and providing input for future development of the PRT's important work. Outcomes are the specific and incremental changes in behaviour, action, policies, practices and activities that ultimately lead to a desired end-state – in this case, transformative change for people living in poverty and those at risk of poverty.

The evaluation is based on PRT reports (quantitative and qualitative), survey results, published documents, media reports and conversations with the PRT leadership and members of the Steering Committee. The evaluator also had informal discussions on the role of the PRT with several municipal politicians and leaders in the faith community. Over the course of the project, the evaluator observed: several community engagement meetings; public meetings regarding specific poverty-related issues in HPE; and a strategy update meeting with the Steering Committee and PRT's Executive Director at the half-way point of the project.

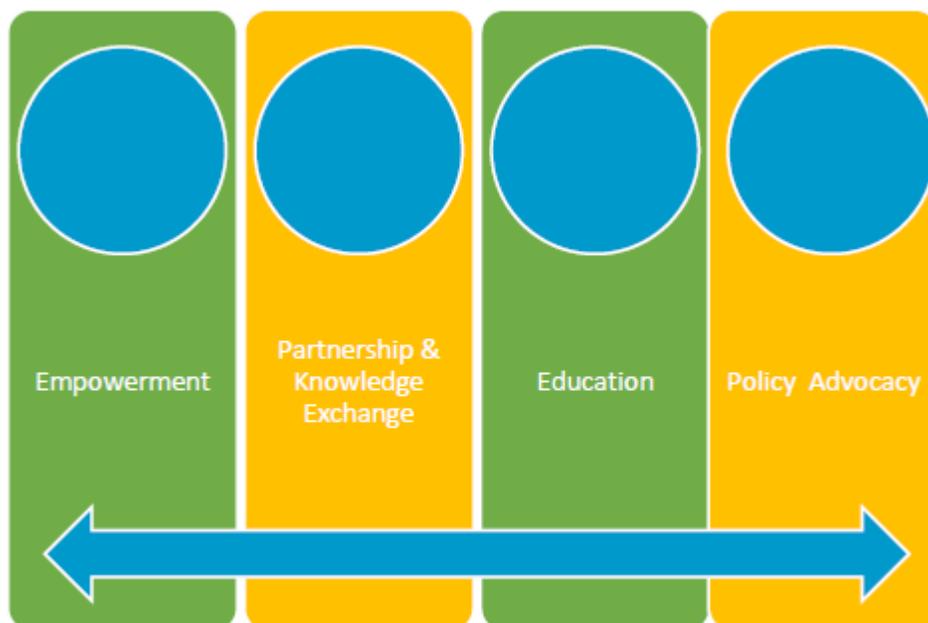
PRT THEORY OF CHANGE

Theory of Change is essentially a comprehensive description and illustration of how and why a desired change is expected to happen in a particular context. It is focused in particular on mapping out or "filling in" what has been described as the "missing middle" between what a program or change initiative does (its activities or interventions) and how these lead to desired goals being achieved. It does this by first identifying the desired long-term goals and then works back from these to identify all the conditions (outcomes) that must be in place (and how these related to one another causally) for the goals to occur.

[Center for Theory of Change](#)

The PRT's Theory of Change involves engaging in actions to increase empowerment (people's capacity and power to influence and shape decisions), in knowledge exchange and

partnership (best practices, research, collaboration), in education (awareness and learning) and policy advocacy (policy change).



It is important to note that any Theory of Change encompasses more than just one project or phase of a longer-term program. Changing behavior and tackling complex social issues of this nature and magnitude can take generations. In addition, the PRT is only one of many actors/stakeholders involved in the change process. Coordination and collaboration between actors/stakeholders are essential to reaching the vision that the PRT (along with other stakeholders) has laid out. As such, change is often difficult to attribute to any one actor/stakeholder – it is the sum of the parts which initiates and accomplishes meaningful and sustainable change.

Using the PRT’s vision statement, documentation and input from PRT staff, the evaluator elaborated the PRT’s Theory of Change to bring a broader context to PRT’s work and longer-term impact (**Appendix A**).

The expanded Theory of Change diagram seeks to identify the various stakeholders involved in this project and required for ongoing change. It also outlines the coordinated activities needed, (along with associated outputs) which will lead to desired outcomes and which will enable transformative change (impact). The outputs of the 3 central activities of this project are identified on the Theory of Change diagram (Objectives 1, 2 and 3) with the 4th activity (processes evaluated, mechanisms and opportunities for action identified) being integral to the way the PRT embraced and utilized developmental evaluation.

From the evaluator’s experience, PRT’s theory of change (as elaborated) is comprehensive, visionary and outlines an effective change process.

PROJECT OUTCOMES - EVALUATION

Over the course of this project the PRT undertook 4 activities in order to facilitate the development of an innovative framework and plan which would support sustained action for poverty reduction. The four activities were:

- 1. People with a lived experience of poverty were engaged and empowered to lead the programs and services that affect them;**
- 2. Multi-sector relationships were developed, and diverse voices were heard regarding poverty reduction in Hastings, Prince Edward counties;**
- 3. A greater awareness of poverty and capacity was built within HPE communities to better understand the complex nature and impact of poverty;**
- 4. Processes evaluated, mechanisms created and opportunities for action identified.**

It is not the purpose of this evaluation to report on the activities per se or how funds were utilized. The PRT will report to the OTF on both these items. This evaluation will touch on whether the outcomes of activities 1 through 3 led to the development of a framework and a plan for future sustainable action.

Activity 4 focused on learning and adjusting – remaining agile- throughout the course of the project. There is clear evidence reflecting the PRT’s commitment to and practice of developmental evaluation. Developmental evaluation is necessary when working in situations of high complexity and on early stage social innovations and calls for planning, acting and evaluation to happen simultaneously throughout the life of the project. The evaluator observed the PRT’s commitment to developmental evaluation both at the local level (adjustment of community engagement process to new learning and input through meeting assessments) and at the leadership level (Steering Committee and Executive Director - mid-project strategy review and adjustments).

The PRT staff and Steering Committee are to be commended for their commitment to developmental evaluation throughout this project.

Developmental evaluation requires that people understand that the evaluation process is in fact part of the work.

A Developmental Evaluation Primer Jamie A.A. Gamble (Published by the J.W. McConnell Family Foundation, 2008)

OUTCOME 1 - PEOPLE WITH A LIVED EXPERIENCE OF POVERTY WERE ENGAGED AND EMPOWERED TO LEAD THE PROGRAMS AND SERVICES THAT AFFECT THEM.

1. EVIDENCE OF ENGAGEMENT WITH PEOPLE LIVING IN POVERTY

Central to this project and its success was the engagement and empowerment of people living in poverty. With this in mind, the PRT undertook a series of community consultations/conversations in 9 communities throughout Hastings and Prince Edward counties.

These conversations had the objective of learning from the experience and successes of people living in poverty. "By listening to personal experiences, we are better able to challenge barriers to reducing and eradicating poverty; by engaging with those who have intimate knowledge of the damage and hardship poverty causes we can partner with them to create positive change." (Leaning In – Community Conversations on Poverty in Hastings Prince Edward – Pg. 4).

The evaluator attended one conversation in Picton as a neutral observer and observed:

- The event was well attended by people living in poverty or who had been living in poverty;
- Beginning with a simple meal, the atmosphere of the meeting was relaxed and was conducive to building trust;
- The conversation was conducted by a trained facilitator and notes were taken by a skilled person;
- Questions were well thought out and designed to elicit comprehensive and thoughtful responses.

What was asked:

1. *What is poverty? Is there poverty in your community? What are its causes?*
2. *What are the impacts of poverty?*
3. *How do we get by?*
4. *What message needs to be heard in your community?*
5. *What is your vision for your community?*
6. *How do we solve poverty?*

The community conversations produced clear descriptions of the experience of poverty; what people living in poverty felt were the causes of poverty (including issues related to keeping people trapped in poverty; and suggestions for what helps to both cope with and overcome poverty. The findings and recommendations were summarized and became foundational to other parts of the project.

A significant outcome of the Community Conversations was the Moving Forward Report which was developed from the input of more than 500 community members – many whom were living in poverty. Consolidating input from participants, the Report delivered 9 clear

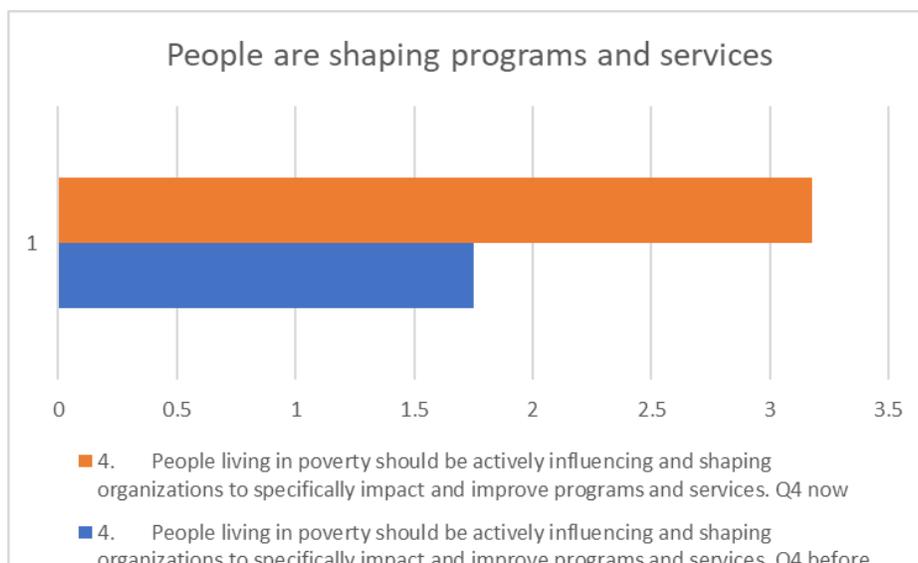
recommendations for action across HPE’s member communities. The Report identified roles for the community, Municipal, Provincial and Federal governments with respect to the 9 focal areas.

Other examples of engagement/consultation of people with a lived experience of poverty would include the following forums (number of participants in brackets):

- provincial and federal consultations for the creation of a rights-based approach to housing (25);
- planning around affordable housing locally (90);
- engaging directly with organizations in change work so that the people who use services are shaping programs and services (43);
- discussions on partnership and collaboration with other groups support community planning through multi-sector tables (62); and
- discussions on reducing barriers to employment (14).

In terms of engagement of people with lived experience in the overall project, in 2018 there were 206 new people with a lived experience of poverty who participated in a meeting, workshop, educational forum, presentation, training or other event, 135 (people with a lived experience of poverty) who re-engaged (i.e. involvement with the PRT in a previous year).

A survey conducted by the PRT in 2018 with its members (which included people living in poverty) indicated that there had been a large perceived change in the engagement level of people with a lived experience of poverty. Participants filling in the survey were asked to grade the actions from 0 to 5, identifying where the PRT had started in 2016 to how far the efforts of the PRT had moved the needle in 2018. **Orange** represents 2018 perceptions and **blue** the starting point.



CONCLUSIONS

Based on the material reviewed, people with a lived experience of poverty were effectively engaged throughout this project. Engagement with people living in poverty provided insights which were essential to formulating an ongoing plan and framework for future poverty reduction activities.

As noted in the PRT's documentation, it was challenging to engage with the "working poor" during this project. It was noted that the working poor struggle to find the time and the resources (transportation, daycare) to participate in activities such as the Community Conversations. There is no doubt that additional important insights regarding poverty in HPE could be gathered from this group. Going forward, it will be important for the PRT to find the means/methods to engage with, learn from and support this group.

2. EVIDENCE OF PERCEIVED EMPOWERMENT OF PEOPLE LIVING IN POVERTY

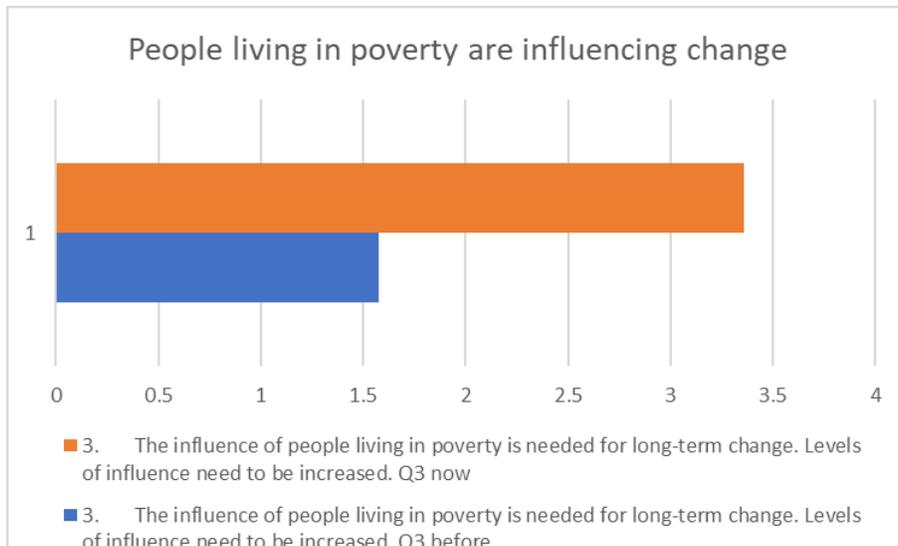
In addition to taking a highly participatory approach to this project, the PRT also sought to provide learning and growth opportunities for people living in poverty in order to develop skills, abilities and confidence leading to empowerment. Considerable progress was made in providing people living in poverty with the tools to build skills and confidence along with opportunities to engage with the activities of this project.

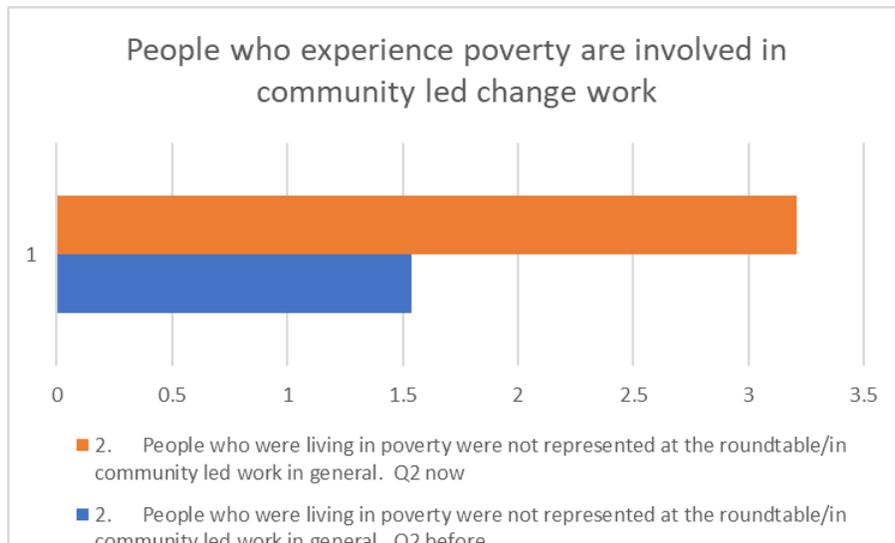
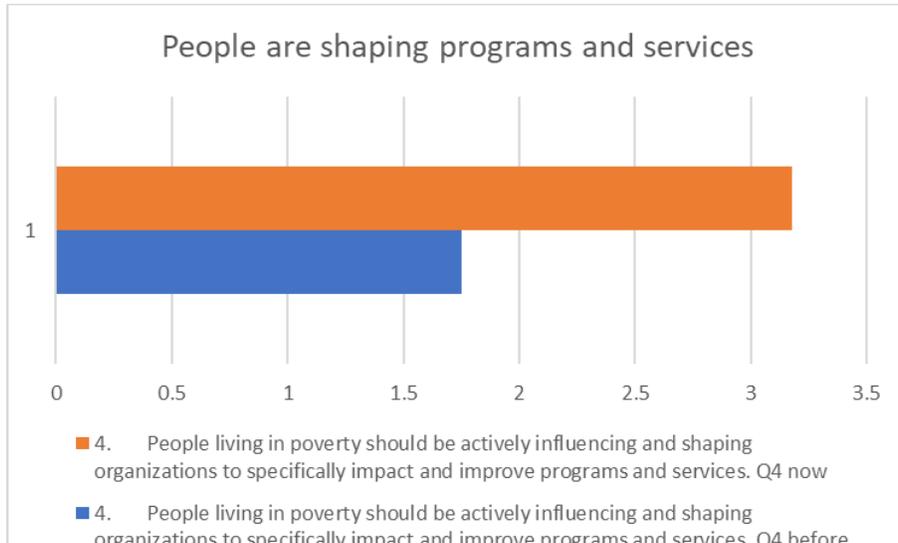
Examples

- A. The Poverty Roundtable established a Speakers Bureau in the second year of the project. Participants were given training in speech preparation, public speaking and media engagement. Members of the Speakers Bureau spoke at PRT meetings, public meetings and to municipal politicians. Several members of the group took part in a highly impactful event – the [Human Library](#) – at the Belleville Public Library. Many of the participants of the Speakers Bureau have gone on to become the PRT Advisory Council – Voices of HoPE. The Advisory Council is comprised of people with a lived experience of poverty and provides the PRT and other service providers and community organizations, with ongoing input from people who experience poverty and its consequences.
- B. PRT members living with poverty engaged in discussion and provided input to the Federal Government's National Poverty Reduction Strategy.
- C. The PRT facilitated an all candidates meeting during the 2018 Provincial Election. Candidates were able to hear firsthand from people living with poverty, their struggles, aspirations and suggestions for change.

- D. Members of the Voices of HoPE gained the skills needed to engage with the media on several important topics related to poverty. [Social Security](#) [Precarious Employment](#) [and Health](#).
- E. People living with poverty were given the opportunity to learn about governance with the objective of becoming board members of and/or providing advice to local organizations which are involved in poverty related issues affecting communities across the two counties.
- F. A tool (and workshops) was developed to offer a practical approach for engaging people with experience of poverty in poverty reduction work and within organizational structures to influence programs and changes that impact them. 'Creating Community – a Tool for Engagement' workshops are co-facilitated by PRT staff and a PRT member with lived experience of poverty.

With reference to the PRT's survey in 2018, members felt that significant progress had been made over the course of the project in both the involvement and impact of people living with poverty. It was also felt that people with a lived experience of poverty had increased their ability to influence change.





CONCLUSIONS

From the evidence presented, the PRT has made an effective start with respect to empowerment of people with a lived experience of poverty, ultimately enabling their participation in shaping the programs and services that affect them. While PRT could have hoped for larger numbers, the quality of training and opportunities to become actively involved point to a high level of empowerment. Survey results and the associated comments reveal that those who did engage felt that their ability to bring change had significantly improved.

The outcome of this first activity - engaging with and empowering people living in poverty - has provided PRT with effective methods and tools for the future success of the PRT's work which is founded on a rights-based approach ("nothing about us, without us").

OUTCOME 2 - MULTI-SECTOR RELATIONSHIPS WERE DEVELOPED AND DIVERSE VOICES WERE HEARD REGARDING POVERTY REDUCTION IN HASTINGS, PRINCE EDWARD COUNTIES

From its inception (and largely as result of this project), PRT membership has grown to over 510 members from across HPE counties. There is a core membership of people coming from a lived experience. Initially starting as a group of social sector organizations, PRT now has members from business (including Chambers of Commerce), municipal government, faith-based organizations and from the health sector.

A significant number (53) of new partnerships have formed through involvement of agencies participating in Community Conversations and their desire to be part of the working groups formed around specific topics. These partnerships involve agencies representing the health, social, education, faith sectors along with government particularly at the municipal level.

A review of PRT membership demonstrates the diversity of those involved. Membership includes youth, college students, families with young children, persons with disabilities, seniors, individuals on Ontario Works, and people with precarious employment.

The Creating Community program has largely been responsible for enabling new partner relationships and deepening others.

Representatives from all levels of government have engaged with activities of the PRT over the timeframe of this project and at differing levels. Confirmed by a review of municipal council agendas (Belleville, Quinte West) the PRT has been welcomed to speak to local government on poverty in general and important poverty related topics. Senior representatives from local government attended the PRT meetings including the ongoing attendance of the mayor of Quinte West.

Engagement with municipal, provincial and federal levels of government produced positive outcomes with respect to poverty reduction in HPE over the course of the project. While attribution for change is always challenging, it is the opinion of the evaluator that the PRT played a significant role in supporting several key poverty alleviation initiatives.

- At the municipal level, based on input from members, the PRT announced a housing crisis in August 2017 and followed up with local mayors, deputations to councils and support multiple working groups in HPE focused on affordable housing in 3 municipalities. PRT's efforts led to some concrete outcomes including budget contributions to the creation of new affordable housing. The PRT also was requested

to and did provide a report and recommendations with respect to the issue of payday lenders, leading to both awareness and action in the City of Belleville.

- Provincially, the PRT provided community-based research and lived experience testimony to support increasing the minimum wage and improving employment standards. Bill 148 was passed by the previous Liberal government. PRT provided support (research and partnership) to one of its members to address reducing Hydro rates in rural Ontario. The PRT provided community-based research to the 2018 Ontario budget which included several important commitments to poverty reduction (housing benefits, transportation, mental health, etc.)
- The PRT also hosted a meeting with the current Minister responsible for social assistance and the local MPP at which members, including those with experience of poverty, expressed concerns and provided recommendations to assist the current provincial government with its planning for social assistance reform.
- At the Federal level, the PRT supported local MPs in their efforts to provide evidence-based input to the National Poverty Reduction Strategy resulting in key changes to the Federal Child Benefit and the Working Income Tax Benefit.

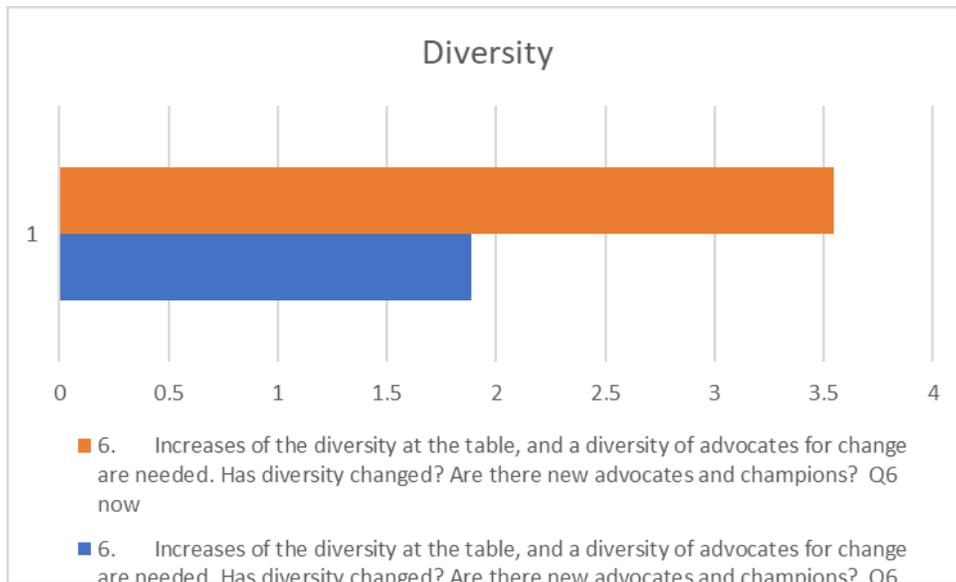
As mentioned earlier, it is not the intention of this evaluation to address Activity 4 (Processes evaluated, mechanisms created and opportunities for action identified.) However, PRT's identification of and response to urgent needs (affordable housing) and opportunities (government consultation) in the communities it serves, underlines its commitment to and practice of developmental evaluation.

Particularly encouraging has been the engagement with PRT of 3 Executive Directors of local Chambers of Commerce. In their role vis-à-vis economic and social development, they have recognized the importance of hearing from multiple and diverse voices on issues impacting their members and the communities in which they operate.

The Poverty Roundtable joined [Cities Reducing Poverty](#) which supports efforts to engage with both the business community and municipalities. PRT members, including municipal and business representatives, have attended Cities Reducing Poverty conferences to support moving forward together to address local issues. PRT staff and members have also contributed to this national network by providing webinar and conference presentations.

The PRT developed and implemented a Community Champions program to recognize and reward community members who support poverty reduction. The Community Champions program received attention from both PRT members and the community at large – focusing attention on poverty reduction issues and effective strategies to address those issues. The Community Champions program has the potential to be an effective way to enlighten and engage the business communities throughout HPE.

With reference to the 2018 PRT survey, there are clear indications that members perceive that there is more diversity around the table and that diversity is leading to better outcomes and increased impact.



CONCLUSIONS

A careful review of the material provided along with the evaluator's own observations/conversations indicate that many multi-sector relationships were developed and that diverse voices were heard regarding poverty reduction in Hastings, Prince Edward counties. It was heartening to see relationships develop between different organizations which had previously not worked together. It was also evident that PRT had the ability to bring stakeholders from many different sectors/life experiences to address issues related to poverty alleviation (affordable housing). Throughout the project, it was also evident that the voices of those living in poverty were heard and respected.

OUTCOME 3 - A GREATER AWARENESS OF POVERTY AND CAPACITY WAS BUILT WITHIN HPE COMMUNITIES TO BETTER UNDERSTAND THE COMPLEX NATURE AND IMPACT OF POVERTY

Awareness of poverty and capacity for action was built throughout HPE communities in several ways.

The Community Conversations and associated reports ([Leaning In](#) and [Moving Forward](#)) developed awareness of the complex issues and the impact of poverty throughout the community, local government and for people living in poverty, along with the priorities for poverty reduction in HPE. Over 1,400 people were reached by this community engagement process.

Awareness and understanding were broadened to the general public through media coverage of PRT's activities and the issues raised. Articles covered not only activities of the PRT but also the insights to issues related to poverty throughout the various communities. It is interesting to note that the Voices of HoPE/Speakers Bureau attracted a great deal of media coverage - [In Quinte.ca Media - Poverty Roundtable - Poverty Roundtable HPE - News](#). Media coverage included a series of opinion pieces entitled "Poverty Matters" which highlighted specific issues from the perspective of a person living in poverty.

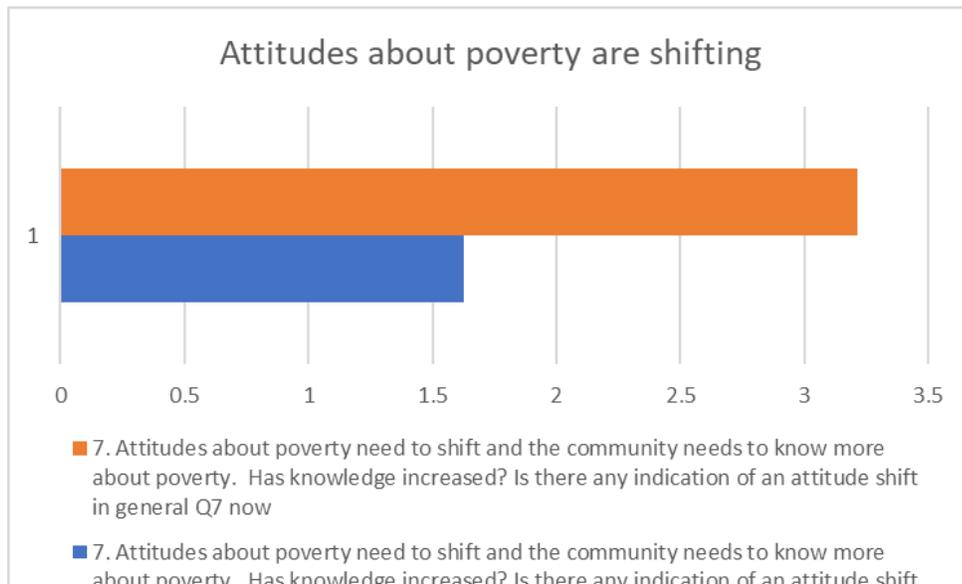
The PRT also used external events to raise awareness of poverty and its complex nature, in the HPE region. PRT organized members to provide input on the Federal Government's National Poverty Reduction Strategy. In addition to providing direct and relevant input, all of PRT's activities and suggestions were reported back to members and to the general public.

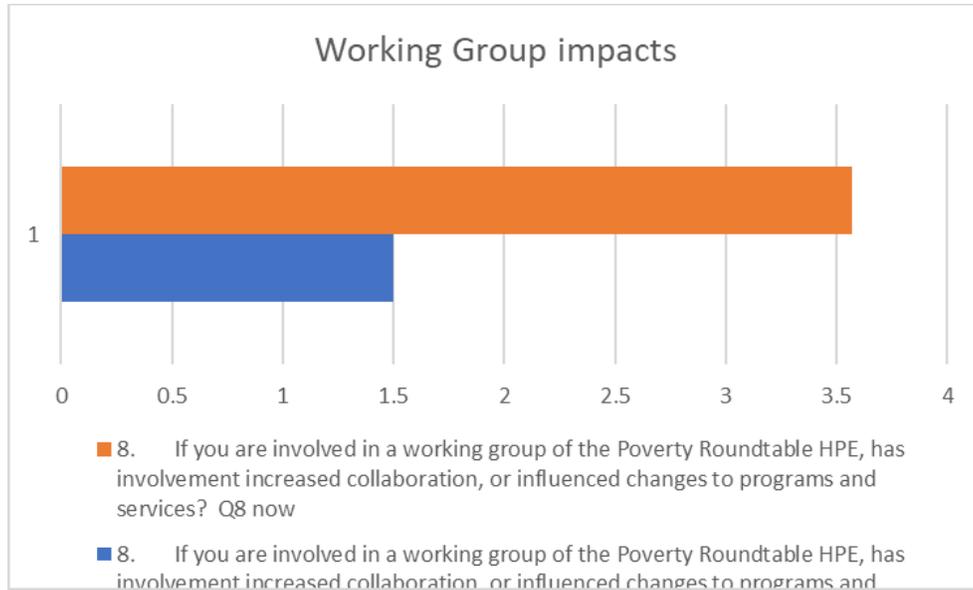
Particularly effective with respect to raising issues was the PRT organized all-candidates meeting during the 2018 Provincial election. [PRT - Provincial Candidates Meeting](#) Several hundred people (many non-members of PRT) attended and received information on poverty issues in HPE in addition to hearing the candidates' responses/party platforms.

Prior to the municipal elections in fall 2018, the PRT hosted four municipal information sessions to provide an opportunity for candidates and community members to engage with issues of affordable housing and broader community action on poverty.

The PRT includes working groups to identify systemic issues and structural barriers faced by individuals experiencing poverty and prioritize those needs for broader action. Looking at key issues, the working groups provided deeper insights into priority issues and brought together people from diverse backgrounds (for example a local mayor joined the housing working group along with a Home Builders Association, CMHC representative, a private developer and people who are struggling to find suitable and affordable housing). Working groups have greatly added to the awareness of issues but have also created wide ranging capacity to tackle poverty reduction issues.

With respect to the 2018 PRT members’ survey, feedback indicates that attitudes towards poverty are shifting and that the efforts of the various working groups are effective.





CONCLUSIONS

Through the many activities of the PRT - community conversations, engagement with media, Speakers Bureau, identification of urgent issues – it is evident that a much greater awareness of poverty and capacity has been built within HPE communities. The reports produced were professional and conveyed information in a clear and professional manner. The PRT had positive engagement with local media leading to frequent and lengthy articles on the issues related to poverty in HPE. Again, the voices of people living in poverty were clearly heard. In the opinion of the evaluator this was a positive outcome which enabled a better understanding of the complex nature and impact of poverty throughout HPE.

OUTCOME 4 - THE PROJECT RESULTED IN AN INNOVATIVE FRAMEWORK AND PLAN THAT WILL SUPPORT SUSTAINED ACTION FOR POVERTY REDUCTION

An important outcome of the project was the development of community awareness and resources which ultimately led to PRT having a framework and plan for sustained action.

The project enabled PRT to identify nine priority areas requiring further urgent action. To address these priority areas the PRT has developed a 3-year strategic plan covering the years 2018-2021 which includes a revised organizational framework.

Building on the positive outcomes of the current project (Creating Community), the PRT will continue:

- Working groups (housing, income security, food security)
- Project groups (Example - focus on removing barriers to employment and community benefits)
- Ad-hoc task groups (Example – to encourage community participation during elections)
- Voices of HoPE (People living in poverty advisory council)

The PRT will continue its four primary activities as reflected in its Theory of Change:

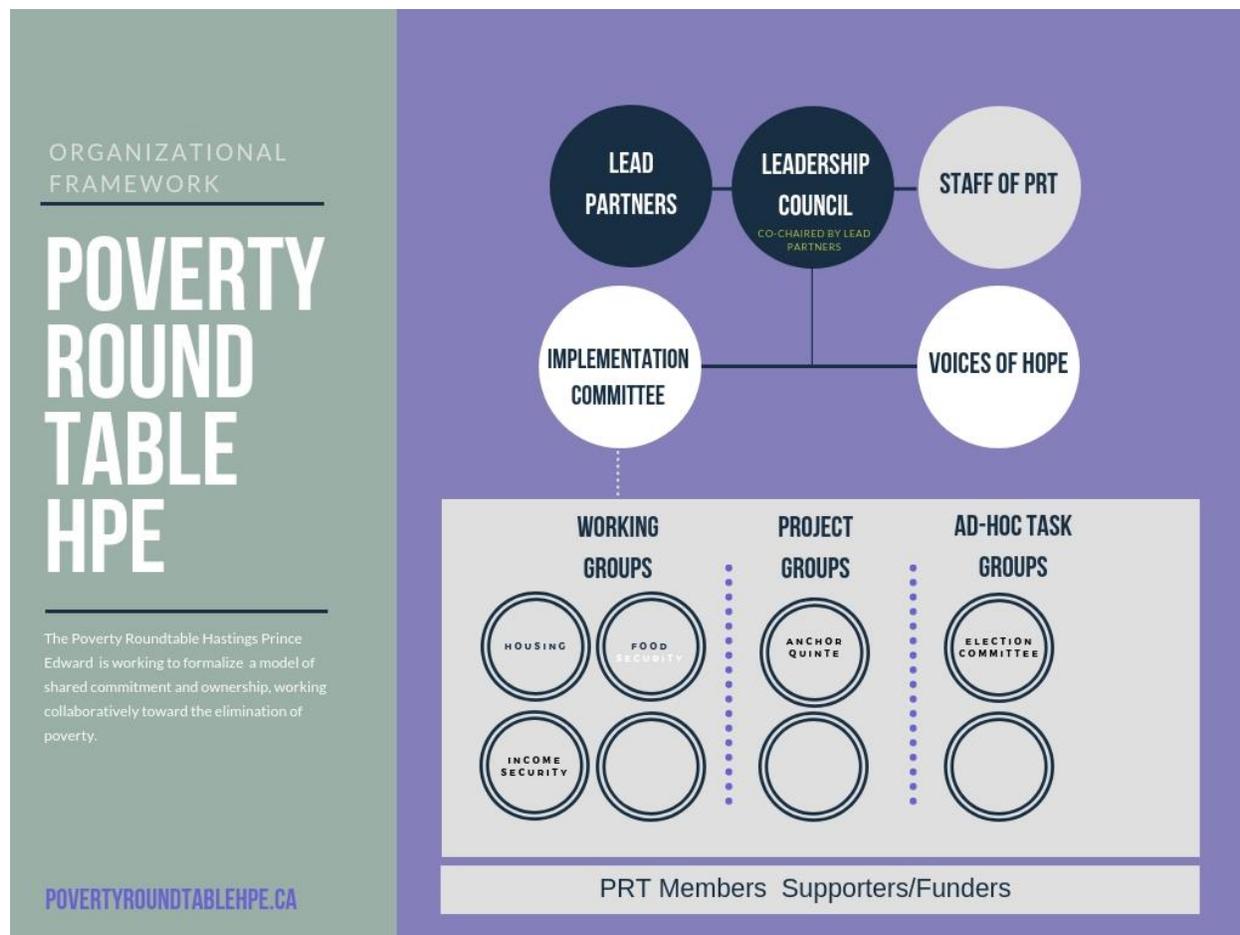
- Empowerment
- Partnership and Knowledge Exchange
- Education
- Policy and Advocacy

In addition to continuing its work on housing security, income and employment security and food security, the PRT will promote the development of working groups on financial empowerment, rural equity, belonging and inclusion, families and caregivers support, health equity and transportation access.

With respect to the elaborated Theory of Change, PRT's plan will include targeted interventions and the promotion of effective policy and practice.

The PRT and its members have elaborated an organizational framework to address some of the challenges of the previous structure. For example, in reviewing the project reports, it was noted that there were no formal Memorandums of Understanding (MOUs) between the various partners. This meant that negotiations for support and involvement were ongoing throughout the project rather than having been established at the beginning. This resulted in much of the responsibility for implementation being placed on the staff of the PRT (1.5 full time equivalents). Given this project's geographic scope and complexity, this was a stretch for PRT's staff. The revised structure and associated agreements are designed to share and assign the work between the PRT and its members.

Proposed Organizational Framework - PRT



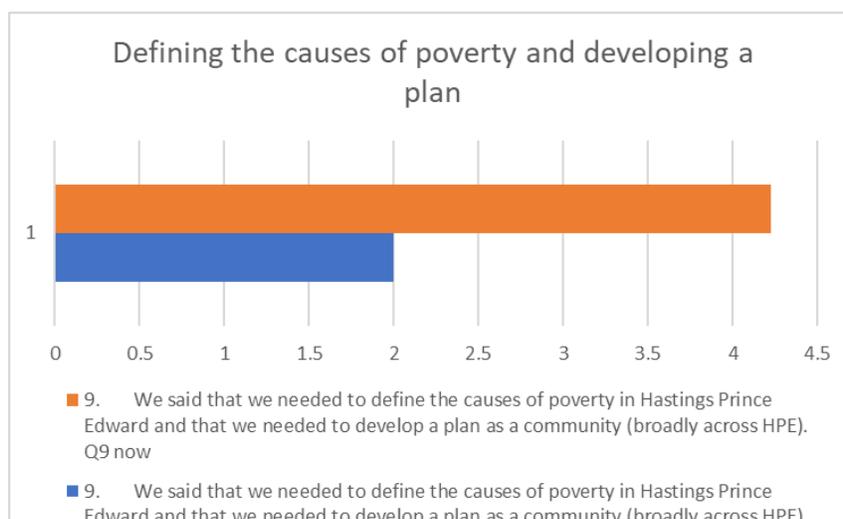
| PRT Organizational Components | Comments |
|----------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| 1. Lead Partners – Joint Venture | <p>Discussions are underway to have two (or more) key local organizations form a partnership to provide governance, leadership and a framework for the PRT’s ongoing work. The organizations will commit “backbone” resources and their respective Boards will also approve strategy.</p> <p>An effective way to establish such a partnership would be via a Joint Venture Agreement between the organizations.</p> <p>A joint venture is an effective way to establish an appropriate legal framework while maintaining the community action spirit of the PRT.</p> |

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| | <p>It will be important for the organizations involved in such an agreement to ensure they comply with the Canadian Revenue Agency’s requirements for joint venture agreements.</p> <p><u>CRA Document - Appendix B - Joint Venture Agreements</u> This would include:</p> <ul style="list-style-type: none"> • presence of members of the charities on the governing body of the joint venture (PRT) • presence in the field of members of the charities • joint control by the charities over the hiring and firing of personnel involved in the venture • joint ownership by the charities of any assets and property • input by the charities into the venture's initiation and follow-through, including the charity's ability to direct or modify the venture and to establish deadlines or other performance benchmarks • signature of the charities on loans, contracts, and other agreements arising from the venture • review and approval of the venture's budget by the charities, availability of an independent audit of the venture, and the option to discontinue funding when appropriate • authorship by the charities of such things as procedures manuals, training guides, and standards of conduct • on-site identification of the venture as being the work, at least in part, of the charities |
| <p>2. Leadership Council</p> | <p>Significant involvement of key organizational stakeholders in the work of the PRT will be facilitated by the establishment of a Leadership Council.</p> <p>Comprised of between 10 to 12 individuals and/or agency representatives, the Leadership Council will be decision-makers within their own organizations who have the authority to commit resources to the work of the PRT.</p> <p>Members of the Leadership Council would include public sector organizations, collaborating organizations, key community members and representatives from the Working Groups. People with a lived experience of poverty would also be encouraged to join the Council (the vision is that over time up to 50% of the members of the Council would have a lived experience of poverty)</p> <p>The roles and responsibilities of Council Members would be clearly outlined and Memorandums of Understanding defining their support of the PRT would be established for organizations represented on the Council. Organizations/Agencies would be identified as PRT partners.</p> |

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| | <p>The Council would be accountable to the community through monitoring of and reporting on PRT activities.</p> <p>The Leadership Council would be expected to support the PRT’s positive culture which values diverse perspectives/approaches and is respectful but honest.</p> <p>The Council is expected to:</p> <ul style="list-style-type: none"> • Commit to and protect the mission of the PRT; • Be responsible for establishing strategic priorities (including the development of a strategic plan for the PRT); • Be responsible for the implementation of the poverty reduction strategy; • Recognize opportunities and promote best practices; • Support the implementation of the PRT strategic plan by contributing/mobilizing skills, expertise and resources of their organization to operations/implementation; • Provide oversight of the partnership and working groups/task groups, ensuring their alignment with overall PRT strategy; • Provide linkages to strengthen relationships within and across sectors. |
| PRT Staff | <p>Staffing of the PRT will largely depend on funding and future project requirements.</p> <p>As such, staff needs will be developed as new projects are planned and implemented.</p> <p>Having dedicated PRT staff will be important going forward to lead implementation, coordinate activities and be a face of the PRT to the community and the many stakeholders.</p> <p>In particular, it will be important for the PRT to continue with an Executive Director. The Co-Chairs of the Leadership Council and other key volunteer leaders are fully engaged in their own work and it will hinder the PRT if it doesn’t have an Executive Director.</p> <p>In addition, having a dedicated and competent spokesperson will continue to support the PRT’s effective engagement with the media/public and with local government.</p> <p>The PRT has established important external relationships (Vibrant Communities) which will also need PRT executive staff focus and nurturing.</p> |
| Implementation Committee | <p>The Implementation Committee facilitates core partners coming together to plan implementation of strategic goals and actions.</p> <p>The Implementation Committee will act somewhat like a project advisory committee but will be hands-on with a more active/participatory role.</p> |

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| | <p>The Committee will assist staff with assessment, planning and operational decisions. This will include making operational decisions which are time sensitive and for which the Executive Director needs input. The Implementation Committee will participate in community engagement and capacity building. They will support and participate in the development and growth of working groups.</p> <p>In addition, the Committee will develop a mentorship program with working and project groups.</p> |
| <p>Working and Project Groups</p> | <p>Each working group will address a particular issue and be led/mentored by a lead agency which is active/expert in that field.</p> <p>The working group model is an effective one and it is wise to add the oversight/sponsorship of a lead agency to ensure the clear direction, adequate resourcing and effective reporting of each group.</p> |
| <p>Voices of HoPE</p> | <p>Voices of HoPE is proposed to be an advisory council to the PRT and to other organizations in the two counties, both providing lived experience knowledge to PRT’s activities and as a resource to the community.</p> <p>It will be important for PRT to ensure that this group continues to both grow in numbers and is encouraged/capacitated to join the Leadership Council and Work Groups.</p> <p>Given PRT’s commitment to a rights-based approach the Voices of HoPE is key to ultimately achieving the empowerment and engagement of people living in poverty.</p> <p>It will also be important to look for ways to bring more people into this group who are both working and poor.</p> |

In reviewing the 2018 survey results, PRT’s members felt that much progress had been made in both defining the causes of poverty and developing a plan to continue to address issues of poverty reduction.



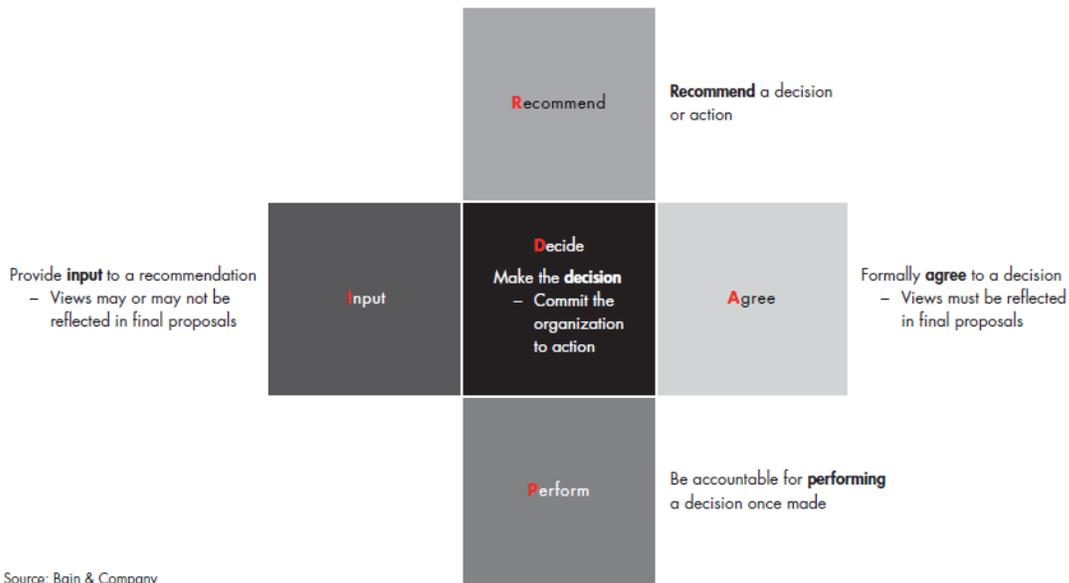
CONCLUSIONS

The project has resulted in the development of a framework and plan which will support sustained action for poverty reduction.

The vision, mission, values developed in the project will be carried on throughout PRT’s work. Over the course of the project, the PRT established effective engagement techniques with the affected communities building avenues of communication and networks for future activities. The PRT has gleaned important action points from the project activities which will be the focus of its work in the foreseeable future. In addition, advocacy and education groups have been formed which will continue as the PRT enters the next phase of its work.

The PRT has a viable framework which builds on the strong community action spirit and involvement which the PRT has helped develop throughout HPE. The framework and plan also have taken into account the interest and support of potential lead partners, who will provide the leadership and legal framework for PRT to continue its important work.

With a strong culture of inclusivity, the PRT framework at first appears complex. However, the complexity can be overcome as the PRT clearly defines and documents the roles, responsibilities, and relationships of each member in the framework – from Lead Partners to Ad Hoc Task Groups. In today’s disruptive environment, agility is a key attribute for organizations dealing with complex problems such as poverty alleviation. Agility is only possible with organizational structures that clearly define leadership, management and implementation roles and responsibilities. To this end, it would be worthwhile for the PRT to develop a responsibility matrix such as Bain and Company’s RAPID model – pictured below:



A responsibility matrix will define where decisions are made (Leadership Council, PRT Staff, etc.) who makes recommendations and to whom, and ultimately who implements decisions.

It is important to note that the PRT has thought carefully about how to increase the role and engagement of people living in poverty. Their empowerment and strong engagement are key to a rights-based approach – a strong value of PRT’s work.

EVALUATION OUTCOMES AND RECOMMENDATIONS

The PRT is to be commended for the successful implementation of this complex project. Given the size of Hastings, Prince Edward counties, the different realities between rural and urban poverty and the need to engage with so many stakeholders, having accomplished so much in such a professional manner is indeed commendable.

The project achieved its important outcomes. It was clear that people with a lived experience of poverty were engaged and empowered to lead the programs and services that affect them. Engagement with people living in poverty provided insights which were essential to formulating an ongoing plan and framework for future poverty reduction activities.

As noted in the PRT’s documentation, it was challenging to engage with the “working poor” during this project. It was noted that the working poor struggle to find the time and the resources (transportation, daycare) to participate in activities such as the Community Conversations. There is no doubt that additional important insights regarding poverty in HPE could be gathered from this group. Going forward, it will be important for the PRT to find the means/methods to engage with, learn from and support this group.

It is also clear that the PRT has made an effective start with respect to empowerment of people with a lived experience of poverty, ultimately enabling them to lead the programs and services that affect them. While PRT could have hoped for larger numbers, the quality of training and opportunities to become actively involved point to a high level of empowerment. Survey results and the associated comments reveal that those who did engage felt that their ability to bring change had significantly improved.

It could be clearly seen that multi-sector relationships were developed, and diverse voices were heard regarding poverty reduction in Hastings, Prince Edward counties. It was heartening to see relationships develop between different organizations which had previously worked less collaboratively. It was also evident that PRT had the ability to bring stakeholders from many different sectors/life experiences together, in order to address issues related to poverty alleviation (affordable housing). Throughout the project, it was also evident that the voices of those living in poverty were heard and respected.

It was apparent that a greater awareness of poverty and capacity was built within HPE communities to better understand the complex nature and impact of poverty. Through the many activities of the PRT - community conversations, engagement with media, Speakers



Bureau, identification of urgent issues – a much greater awareness of poverty and capacity was built within HPE communities. Throughout the project, it was evident that the voices of people living in poverty were clearly heard which facilitated a better understanding of the complex nature and impact of poverty throughout HPE.

The PRT has gleaned important action points from the project activities which will be the focus of its work in the foreseeable future. In addition, advocacy and education has been undertaken and will continue as the PRT enters the next phase of its work.

The PRT has developed a viable framework and plan which builds on its history as a community led organization and which draws on the strength of key lead partners. The framework and plan will support the work already underway and will enable the PRT to add other priority areas to its activities. It will be important for the PRT to clearly define the roles and responsibilities of each stakeholder group in the framework – ensuring efficient decision-making and effective implementation.

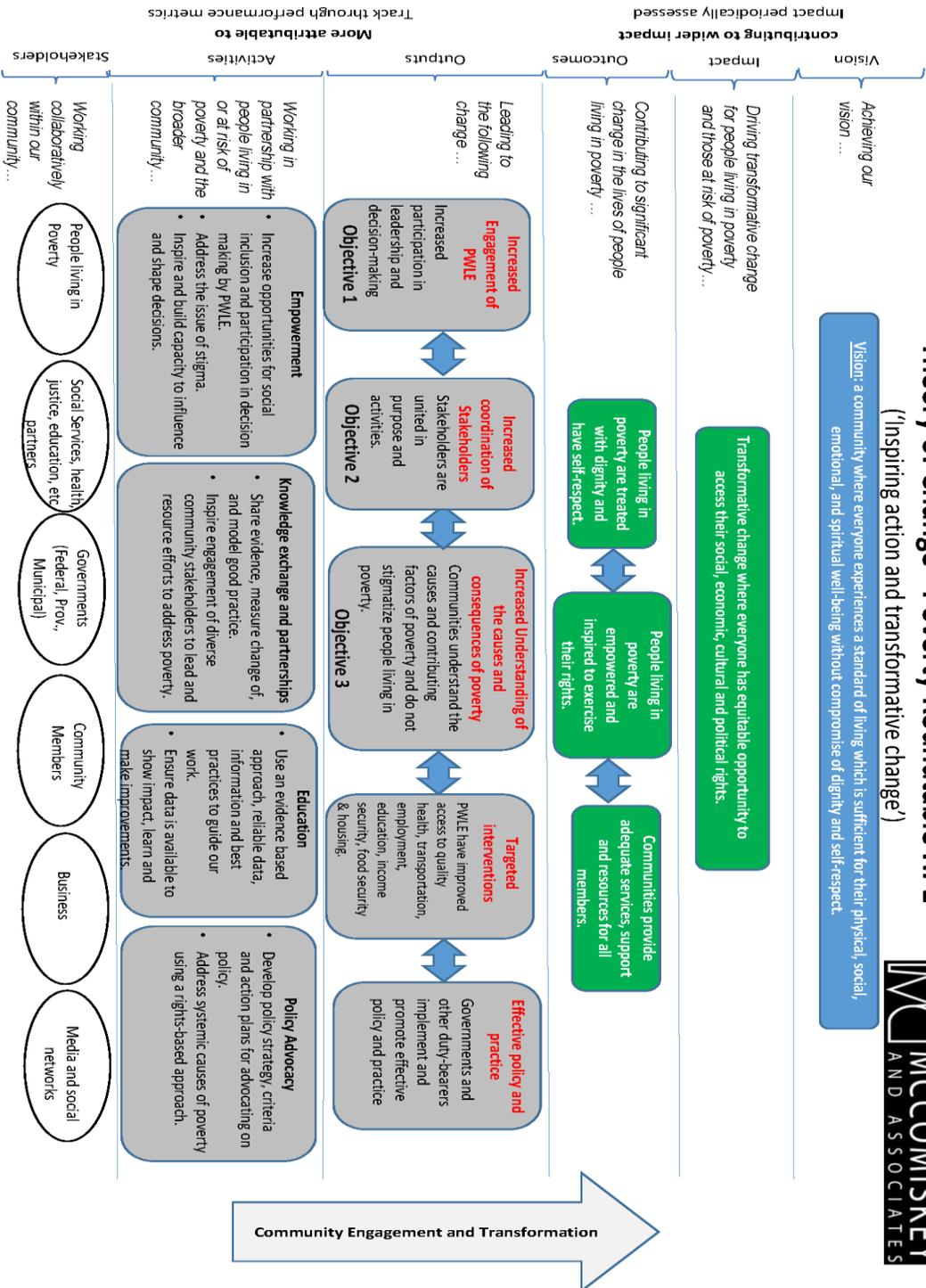
Going forward, it is encouraging to see that PRT has captured lessons learned and will ensure that partnerships are formalized through MOUs and partnership agreements. This will clearly define each partner’s contribution to the PRT’s work and their responsibilities.

An important outcome of the project has been the development of data/knowledge/tools that will inform ongoing work in the community. The Creating Community project has contributed to an environment for collective work on poverty to be deepened and advanced.

Respectfully submitted,

Dave McComiskey

APPENDIX A – ENHANCED THEORY OF CHANGE



APPENDIX B – JOINT VENTURE AGREEMENT GUIDELINES

The following are the type of factors the CRA looks for when determining whether a charity directs and controls the use of its resources in a joint venture:

- presence of members of the charity on the governing body of the joint venture
- presence in the field of members of the charity
- joint control by the charity over the hiring and firing of personnel involved in the venture
- joint ownership by the charity of foreign assets and property
- input by the charity into the venture's initiation and follow-through, including the charity's ability to direct or modify the venture and to establish deadlines or other performance benchmarks
- signature of the charity on loans, contracts, and other agreements arising from the venture
- review and approval of the venture's budget by the charity, availability of an independent audit of the venture, and the option to discontinue funding when appropriate
- authorship by the charity of such things as procedures manuals, training guides, and standards of conduct
- on-site identification of the venture as being the work, at least in part, of the charity

For joint ventures, the charity should make sure that it regularly receives complete financial information for the whole venture. It should also have enough documentation to show how its contribution fits into the overall undertaking, and how its resources have been devoted to activities that further its charitable purposes.



ABOUT DAVE MCCOMISKEY AND ASSOCIATES

Dave McComiskey And Associates provides full consulting services to the not-for-profit sector including strategy formulation, governance and leadership training, and organizational/project evaluation.

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