Alternative/Training Businesses:

New Practice, New Directions

Final Report

Submitted By:

Eric Shragge, Kathryn Church, Jean-Marc Fontan, Élaine Lachance

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Alternative/Training Business: New practice/New directions

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Introduction

Alternative/Training Businesses : New Practice /New Directions is a project that has been carried out between 1998-1999. It has brought together researchers and practitioners from universities and the community sectors in Montreal and Toronto. It is a project that links new forms of community practice with the question of how to evaluate these new forms. As in many projects, the answer was complex. In this final report for the project, an overview of the project will be presented, as well as some of the major findings and orientations that we have developed.

The following are members of the project team: Eric Shragge, School of Social Work, McGill University, project coordinator; Kathryn Church, independent researcher affiliated with Action Learning, 761 Community Development Corporation, Toronto Coordinator; and Jean-Marc Fontan, Sociologie, Université du Québec à Montréal, co-researcher, Élaine Lachance, Montreal Coordinator. Mike Toye, and Danièle Bordeleau h were hired as project staff. An advisory group, active at the beginning of the project and helped shape it consisted of Lucie Chagnon, Jeanne Doré, and Pierre Legault in Montreal, and Diana Capponi, Rick Ciccarelli, and Laurie Hall in Toronto. Évariste Thériault of HRDC participated as an advisor in the project.

This project began with discussion between Jean-Marc Fontan and Eric Shragge from Québec who had writing together for several years on issues related to Community Economic Development (CED). They had collaborated on an a presentation and subsequently a book chapter on the issue of unemployment and some of the approaches used by CED organizations to counter it. A subsequent project was an analysis of Chic Resto-Pop one of the "entreprise d'insertion", a form of practice as alternative to the more traditional approaches to preparing people for the labour market. Kathryn Church had been working with and writing for and about the consumer/survivor movement (people who have been through and survived the psychiatric system) in Ontario for many years and more recently on the Alternative Businesses established by that movement. The idea was to bring together practitioners and researchers with these interests and begin a discussion of the new forms of practice and how it can be evaluated. As a group, we learned from the differences and at the same time developed a common framework for evaluation. The tensions between difference and commonalities was present in a way that challenged and strengthened the project.

1. Project Objectives:

The project proposal listed the following objectives:

1. To describe the practices of training/alternative businesses, and to examine the approaches to practice and the new models that have developed in recent years.

2. To develop a guide to evaluate these projects. This guide will be derived from the experiences of the groups and from the issues and results that the training businesses wish to see evaluated.

3. To evaluate the impact of training/alternative businesses on the lives of those who participated in their programs, including their subsequent employment and education and personal /social development.

4. To determine the conditions that contribute to and maximize the possibilities of successful functioning of training/alternative businesses. This includes both the internal and external conditions that have an impact on the training/alternative businesses.

5. To carry out an evaluation of several training businesses based on the evaluation and questions prepared in ii and iii.

6. To develop recommendations on the conditions that facilitate the development and support of training businesses.

The project team was able to carry out numbers 1,2,3, and 5. Numbers 4 and 6 are implicit in the discussion. Because of the complex inter-relationships between the businesses and their socio-political environments, we did not pursue what ultimately would be recommendations that would be too easily dismissed. However in the final section of the report we have raised several tensions. In the documents on the case studies and on evaluation, there is discussion of the practice, which raises many issues and tensions.

Four documents were produced in this project:

1. Case Studies

2. Appropriating Evaluation

3. S’Approprier L’Évaluation: Rapport du projet pilote sur la notion de parcours réussi réalisé en collaboration avec Projets PART (Working Document for projets PART)

4. Appropriating Evaluation at A-WAY Express Couriers (Working Document for A-Way Express)

2. Case Studies

2.1 Methodology:

The first issue we had to face was which organizations or groups we wanted to include in our case studies. Groups would not necessarily call themselves “training” or “alternative” businesses so we had to decide which ones we wanted to describe in this study. We wanted to include a wide range of practice. We prepared the following as guidelines that were broad and flexible; yet, at the same time, narrowed the range enough to be able to get at the mix of characteristics we were after. We came up with the following four criteria.

1. The organizations must be non-profit or cooperatives.

2. They must work with people who have been excluded from participation in the labour market.

3. They must provide real work for people, in other words, participants must be involved in the production of a product or a service that is available to others.

4. There must be some kind of educational or training component present. This can be formal or informal.

The case studies include 42 from Canada- 2 from Newfoundland, 1 from Nova Scotia, 20 from Québec, 10 from Ontario, 1 from Manitoba, 1 from Saskatchewan, 2 from Alberta and 5 from British Columbia. The large number from Quebec reflects our proximity -based in Montreal, and the rapid growth of training businesses in Quebec in recent years. Of the 8 from the United States, 2 are form California, 1 from New Hampshire, 3 from New York, 1 from Ohio, and 1 from Oregon.

The businesses employed or trained a variety of different groups, who face chronic unemployment, or exclusion from the labour market. Most of those involved receive some form of social assistance-welfare etc. The groups include: youth, psychiatric survivors, people with intellectual or physical disabilities, former offenders, women, homeless individuals, recovering addicts, members of First Nation communities. The businesses were in a large variety of sectors including gardening, food processing, building of furniture, metal work, service provision, and recycling.

Our methodology followed several steps. An interview guide/questionnaire was developed. For the organizations in Québec, the questionnaire was sent to the organization, filled out and then when the questionnaire was received, an interview followed to round out details. Because many of the groups were known to the researcher, and she had already written about many of them, this method was used. For the rest of the cases, we were exploring new territory. For those, a preliminary phone call assessed the interest of the group in participating, and then if this was positive, we asked for organizational documents such as descriptions, annual reports. These provided the first information. A phone interview usually with an employee followed and the interview guide was then followed. Finally, after the first draft of the case study was completed, it was sent to the organization to see if it conformed to their practice and orientation. If changes were necessary, they were then incorporated.

In the case studies, we have grouped the information under the following headings:

1. History of the organization: This is self-evident and presents a brief overview of how the organization developed. Of particular importance, is whether the organization began through the initiatives of community organizations, institutions or businesses. These origins often shaped the practice that followed.

2. Type of Work and Labour Market Relations: This dimension of practice includes the type of goods or services produced by the business, and the resulting link to the labour market that training provides. For example, a business can be producing food and preparing employees/trainees for the possibility of work in the food sector.

3. Training: The training occurred at three different levels-job related, personal development and more formal academic. In some of the cases we see all three, all had at least one. The training could take place through a structured program with a prepared curriculum with a didactic or a group model while the unstructured was based on a "learn as you go" or a mentoring approach.

4. Management: This includes both the structure of the organization (cooperative, board of directors), and the more informal processes that could facilitate participation of employees or trainees. The underlying question was whether these organizations facilitated the empowerment of those involved through democratic processes.

5. Community Links and Political Context: Many of the businesses we present grew out of the community milieu or social movements. They continue to maintain links with other organizations either in the local community or with a variety of other groupings. These linkages shape the culture of the organizations in the case studies.

6. Socio-cultural Aspects: For some employees/trainees in the case studies, the organization is more than a workplace, but a place to socialize, create friendships, and build networks of personal and social solidarity. We tried to include this aspect where it was available.

In this report, the case studies will not be presented. They are available in both summary form and in detail in the Case Studies document. A table summarizing the case studies is included in Appendix 1.

2.2 Discussion of Case Studies

In the case studies we have seen diverse practices and approaches to the problem of unemployment and social exclusion. We have selected some issues and debates that grow out of these case studies. We will refer to examples to illustrate these questions. The following are the categories that we used in the case studies. The remarks under each will present the general tendencies and some of the diversities and issues.

There are two axes: economic and political. Each of these has two dimensions. The economic has i) the type of work that the project provides and therefore its links to related segments in the labour market. In other words what type of jobs does the particular project lead to? ii) What type of training is offered formal, informal, personal, professional? On the political axis we describe i) internal democracy and role of participants in decision-making and ii) the relations with the wider community.

History of Organizations and their Context

The vast majority of the organizations were born in the last 10 years, growing out what can be referred to as the "community movement". A few older businesses had their origins in institutions or government departments- HRDA, Mill Lane and New Beginnings. Those in the community sector are characterized by a diversity of funding sources and social partnerships, and are autonomous as organizations. Their development reflects the changing context in the community sector.

The practice that we are discussing has been shaped within changing contexts. This is not to argue that the context determines practice but the growth of these types of organizations is influenced by new ways to address social problems. The following are three basic changes that have shifted the debate on practice in recent years in the community sector. These are all "in process" in the sense that the changes are happening now and the final outcomes, and their interrelations cannot be ascertained at this time. This flux and tension makes the case studies more significant because they are shaped by and help shape the policy context.

The crisis of work and exclusion from the labour market

The consequences of globalization of the economy, technological changes, and restructuring of work, have led to a period in which unemployment can no longer be understood as seasonal or cyclical but related to major shifts in where and how goods are produced. Along with these changes employment in the public sector is shrinking. We see at the same time a downward movement in the skills required for many jobs, a demand for higher qualifications for those jobs and at the same time a polarization between the growing low paid precarious work and the highly paid shrinking market of those in high tech work. The problems faced by those at the bottom are thus enormous. Issues of poverty and long-term unemployment, have affected much of the working class, but for many of the groups who participate in the businesses in the case studies, there is a process which has excluded them from the labour market.

Within the organizations we studied there are two types of groups facing labour market exclusion. The first are those who have always faced severe discrimination in the labour market such as those with mental health problems or physical disabilities. The second are the victims of the changes in the labour market. Faced with these issues the community sector has tried to find new solutions. The practices we describe are examples of many innovative ways to work with these problems. Two major approaches can be described from the cases. The training business(entreprise d'insertion) and alternative businesses. The former emphasizes relatively short-term work experiences with related training while the latter creates new employment opportunities for particular groups.

The redefinition of the welfare state

The welfare state and its programs has changed in the context of economic globalization and a corresponding reorganization of services. The most obvious indication of this process is cutbacks, but the process runs far deeper in the restructuring of several types of relationships. For this study, the most important is the renewed role of community-based organizations in the provision of health and social services. This has not been independent from government but tied to it, usually at the provincial level. Thus, the policy shift has brought a re-definition of the sharing of responsibility for social provision. From the community side, organizations are faced with rising levels of unemployment and poverty, and fewer resources from various government programs, leading them to recast their work and set up new innovative approaches to these problems. The intersection of government and community is complex with pressures from below, and new relations from above. The case studies live in this intersection. State policy for many of the organizations has been in the form of funding at least part of the business, but not necessarily in a stable way. For example, the psychiatric survivor community has experienced support for its business initiatives while witnessing large-scale cutbacks in supported housing. The business oriented practices have received support. They were initiated as innovative forms of practice integrating business development with social solidarity. As they enter into a more formal relationship with government it is hard to predict the practice they will evolve particularly the balance between the business and the social.

Next, the cutbacks of state social and health programs, have left many people without ongoing support and care. In addition, restructuring of social assistance programs, with workfare (the shift from "passive" benefits to "active" benefits) put recipients in a position in which it is often more desirable to be in a program than face the pressures and threats of the welfare bureaucracy. The community sector has taken up the burden of providing acceptable programs in this context, receiving greater support and recognition from various government departments and sacrificing some of their autonomy.

New ideologies of entrepreneurship and training

Related to the changes in the welfare state has been a related shift in the role of the market as a vehicle for solving social problems. An entrepreneurial approach has entered into domains usually defined as either non-profit or non-business oriented. Examples of this are the many programs designed to encourage the unemployed or those on welfare to develop their own jobs through forms of small business development. The growth in contract labour as the only employment option for many has influenced the environment in which employment is understood as individual responsibility. Further, state policy has not promoted job creation, but rather has assumed a "human capital" perspective in which training for work predominates. Community organizations have become subcontractors, providing work readiness programs (employability). The businesses examined in this study are a reflection combining both an entrepreneurial and training components. This approach is limited by the absence of a demand for labour. The businesses create a bridge between those outside of the labour market and possible points of entry to jobs usually in the low-wage sector. Success becomes defined as precarious labour. On the other hand, those businesses which are creating alternative permanent work have used the new social entrepreneurship as a way to define new ways to approach social problems. Finally, the impact of an entrepreneurial culture and Community Economic Development (CED) practice has contributed to greater engagement by the community sector in new forms of business development. The combination of these factors contributes to the emergence of these new initiatives- non-profit businesses which find ways to address the crisis of work.

Products- Economic Activity

The economic activity of these businesses is varied. They are mainly in sectors that require little in the way of capital and technology, and skill from the workers. They are in a sector that is generally characterized by low-wages, and precarious working conditions. The services provided are targeted to the public and private sector. There is a deliberate attempt in some businesses to provide a socially-useful product or service such as furniture for day-cares and social housing (for example, Boulot Vers). The central understanding is that economic activity is a means for personal and social development, and not for profit except as necessity for the survival of the program. The businesses are structured to take into account the needs and the capacities of the employee/trainees. Some of the businesses do use more technology and are capitalized (for example, Formetal, Harlem Textile Works), but the businesses need to be understood as a means of linking the most marginalized with entry points to the workforce. The businesses reflect this perspective; this is both their strength and their weakness.

The role these businesses define for themselves is central in order to understand what can be expected from them in terms of the connections between participants/workers and the labour market. If they are viewed as a transition to work then the level of technology and skill is less important because the experience in the business is a first step to working toward rather than a means of entry into a more stable better paying job. Similarly, if they are understood as an alternative business with the emphasis on social redefinition, then the technology skill issue might be less important. If, on the other hand they are viewed as a means of transition into a job that is relatively well paid, then the technologies and the work in these businesses is inadequate. This is one of the central questions that comes out of the case studies and is defined largely by where the particular experience leads participants, and the type of result that is expected. In a period in which the labour market is so polarized, developing businesses, particularly training businesses in the low wage sector condemns participants to work in that sector. However, if the business is designed as a transition to further education and training then this has to be made a more explicit goal. Training and alternative businesses live in a complex interaction of market, government, and community. Parts of all of these businesses are social insofar as they train those excluded from the labour market or define their *raison d'être* as personal and social redefinition through work. Because these are not traditional businesses in that they are not primarily defined by profitability and private interests, and because they have come out of the social sphere, they have established a complex relationship with the market and funding organizations. Almost all of the businesses or their promoting agencies receive funds from either government or foundations for the development of these businesses. The combination of acting in a market economy and having a social vocation supported by government or other sources creates complex goals , and expectations, as well as tensions between the social and the economic.

Another issue related to economic activity is the way participant/workers are paid. This is a complex question. There is a range of approaches that have been used from salaries paid directly by business revenues to support from the particular social assistance program or a combination of the two. Most of the projects are tied in some way to government programs that support income of the workers/trainees. These are described in each of the case studies. In the training businesses in Quebec, all of the trainees are on some kind of "welfare to work" program. Most of workers in the Alternative Businesses are on long term social assistance and use the work to increase their income. Some of the more traditional businesses pay direct salaries to their workers (see for example-Cooperative Homecare Associates or Edmonton Recycling). We again face the issue of difference. For some of the businesses, the priority is to train. Clearly, with this goal it is difficult to produce enough revenue to both pay trainees and generate a surplus for the support needed to do this. Further, in almost all of the businesses, those hired as worker/trainees are people who have been outside of the labour market. The primary goal of all of them is to find an alternative to this exclusion and as such, the trainee/workers need support and a supportive structure. Further, the revenue generated by the business, often located in a highly competitive sector, with low rates of return on investment, is unable to perform the social function and at the same time pay an actual salary to a trainee. These businesses are primarily a social intervention and therefore it should not be seen as a weakness that those in them receive some form of government support.

Those that have avoided that situation either allow people to stay for an unlimited time (OBAB etc.) or have found a way to exist as independent businesses that have a support structure that generates business(HRDA), or start as businesses and then add the training component(Kitsaki). The relationships between the businesses and their workers/trainees are complex, and the way they are defined -as trainees, or workers shapes the functioning of the organization.(see below-participation). Another related issue is how much support the businesses should receive because they are a different type of business-one whose primary vocation is social, and at times the product itself is a social outcome. This raises the complex interaction of market/state/community that is implicit in these enterprises. Those receiving government money (Alternative Businesses and those affiliated with le Collectif des entreprises d'insertion) have argued that government policy should be to fund and support them at least for the social aspects of their work while the businesses themselves maximize their revenue to support the more business aspects. These two parts are, however, difficult to separate. The underlying issue is one of government social policy-recognizing these businesses because of the absence of effective alternatives for the marginalized populations who participate in them. At the same time, the emerging entrepreneurial culture discussed above gives increased legitimacy to these businesses.

Training

The businesses all integrated some form of training, but there was variation. All of them had training that was necessary for the particular tasks in the business. Beyond that there was a lot of variation. Some have more unstructured processes; for example, some trained their trainee/employees informally often through a mentoring process. (A-Way Express pairs a new courier with an experienced one), while others have structured programs to prepare trainees/employees for their tasks. In addition, many of the businesses provide other forms of training such as personal development, and some offer accredited programs that are useful for subsequent jobs or as a way back into the formal education system. Some of the businesses, especially those with democratic structures, have developed an approach in which employees learn how to participate in the wider businesses, through committees and board participation. These processes are training for democratic participation, and are viewed to be as important as those which are job related. In some respects, participating in work itself is the means of developing a social citizenship, as those without work are treated as socially marginal.

The training reflects a complex debate related to the transformation of work and the qualifications required for work. The training received in most of these businesses does not qualify participants for any particular job, and does not provide any formal certification(like a formal apprenticeship program). Regardless how positive the experience might be for the trainee/workers, for most their promise is dead-ended jobs aftr the training. The practices developed, as we see in the case studies, are innovative and can reach people in ways that more traditional approaches cannot. These programs have to be linked to wider social policies such as income maintenance programs and economic policies that can generate jobs in order to be fully effective. The links to these types of policies and the connections to other government programs need to be more thoroughly explored in order to build an effective practice. The businesses which are short-term training businesses, for the most part are better understood as a period of transition but not necessarily directly into the labour market. These businesses use training to break a cycle of exclusion; that is, they provide a way for those who have been outside of the labour market to begin to find a route into it. The training is as often more about learning to work than it is about the skills in work. The problem for this approach is that there is no structured next step. For other businesses such as those affiliated with OCAB, other dimensions such as leadership development, personal transformation, along with political and social engagement are considered equally important aspects of training.

There is an implicit debate in perspectives here. The underlying question is what are the goals of these businesses. The assumption that training leads to jobs is at best questionable and there is little follow-up from the organizations that documents whether or not they have succeeded at this level. Some have had success particularly with youth in getting them back to school, after their participation in a training business. The job training is more often linked to low-wage and precarious sectors of the economy. The limits of these enterprises are structured by the labour markets themselves. However, the trainee strategy has to be viewed as a form of passage toward the labour market rather than the means to connect into a job. Organizations such as the survivor businesses have defines a parallel labour market as a strategy. Employment in these businesses is not a passage to something else but a redefined status, a position that can be relatively permanent and defined by the capacity of the employee to do the work.

Approaches to Participation

Kathryn Church in her book Forbidden Narratives examines three traditions in mental health. (p.39-42) These are pathology, rehabilitation and self-help. Although most of the case studies do not fit into the general field of mental health these approaches are useful. Under the pathology approach, those receiving services are defined as patients and an illness model predominates. There is a high degree of professionalization of services, with psychiatrists, nurses and social workers having expertise. This approach has produced sheltered workshops in institutions as a means of linking patients to work. The second approach is rehabilitation in which those receiving services are defined as clients and the focus is on correcting some kind of disability. Service is professionalized but not linked to a medical model. There is a social/individual focus with vocational rehabilitation as the means to link individuals to work. In both of these approaches, power rests with professionals. The third approach- self-help- departs in basic ways. Participants in programs are viewed as members, and there is an attempt to break out of a client-worker relationships to one in which members have some power to shape and run their organizations.

The following perspectives emerge from the case studies, and approximate the three approaches. The two that predominate are the second and third.

vocational rehabilitation and sheltered workshops

Establishing programs for those defined by one disability or another has a long tradition. Sheltered workshops in institutions or set up by them and vocational rehabilitation are based on a model that the workers in them cannot compete in the labour market, and therefore need special circumstances and structures in which they can work, often for almost no wages and carrying menial tasks. The work itself is dead-ended in that it is an end in itself rather than training for "better" jobs. Within our case studies, we have found several that grew out of this tradition: Vocational Guidance, and Mill Lane Enterprises. In both cases, autonomous businesses and/or training programs have developed out of these organizations.

service provision in new forms and new professionalism

Most of the cases use an approach which defines the trainee/employee as a client of a new kind of innovative service that links business development, and training as a means of affecting the lives of a group of people. The goal for most of these organizations is the placement of their clients in jobs. The businesses are based on a professional model with a clear delineation of roles and power between client/employee and staff. Trainees are both trainees and workers providing the manpower for the business and receiving a wage which is not necessarily linked to the revenues generated by the business but is derived from a government program. Training is both directly related to the skills needed in the work place and to help with the later placement in the labour market. Les Entreprises d'insertion are examples of this approach.

as workers

This third category is a variation of the one above. In this approach the trainee is treated much more like a short-term worker employed in the business with greater emphasis on the business/employee relationship than the trainee role. Training is more or less limited to that which is necessary to perform the tasks related to work. The underlying assumption is that work itself has a positive impact on individuals and can act to help them find the means to secure other jobs or return to school. It is a way of breaking out of a trajectory of social exclusion. Chic Resto-Pop is an example of this approach.

self-managed and democratic (self-help)

This fourth category puts a great deal of emphasis on the social and personal processes associated with the business. Participation by employees in decision-making either through cooperative structures or through majority representation on boards is an example of this process. These businesses allow employees to remain for longer periods of time than training businesses. The businesses are seen as a means for both personal change and wider social redefinition. Issues of control and autonomy are at the core of these businesses. The OCAB affiliated businesses have been a reaction to the domination of professionals in the lives of psychiatric survivors. The businesses are a means of taking control of their lives, as well as forming a community through the process of business development.

Another variation on this classification is as follows: training businesses with limited-duration training programs; businesses which offer permanent jobs and income with strong democratic functioning; and organizations which offer a long-term place for activity, sometimes remunerated and sometimes not, with little democratic emphasis. The length of time participants are with an organization makes a big difference to the degree to which they are able to participate in the administration and fundamental decision-making. That is not to say that there cannot be strong democratic processes in those businesses with a short-term trainee population but those are more difficult to build into the structure of an organization with a constant and rapid turnover. In fact, of the case studies from outside Quebec, those which have unlimited positions are almost all strongly democratic and alternative -- either coops, or majority employee boards: ABEL, A-Way, Cooperative Home Care, Edmonton Recycling, Fresh Start, Inspirations, Raging Spoon, United We Can, Wyman Way, Young Women Creating Change. There are three which have unlimited positions which would qualify as not strongly democratic: HRDA, Kitsaki Development Corporation, Mill Lane. This reflects a stronger the "business" orientation they are now following. KDC is simply traditional business, as long as band members get employed. Mill Lane is the only institutional one not to have time-limited positions.

An organization with limited training also implies that it is constantly turning out into the labour market individuals with specific skills. Therefore it must be much more in tune with the needs of the labour market on a larger scale, whereas organizations offering permanent employment can focus on their own niche and business development. Another substantial difference between time-limited and unlimited position initiatives is in the training. The unlimited participation initiatives listed above all have unstructured or both structured and unstructured training and most involve participants ultimately becoming the teachers, and a much less hierarchical division. Size and length of time the organization has been around also contribute to a hierarchy and less potent democratic processes.

Links to the Wider Community

There is a wide variety of linkages that these businesses have established with their immediate communities defined both geographically and in terms of the group that participates in their programs. These relationships are at many levels, ranging from structured partnerships with the business community and social agencies to grassroots connections with other groups in the local community that share similar concerns and questions. The two wider collectives that were presented earlier -le collectif des entreprise d'insertion and OCAB are places of affiliation for many of the businesses in our sample. There are some commonalities and some differences in their respective roles. Both act to promote and represent the businesses in public, and encourage and support their development. They are networks of solidarity, a place for representatives of the businesses to meet and discuss problems and issues. The differences lie in their political role. Le collectif has clarified its criteria for membership in its organization and therefore defined the criteria for an entreprise d'insertion. These form the basis for negotiation with the government for recognition and it is hoped that this process will lead to more regularized funding. There is a tension here between the experimental nature and socio-economic innovation of these businesses and formal recognition that will regularize their status and role and move them into a quasi-institutionalized relationship with the government.

OCAB defines itself as part of a wider political and social movement that is about making changes in how psychiatric survivors define themselves, and in government policies that affect their constituencies. This brings OCAB into a contradictory relationship, as they have received support from some government agencies, and have entered into conflict with others. They have mobilized their constituency against particular government policies while seeking further support for business development as a way to extend their approach. Their relation to the state is contradictory, while the mobilization and the empowerment of a broad membership remains a key element. To date OCAB has received support but it has not abandoned its social role nor has it lost its autonomy as an expression of the struggles of the survivor community.

In reviewing the case studies, a variety of community linkages are evident. Very few of the businesses are isolated. The linkages vary. Many have connections to organizations that work with similar population groups. This grows out of a more traditional service orientation in which the business is part of a constellation of services, and share a client population. Linkages with other businesses in the same sector or with the wider business community were also common. These were used as a way to link trainees to jobs, or a means of mobilizing support from that sector. Several have a strong representation from other businesses on their board of directors as an important connection to sources of funding. Other connections with the business were with supplier organizations, and those that bought the goods and services produced. Some of these relations are with single organizations or businesses on an *ad hoc* basis. Others are more formal and the organization has negotiated formal partnership agreements.

Advocacy and political representation, often through coalitions, is a way in which these organizations differ from traditional businesses. There are many examples of this type of practice. California Emergency Foodlink has been involved in a campaign to end child hunger, and Edmonton Recycling has promoted the hiring of people with disabilities. Many organizations are members of various local groups that discuss and promote solutions to issues such as poverty and unemployment. Some have played important leadership roles on socio-economic questions-Chic Resto-Pop in Montreal organized a conference and a lobbying effort on the question of debt, government spending and poverty. Advocacy efforts to promote the approach of the business is common, such as HRDA's work with the

Conference Board of Canada. Advancing the various models is common as the groups for the most part have brought innovations forward and want to see these approaches strengthened. Because the training/alternative businesses were put in place to play a variety of social roles, their involvement in wider issues and in structured relations with many different coalitions on socio-economic questions strengthens the social component, and brings support for their practice from a wider milieu. Without these contacts and engagement, there is a tendency for the training/alternative businesses to become part of a service network with traditional service goals, and little practice that can act to support the empowerment of participants,or promote social change that can benefit them.

2.3 Final Remarks

Training and alternative businesses are a new type of community practice that has grown in recent years. Linked to the community sector, they are examples of new definitions of the relation of that sector to both the state and the business sector. They are at once a business and a program that attains social ends. As a business, they produce products and services that are sold in the market and they have to produce some revenue; the primary goal of these initiatives is social. Business is a tool for social development. For many of those described the business acts as an alternative way to enter the labour market for those who have faced long term unemployment or job discrimination. There are those that use a training approach in which participants work/train on a time limited basis. These businesses see themselves as a bridge to either a job or further training. Other businesses encourage their employees to remain for an indefinite period and in practice have created a parallel labour market. Another difference is in the form of management of the businesses. Some have chosen democratic and/or cooperative forms of management encouraging participation of the workers/trainees. Personal redefinition is associated with this position; in other words, the businesses have a wide social orientation that includes individual and group transformation and a collective empowerment approach.

These businesses are "in process". Most of them have emerged in recent years in the context defined above. They face instability as well as deteriorating economic conditions for many and a redefinition of the welfare state. Most of the businesses are in uncertain relations with both their funders and the market for their goods and services. They are an example of the ways in which the wider community sector is reinventing itself in difficult circumstances. Taking into account the marginalization of their employees/trainees and the push to entrepreneurship, the new businesses have tried to balance the social and economic. This is a difficult task in face of the enormous social problems and lack of social resources. However, this balance is also the source of a creative energy that runs through all of the businesses along with their commitment to a social solidarity, the essence of the spirit of the community movement.

3. Evaluation

The material in this section is drawn from a larger document "Appropriating Evaluation". We begin our point of view on evaluation and a discussion of the way the document was prepared.

3.1 How did we develop the document?

Appropriating Evaluation was written in two stages. Our first draft was preoccupied with a couple of questions. (1) What do the experts have to say about evaluation? Section one addressed this question with a review of academic literature. (2) What do people actively engaged in training/alternative businesses have to say about evaluation? Section two addressed this question with the results of research carried out in Montreal and Toronto. Then, in Section three, we proposed some initial evaluation guidelines for people in the sector. Circulating our draft to a network of readers in both cities generated useful feedback.

In response to this feedback, we made substantial revisions. For the sake of completeness, we retained the literature review in this final draft. Some people found it useful and, for those who didn't, we made it shorter. Readers liked our discussion of practitioner experiences with evaluation. Clear and relevant, it was retained as originally written. We made our most significant changes to section three, reworking our guidelines to create a series of steps that reflect our own attempts to enact evaluation as critical reflection. Beginning with an outline of key elements, it now features summaries of two pilot studies. The first was done with staff and participants of Project PART in Montreal; the second was done with employees of A-Way Express Couriers in Toronto. Our discussion of these pilots is focused on process rather than content.

For practitioners of alternative/training businesses, evaluation is a fairly recent phenomenon. A primary intent of "New Practice, New Directions" was to find out what people had experienced and thought about it. To that end, research was carried out in both Quebec and Toronto. What do people actively engaged in alternative/training businesses have to say about evaluation? What kind of experiences have they had with evaluation, both internal and external? How do they deal with evaluation on a day-to-day basis? And what are the politics involved in evaluation? These are basically the questions asked at both sites. Audio tapes from individual interviews and focus group discussions were transcribed and analyzed for primary themes. Our initial intent was to present only a synthesis of Montreal-Toronto data. However, after we had worked with it for awhile, we realized that the uniqueness of people's experience and their context would be lost if we featured only commonalities. Therefore this section of the paper is comprised of back to back summaries: the first describes what the people say about training businesses in Quebec; the second describes what the people say about alternative businesses in Toronto.

In Montreal and Toronto, practitioners of alternative/training businesses are under significant pressure to *prove* their success. Some of this pressure is self-generated; people want to understand and improve their practice. But much of it comes from outside, from funders and others for whom *success* is defined in terms of tangible or measurable outcomes. These are typically indicated in numbers or percentages: revenues generated, jobs created, participants off welfare, meals served, deliveries made and so on. Regardless of location, practitioners tend to be judged (and judge themselves) on the basis of tangible outcomes: their ability to ease the unemployed into employment, to create jobs for the jobless and to reduce the costs of welfare. Many consent to evaluation on these quantitative terms hoping that *scientific* results will bolster their cause.

At the same time, practitioners are interested in how *intangibles* might complete the picture. *Intangibles* emphasize process. They attempt to describe how a person’s situation has evolved. High quality relationships, new skills and capacities, and a positive impact on the community are all intangible outcomes. Alternative and training businesses often participate in the revitalization of communities by providing jobs and/or any other type of social service such as affordable meals. In the case of psychiatric survivors, community building goes a step further. While creating a sense of membership and group belonging, the businesses challenge assumptions about *mental illness*. Thus, intangibles refer to individual and collective transformations brought about by the economic initiative. Some are actively seeking another approach, one that would attend to the intangibles of these ventures, the day to day processes of human interaction through which individual and collective transformation can occur.

The following are the guidelines for the evaluation of training/alternative businesses. Our recommendations for this process are rooted in reading the evaluation literature, listening to people talk about their experiences, and analyzing the dialogue (or lack thereof) between the two. In the course of this project, we have learned that practitioners are under significant pressure to *prove* their success. Some of this pressure is self-generated; people want to understand and improve their practice. But much of it comes from outside, from funders and others for whom *success* is defined in terms of tangible or measurable outcomes. These are typically indicated in numbers or percentages: revenues generated, jobs created, participants off welfare, meals served, deliveries made and so on.

Practitioners, especially those who run training businesses, believe that results of this type should be part of any evaluation. At the same time, they are interested in how *intangibles* might complete the picture. *Intangibles* emphasize process. They attempt to describe how a person's situation has evolved. High quality relationships, new skills and capacities, and a positive impact on the community are all intangible outcomes. Alternative and training businesses often participate in the revitalization of communities by providing jobs and/or any other type of social service such as affordable meals. In the case of psychiatric survivors, community building goes a step further. While creating a sense of membership and group belonging, the businesses challenge assumptions about *mental illness*. Thus, intangibles refer to individual and collective transformations brought about by the economic initiative.

From our perspective, the debate over tangible and intangible outcomes is best understood as part of a larger debate over evaluation itself. At this level, the people we interviewed articulated two opposing views: trusting and contesting. In the *trusting* view, evaluation is understood as a tool to assess the strong and weak points of an organization. Seeing evaluation as positive, those who share this view tend to minimize the question of control. They believe that the scientific process will guard against bias and ensure objective judgments about their organization. In the *contesting* view, evaluation is understood as a mechanism of control. Those who share this perspective question the idea that an evaluation process can be neutral or objective. They anticipate that the outcome of the evaluation will be increased control by funders. In the literature, we find a similar opposition between evaluation as objective judgment and evaluation as social or state control. In this way there is a parallel between theory and practice.

What separates those who trust evaluation from those who contest it? Implicit in their differences is a basic opposition between conventional/traditional and alternative paradigms of science as we laid them out in the first section of this document. In spite of strong challenges, the conventional paradigm continues to dominate the social sciences. It does so based on several assumptions. First, it is possible for a researcher to be totally detached from what he or she is studying and in no way influence the research process. Secondly, the world operates according to immutable laws, and the role of science is to discover them. Most of these laws are relations of cause and effect. For example, the government cuts social assistance; people go hungry. Of course to determine just how hungry these people get, a large-scale study must be done. What is more, the conclusions will apply to the entire welfare population. That is another characteristic of traditional science: it produces generalizable conclusions. As for methods, the large number of cases requires a quantitative approach. The product of this type of research is usually numbers in every form (graphs, tables etc.).

In the alternative paradigm, there can be no detached observer. The researcher is necessarily part of the reality under study. Thus, a scientific process is by no means objective — it produces one interpretation among many possible others. Within this world view, there are no laws — causal or other — to be discovered, only multiple realities. To understand these different interpretations, qualitative methods that include stories or interviews are the most appropriate. However, studying a small number of cases in depth reduces the scope of generalization. For example, if ten people are interviewed for a study of the impact of welfare cutbacks, the information gathered will be very rich in terms of how each person’s daily life is affected. However, it will be impossible to generalize these experiences to all those who are on welfare. For those who adhere to the alternative paradigm, this is not a problem. Their goal is not to make generalizations but to understand particular realities.

3.2 Overview and Basic Argument

What does the academic literature have to say about evaluation? First, when it comes to history, there is no "official story". For some, the 200 year evolution can be described as different stages; for others, it is succeeding generations. The most important aspect is that the later frameworks acknowledge the ideological and political aspects of evaluation. Evaluation is no longer seen as an objective, scientific assessment, but as a process in which stakeholders have multiple, often conflicting interests. We believe this change is related to a paradigm shift. More and more, the very notion of science is being questioned: its objectivity, its methods and its political inherency. A "critical" paradigm is slowly emerging, thus offering an alternative to the still dominant, empirical model. As for the political aspect of evaluation, a number of authors have stressed the highly political nature of evaluation. More often that not, evaluation is about control and power.

As a project team, we agree that evaluation is not a neutral scientific process but one in which relationships of power are central. Evaluation may be used to maintain the status quo or, on the contrary, to modify a particular situation. The nature and depth of the modifications will depend on the power relations at work within the evaluation committee. The evaluator is a key person in these negotiations. This person need not be an outsider to the group or even a credentialed expert. They must, however, be prepared to make explicit the ways in which stakeholder groups are embedded in relations of power and control. It is through this work that evaluation becomes a vehicle for creating shared knowledge.

Evaluation should be a democratic process, reflecting and amplifying the voices of those who are subject to it. The title of the evaluation document urges community groups to take control of evaluation. The core values and beliefs of the organization should always be evident, shaping the issues, questions and the tools themselves. One of our major goals is *to provide intellectual and analytic tools that will increase the capacity of community organizations to appropriate evaluation*. We want to help them gain more power in the processes that shape their practice. Part of this is attempting to change the balance of power between those who fund and the organizations who receive funding. If groups make more informed choices when entering into the evaluative process about the nature and type of evaluation, then they can better control the outcomes and use these outcomes to contribute to organizational practice that is in keeping with their own values and traditions.

The question of who controls evaluation is linked to knowledge. With more and more organizations dealing with evaluation on a regular basis, there is a need for practitioners to become more familiar with evaluation frameworks and their methods, and to apply these concepts to their own practice. In the past few years, conceptual shifts have taken place enabling academics to take up evaluation outside of the conventional scientific frame. Yet, within the field, positivism continues to reign supreme. As a result, practitioners of training/alternative businesses are seriously constrained in their choice of evaluation methods. They are under tremendous pressure to construct a particular kind of knowledge about their initiatives, one that reproduces the relations of ruling. We acknowledge this reality. At the same time, our goal is to "push the envelope," *to bridge the gap between theory and practice, to build alternatives*.

This document we produced is intended primarily for people who are engaged with marginalized communities in developing alternative/training businesses. As a project group, we see communities as places of social power. Our intent is *to reinforce, extend and mobilize the community movement*. Although we work in different ways, we all locate ourselves within that tradition. We view evaluation as an opportunity for community organizations to critically reflect on their own practice, independent of the demands of funders. It can be a process through which groups come to understand the continuities and changes in their practice, and its impact over time. Community organizations can use evaluation to educate their members, and to develop and sustain their leadership. They can use it to analyze the impact of the context in which their practice occurs: the labour market, employment policies, and funding policies. The implication for funders is that they give community groups the space they need to do self-evaluation. The implication for academics is that they use the scientific tools at their disposal as part of a political project to empower communities.

3.3 Guidelines

Our first attempt to draft a set of guidelines laid out a series of five steps: deciding to evaluate; preparing for evaluation; making choices about focus and method; gathering and analyzing information and establishing mechanisms of ongoing evaluation. The core of it for us was preparation. We recommended that people start by probing the socio/political context and the key actors influencing the life of their initiative. These parts shape the questions and the tools that will be used in the evaluation implementation. Reflecting on these issues before entering into evaluation is a necessary pre-requisite for groups/organizations if they want to appropriate the evaluation process and make it useful to them. Specifically, organizations should examine their own history and traditions, as well as the social and political context. They should then build an analysis of the actors that influence their organization. We recomend using the following questions:

- what are the mission and the goals of the organization?
- what are the political stakes riding on the evaluation?
- how do labour market and employment policies affect your organization and its clientele?
- what are the values and orientations of your organization on the question of business development versus emphasis on wider social development and empowerment?
- why and when were relationships developed/terminated with State and/or funders; clients/members/participants; wider community; university or other research centres; other organizations?

For implementation of the evaluation, we suggest a number of steps that include deciding who will be on the evaluation committee, what will be evaluated, why and how, etc. Of course, in the case of an external evaluation, these choices may be limited. Organizations may or may not have the possibility of negotiating the process and therefore, getting their vision recognized. In either case, the discussions around context and actors will help groups enter the process with a clearer vision of who they are and what how they fit in the wider context.

3.4 Evaluation Process

STEP	ACTION	WHO IS INVOLVED
1. Deciding to	The following questions could/should? be discussed…	Board, staff,

Evaluate	➢ why now? (what was the catalyst?) ➢ who asked for the evaluation? (is the evaluation externally or internally generated?) ➢ what is at stake? are there shared/conflicting interests? ➢ are there external constraints on the evaluation — financial, etc. ➢ what are the objectives, defined from the viewpoint of stakeholders?	participants/ workers
2. Preparing the Evaluation	The following questions could/should be discussed…	
2.1 Contextua-lizing	<u>Social context in which practice occurs</u>: ➢ what is the **mission** and **goals** of the organization? why and how was this mission determined/established? has the mission changed overtime? why and when? is there a gap between theory and practice? ➢ what are the **political stakes** what are the long and short term interests of your organization? of your funders? what type of relations do you have with the State? ➢ how do **labour market and employment policies** affect your organization and its clientele? what is the social and economical situation of those entering the organization? what are the possibilities of finding employment for workers/participants leaving the organization? ➢ what are the **values and orientations** of your organization on such questions as… the dominant ideology vs. other beliefs that might be in the organization emphasis on business development vs. emphasis on wider social development and empowerment beliefs about the ideal outcomes of practice	Board, staff, participants/ workers
	<u>Actors: mapping alliances over time</u> ➢ why and when were relationships developed/terminated with… other organizations State and/or funders clients/members/participants wider community university or other research centers	

Evaluation Process (cont'd)

STEP	ACTION	WHO IS INVOLVED
2.2 Making choices	➢ Who will be part of the evaluation committee? • staff? • workers/participants? • board reps? • partners? • members of community? • funders?	Board, staff, participants/ workers
	➢ Who will carry out the evaluation • selecting the right candidate • contracting: how to make it clear (expectations, methodology, parameters, how wide, how deep)	working group from evaluation committee
	➢ What is the focus of the evaluation? (see Table 6, following page)	evaluation committee
	➢ What part(s) of the program should be evaluated? • why? (go back to stakes and interests)	evaluation committee
	➢ What type of methodology do you want to use? • quantitative • qualitative • a combination of both	evaluation committee
3. Gathering and analyzing information	➢ Discussion: sharing the results — when and with whom? ➢ Collecting the data • identifying sources of information • defining who does what ➢ Analyzing the data	evaluation committee and evaluator
4. Working with the Results	Internal (organizational learning and knowledge building): ➢ Discussion: • defining or redefining mission and goals • devising strategies/tools for making changes External: ➢ Discussion: • defining or redefining relation to Funding Agencies • defining or redefining relation to Wider Community – Alliances (this might be used to mobilize support)	Board – staff, community
5. Establishing Mechanisms for Ongoing	➢ training staff for evaluation ➢ putting in place tools ➢ organizing documentation, files	Board - staff

for Ongoing Evaluation	➢ planning regular reflective discussion	

<u>3.5 Evaluation Content: Some suggestions</u>

In this section, we provide a list of quantitative and qualitative indicators for the evaluation of alternative and training businesses. We have divided the indicators into 5 categories. The first four are those used in the case studies: *business, training, internal relations* (democracy) and *external relations* (community links). To these, we have added a fifth category in which process is central: *impact*. All the indicators presented below are taken from discussions with practitioners, workers/participants and funders. The list is not meant to be comprehensive, but to provide examples of what could be evaluated. Organizations may use it as a guide to identify new indicators tailored to their particular needs.

<u>*3.5.1 Business*</u>

<u>Quantitative indicators</u>

number of meals served, of deliveries made, of documents printed, etc.
new products or services introduced
consumers of services or products (who they are: new clients? new sector? satisfied?)
annual budget
level of financial sustainability
financial contributions: donations (money or produce, etc.)
number of employees (and/or participants)
growth

<u>Qualitative indicators:</u>

dealing with crisis (how, when, who was involved)
finding innovative solutions (how, when, who was involved)
doing good business while respecting community values (ecological, etc…)
health and safety in the workplace (regulations, implementation, etc.)

3.5.2 Training/work

Quantitative indicators:

number and profile of participants (E.I.)

who were selected

who completed the program

who have found jobs or gone back to school

number and profile of workers (alternative businesses)

who were selected

length of time working at the business

technical training

time spent in theoretical/practical training

at the organization

in other training sites

in informal workplace training

trainer/participant ratio

level of satisfaction (may also be a qualitative indicator depending on method chosen)

personal growth and development

time spent in individual/group therapy

level of satisfaction (may also be a qualitative indicator depending on method chosen)

follow-up

frequency and type of contacts with ex-participants/workers

Qualitative indicators

way new participants are integrated

how (individual, small or large groups)

activities to facilitate integration, bonding

use of peer training, etc.

office culture

resolving tension between individual needs and organizational demands

from the participants/workers' point of view from staff/management's point of view

level of satisfaction/dissatisfaction

strong points

weak points

suggestions for change

3.5.3 Community Links

Quantitative indicators:

number of participants referred to other service providers

number of potential employers and frequency of contacts made with them

number of members

number of contacts with other community organizations

Qualitative indicators

partnerships:

with other service providers

with potential employers

with the community (support through purchase of goods and services, organization rooted in the community)

with participants (building together, creating a sense of belonging)

certain continuity:

with staff, volunteers (who understand and transmit the organization's traditions)

spin-offs or new projects

3.5.4 Internal democracy

Qualitative indicators

participation of employees/participants/members in the management of the organization

in day to day activities

in strategic planning and decisions concerning orientations, priorities and goals of the organization

education/consciousness-raising through seminars on the causes of poverty and exclusion

3.5.5 Impact/process

Qualitative indicators

on participants:

- on a personal level
  - impact on self esteem, self-confidence, self-expression
  - personal growth, learning,
  - impact on the way they see their future; empowerment
- on their living conditions
- on their "employability"
  - acquisition of technical and social skills to face the job market
  - training and experience on job

on a particular community

- development of (women's or survivor's) identity
- changes in the way the community (survivor, homeless, other) is perceived

on the public/community at large

- response to a particular need (ex.: feeding the hungry)
- revitalization of the community

4. Pilot Projects

Three pilot projects were carried out, one in Montreal and two in Toronto. This report presents two of them. The third was undertaken later. It includes a description of the processes and the issues that came out of the evaluation for two of the groups. We also raise some questions about the process of evaluation that we undertook. The evaluation was undertaken voluntarily and the process was used by the groups to reflect on aspects of their practice. At all times, the organization was in control of the process. Final reports were presented each organization and this was followed by a discussion. In both cases the results were positive. Issues and concerns were discussed and changes in aspects of practice will likely occur. Our two main goals were achieved; that is, the evaluation process provided an opportunity for critical reflection for the organizations, and it was democratically controlled by the organization. Voluntary evaluation-that which is not linked to the funding of the organization- can be a tool of reflection, and a means of organizational change. The summaries below were prepared by the two members of the project team who were responsible for carrying this aspect of the project in Montreal and Toronto.

4.1 Projets PART (prepared by Élaine Lachance)

Projets PART was developed in 1987 by Communauté et Santé Mentale inc. (COSAM). This innovative program had two objectives: 1) to provide theoretical and practical training to help people who had experienced mental health problems reintegrate the job market and 2) to change the vision of mental health by putting forth this capacity and desire to work. Since then, the organization has been steadily growing. During the first three years, a training program in cleaning was offered. People in the community with limited mobility could place a request through the CLSC and PART, located in the same building, would arrange for participants to carry out the task. In 1990, a second program was added: cuisine d'établissement. Again, the program was created with the needs of the community in mind: food prepared by the trainees would provide low cost meals for those who had difficulty getting to grocery stores and cooking for themselves. In 1993, Projets PART moved to a new location where it had room to expand its production. A catering service was introduced, and PART began making meals for primary schools in the neighborhood and Meals on Wheels.

In 1997, with its activities becoming more and more diverse, Projets PART decided to make the training business a separate entity. PART du Chef was incorporated that year, and soon after recognized as an E.I. and member of the Collectif. In March 1998, PART opened its first business: the Café du Refectoire, located in the building which houses the Régie régionale. Out of the 7 positions created, 5 are held by ex-participants; for PART, providing such employment opportunities is a major accomplishment. With the list of products and clients growing every year, PART fulfils its mandate as an E.I.: to offer its participants a real job experience, while providing them with the training and support they need to find a job once their program is over.

Process

Get connected

The process of selecting a candidate for the pilot was longer and more difficult than we expected. Since we were working with an “ old ” organisation in Toronto, we thought it would be interesting to select a “ young ” organisation for the Montreal site. SOS vélo, an EI providing training in bicycle recycling, seemed like a promising candidate. Unfortunately, this organisation was fresh out of a 6 month evaluation process initiated by the Collectif des entreprises d’insertion. While discussing which other organisation would be suitable for the pilot, we realized that contrasting two organisations at very different moments in their evolution would perhaps make comparisons difficult. Having decided to work with an “ older ” organisation, we contacted La Relance, established since the beginning of the 80’s. Our only fear was that this “ successful ” E.I. would hesitate to participate in yet another research project. As suspected, La Relance declined our offer. We then set our sights on Projets PART, a community organisation working with people with mental illness since 1987 and recently officially recognized as an E.I. After having read *Appropriating evaluation*, PART’s director, Marthe Bureau called to say they were interested, but wanted to know precisely what we had in mind. This was discussed at a first informal meeting in November. Four people were present: Jean-Marc Fontan, Marthe Bureau and Nelson Vachon, the training co-ordinator at PART and myself.

During the first part of the meeting, Marthe Bureau gave us feedback on our evaluation document. She had found that many of the issues discussed in “ What people said ” applied to her own organisation. As for the proposed evaluation process, the opportunity to reflect on practice as well as a specific evaluation object appealed to her. However, she did not want to embark on a lengthy process that would last more than 6 months. With time constraints also a preoccupation for the research team, we decided that the evaluation should be completed by the end of February. Jean-Marc Fontan then provided examples of different evaluation objects, linking these with what Marthe and Nelson told him about their organisation. Before giving us an “ official ” answer, Marthe wanted to share this information with the other members of the team. A week later, she officially accepted our offer. The Montreal pilot could finally begin.

Create a group

In Montreal, this step was wholly taken care of by PART’s director. Without any intervention on our part, she put together a group representative of the whole team at PART. The ad hoc committee was made up of: the training co-ordinator, a chef, an *intervenant psychosocial*, a participant (also member of the board), the receptionist and herself, of course. This pleasant surprise was, in our view, was an indication of the democratic processes present within the organisation. At a later meeting, we addressed the question of adding people to committee, perhaps board members or any other knowledgeable person. Having decided that this was not essential, the ad hoc committee officially became the evaluation committee.

Design a process: Methods

Once PART had decided what they wanted to evaluate, the next question was how this should be done. The committee agreed there were two basic sources of information: participants and personnel. Based on experiences with other E.I.s, Élaine suggested using focus groups to collect the participants' point of view. Since their perception of the experience at PART changes over time, there would be four groups: in the first, participants would be half way through their training; in the second, they would be completing the program; the third and fourth groups would be made up of ex-participants – those who had "reintegrated" the job market and those who were still looking for jobs. At PART's suggestion, it was decided that I would contact the participants from a list of possible candidates provided by the *intervenant* in charge of follow-up. The members of the committee then drew up the list of the employees that should be interviewed individually. Again, special care was taken so that all perspectives (training, production, "*intervention*", management) would be included.

Collect information: Find things out

The discussion on context, actors and philosophy of intervention was held a week later. Thinking that it would be difficult for the evaluation committee to define their philosophy right from the start, I had thought up some questions to "warm the crowd":

> *Why did you want to work at PART? What attracted you to the organisation?*
>
> *Was it because it was a community organisation?*
>
> *Was it because you'd be working with people who have a experience mental illness?*
>
> *What makes PART different from the other organisations/E.I.s?*

What is the main strong point of PART?

How would you qualify relations between...

... staff members?

... staff and participants

... PART and the community

... PART and other community organizations?

We then moved on to PART's mission statement: "PART aims at the social and professional reintegration of persons with mental health problems." The purpose of the following questions was to incite a reflection on practice :

What does this mean to you? Does this mean jobs? What kind of jobs?

What about the social aspect of reintegration? What does this mean?

If people must be "reintegrated", it means that they have somehow been excluded - how do you feel about this? Does PART have a social role?

Do you see PART as a service provider or an agent of social change?

Producing frozen meal for people with limited mobility is not written in the mission - why?

The discussion then moved to questions on the economical and social context: how it affected their participants and their " results " as an E.I. From there, relationship with funders were addressed.

It is now difficult for you participants of the cleaning program to find jobs since this sector has become much more competitive. How will you react?

Are you aware of the unemployment rates in the sectors of food and catering, of for specific groups such as youth or women? Do you use these numbers to contextualize your own "placement rate"?

How has the welfare reform affected the people you work with?

For a long time, participants at PART had to be welfare recipients. Does this bother you ?

> *Though PART has "noble" objectives (training people, helping them get back into the job market), the government mainly funds PART to reduce the number of people on welfare. How do you feel about this ?*

All in all, the discussion lasted an hour and half. Detailed notes were used for the analysis.

The actual data collection took place in December and January. Seventeen people participated in the focus groups, and seven more were interviewed individually. Transcripts were made of the 4 focus groups. As for the interviews, I had planned to work from summaries prepared by an experienced researcher ; however, I soon realized that this was not an easy task for an "outsider", and decided to return to transcripts.

<u>Analyse the information: Make some sense of it</u>

Analyzing the focus groups was the first step. I looked at each separately (thematic analysis) and then compared them amongst themselves (cross-analysis). The same method was used for the seven individual interviews. Bringing it all together was quite a challenge. My main preoccupation was to give the richest account of what the interviews and focus groups had yielded. I decided that this would best be done presenting one point of view (participants), then the other (employees). Though this piece gave a good sense of the issues, I felt it wasn't sufficient. First, I was worried that not everyone at PART would have time to read this lengthy account. Secondly, I wanted to push the analysis a step further, to contrast both points of view and to tie these issues to points that had been raised in the discussion on context and actors. This would bringing the process full circle and contribute to the reflection on evaluation and practice.

For me, it was also important to present these issues without making recommendations. This would place us in the position of experts, putting PART on the receiving end of our "knowledge". The interviews had shown that they had a good sense the problems they faced with evaluation and even ideas for solutions. I thought it was important to bring out these strengths, to show them that they were in control. This is not to say that there aren't very difficult decisions to be made. For example, to which extent do they want to " confront " their funders with their own definition of the *parcours réussi (pathway for success)?* Do they want this definition to be based on **both** components of their mission, i.e. professional **and** social integration? Coming to terms with such questions is what appropriating evaluation is all about.

Work with the results: follow through

A month after the report was presented to the organisation, we met the evaluation committee at PART. My main worry was that they expected the process to go a little further, with us actually providing tools (indicators) to measure the *parcours réussi*. Judging from the positive feedback, it appears that PART is satisfied with the pilot results. The interviews and focus groups have provided a clear picture of the various points of view within their organisation. In some cases, the pilot simply confirmed their intuitions; in others, it pointed towards areas of concern.

One of the major “surprises” of the pilot was to discover that participants don’t have a strong sense of what PART can offer them and what they’re gaining (or have gained) from their experience. They enjoy working at PART and learning new skills, but they have difficulty putting this into words. In our view, this could be linked to the fact that participants do not participate in their evaluation and do not have a final evaluation. The team at PART had already started to identify potential solutions to this problem when we met them. Changes included adding a self-evaluation component to the actual evaluation process to provide participants with an opportunity to reflect on what they had learned both on a technical and personal level. Other problems are linked to the very trademark of E.I.s: combining production and training. Finding an equilibrium between the two is a major issue, one which PART will definitely have to tackle in the near future. As for the notion of *parcours réussi*, discussions within the organisation seemed to be well underway. All ready, they had identified new “ components ” through which they could describe and make explicit a clear definition of success for their participants. The tensions around getting funders to recognise a particular definition of the *parcours réussi* were still present, but they were acknowledge and discussed openly by members of the committee.

Issues and debates

In Montreal, we had planned on having a written "contract" with the organization chosen for the pilot. However, the whole process with PART went so smoothly that we never felt the need to actually go through with this. Having provided a formal proposal of the four possible evaluation processes also gave us the impression the agreement was taken care of. As for the issues of "ownership", they were raised at the final meeting, when we met PART to discuss the pilot report.

The second thing we didn't do was to begin with the discussion on context and actors. Once PART had accepted to participate in the pilot, it seemed only natural to proceed with the next step: deciding what issues or difficulties the pilot would address. A date was set for the first "formal" meeting with PART's evaluation committee. While I was preparing the agenda for this meeting, I realized that we were heading into discussions around what should be evaluated without having previously discussed PART's history or the actual social and political context. After discussing this with the other team members, we decided that it would be best to go on and to schedule the discussion at a later date. PART provided us the perfect opportunity to do so. As mentioned previously, a member of the evaluation committee had raised the possibility of using the pilot to look at PART's history and its particular "philosophy of intervention". In our formal proposition, we suggested that this issue be raised in a larger discussion on context and actors; PART accepted the compromise.

4.2 A-WAY Express Couriers (prepared by Kathryn Church)

A-Way Express Couriers is a non-profit courier business serving Metropolitan Toronto that is run and fully staffed by people who have experienced the psychiatric system. In 1984, the final report of the Toronto Mayor's Task Force on Discharged Psychiatric Patience concluded that, "the challenge is to develop a range of training and employment opportunities within a flexible structure ... one priority for such a model would be an emphasis on supportive, flexible, part-time work opportunities" . In 1985, consumers from two agencies that provide support services to former psychiatric patients initiated discussions with their staff on developing opportunities for innovative work opportunities for consumers/survivors of the mental health system. Consumers/survivors themselves formed a discussion group in early 1986 to explore opportunities to create a supportive workplace for themselves. This group felt very strongly t hat they no longer wanted make-work projects or handouts. Instead, they wanted an empowering workplace in w hich the employees could be supported in becoming more independent. They met weekly for the next year to develop this innovative concept. A feasibility study was prepared and funds were raised to implement the plan. In

1987, the Ontario Ministry of Health funded the program in order to provide training for survivors as well as entry into employment. A-Way opened its doors on June 1st, 1987.

A-Way Express is in direct competition with many other courier companies, but its unique system sets it apart. Couriers are in constant radio contact with dispatch and when a call comes in, the courier hops on the public transit system to pick up the item and make the delivery. No bicycles or cars are used, so the work is accessible to individuals who do not have or cannot get a driver's license. The arrangement is also more environmentally friendly than automobile based couriers. From a business perspective, however, A-Way fills a very particular niche. Bike couriers primarily serve the downtown core, and do not do cross-town deliveries, while automobile couriers have much higher vehicle maintenance costs, and often get snagged in traffic, unable to compete with the speed of the half-hour subway ride across Toronto.

Process

<u>Get connected</u>

My connections with A-Way Express were established several years prior to the work of the evaluation project. Employees of the business were involved in a study that I directed on community economic development as practiced by groups in Toronto's downtown core. When the study was over I became a customer, and kept in touch with the business through my evolving work with the Ontario Council of Alternative Businesses (OCAB). I met executive director, Laurie Hall, in her capacity as an OCAB board member. We have since worked on several joint projects. When Eric Shragge contacted me about the evaluation project, it was only natural that I would in turn involve A-Way Express. Along with Diana Capponi, Laurie agreed to sit on the project advisory committee; she has attended the meetings, read and commented on the evolving documents. In other words, historical linkages and ongoing relationships plus Laurie's desire to appropriate evaluation for A-Way Express, made the business and the project accessible to each other. When the time came to proceed with the alternative business "pilot," I simply phoned her and said "How should we begin?"

Create a reference group

Laurie and I agreed that we needed a reference group for the evaluation; our earliest conversations were about its composition. Laurie's concerns were for representation from both board and staff, including couriers. Knowing everyone well, she approached people she thought would be interested. The reference group for the A-Way pilot met three times. Membership varied slightly from meeting to meeting but the core group included two board members (a lawyer and a social research consultant, both non-survivors), two full-time staff members (book-keeper and officer manager, both survivors), Laurie and myself. We had a bit of trouble securing a courier rep. The person Laurie approached did not agree to participate until after the first meeting and then was absent for the other two. When Laurie and I discussed this, she identified the rather abstract nature of the exercise as a possible barrier (courier volunteers for the business committee are plentiful), as well as the fact that the meetings were held in the evenings. After a long day's work, most employees feel more like resting than doing unpaid thinking.

Get focused: Decide on a question

The reference group's first task was to decide what the evaluation should investigate. Given that the business was free in this instance to ask itself anything it wanted, what should the question be? Lots of suggestions were made until someone finally said: "We need more input from the members." So, we made plans to poll A-Way employees at the Annual General Meeting which was held on October 27, 1998. I had a small spot on the agenda during which I introduced the evaluation project and what we wanted to accomplish with the pilot. Laurie then drew everyone's attention to a short questionnaire that asked people to list five things they would like to see evaluated about the business. When the questionnaires were complete, the person collecting them gave each respondent a ticket, and put the corresponding stub into a box. At the end of the evening, one stub was drawn and one lucky employee won a clock radio! In this way, we collected 30 complete questionnaires and generated 150 questions.

The reference group spent its second meeting discussing the thematic groupings that I made of responses to our questionnaire. In addition to familiar concerns about money/finances and internal relations (how people were getting along and being treated) questions were raised by the membership about education and training, and about various kinds of expansion. Thinking this through, the reference group kept coming back to a scenario in which A-Way represents a "gateway' for psychiatric survivors to opportunities both within and beyond the business. Survivors are looking for a site within which to stabilize and transform their lives. Anecdotally, we know that the business is successful in this task but there are also problems. We talked about the "glass ceiling" that many employees eventually hit: employees who have skills that were built up inside the business but who cannot or do not move on. Mainstream jobs are difficult to come by; it is difficult to make the emotional leap to them from inside a warm, flexible, familiar environment; there is persistent stigma against people with mental health problems.

In response, A-Way has done the only thing that it could: diversify within its own operation so that people can move up to some degree within the company itself. But diversification brings its own problems. The one that we talked about most was the formation of groups and hierarchies within the business. Three groups were identified: couriers on commission; office staff on part-time salaries; management on full-time salaries. Our probe for questions from the membership picked up some tensions between these groups on the dimension of fairness/ equality of treatment. By the end of our discussion we decided to focus primarily on how A-Way does or does not expand opportunities for psychiatric survivors. What do survivors hope and expect of the business coming in and what do they actually experience? Does A-Way generate “mobility” for its employees? If so, how and to where? This is the subject about which the reference group, informed by the general membership, decided to know more.

Design a process: Methods

The reference group had very little difficulty deciding how to collect information. There were a couple of factors here: staff members sitting around the table had a very good idea of what would and wouldn’t work with A-Way employees, and one of the board representatives had extensive experience in social science methods that combined with my own sense of how we might proceed. Together, we decided to use a combination of quantitative and qualitative methods. The steps were:

> develop and circulate a questionnaire to all A-Way members/employees that would gather basic information about their hopes, expectations and actual experience in attempting to settle in, move up inside and/or move on out of the business.

> complete fifteen face to face interviews on the same topic with five individuals from each of three categories (courier, part-time office, full time office)

> organize a discussion among members about A-Way’s history, the key actors (individuals and organizations) who developed and help sustain the business, and the context in which the business operates.

Collect information: Find things out

Laurie suggested that the best way to circulate the general questionnaire would be in employee pay envelopes. She and her staff did this, sending out sixty copies. Employees were paid five dollars to complete and return them. Over a period of several weeks, we collected forty (67%). The fifteen respondents for in-depth intervews were selected in three different ways. Besides Laurie, A-Way has only five full-time staff so everyone from that group was included. I did not interview Laurie but only because I already had her story on paper as a result of recent interviews. In terms of part-time office staff, Laurie selected five, taking gender into consideration and getting a balance of people who have been at A-Way for a long time versus people who have not. Laurie also numbered all of the courier names and drew five at random.

The reference group wanted to use the interview process as a training opportunity. Our initial plan was to hire three employees, each of whom would take notes in five interviews that I would conduct. I was willing but my Montreal colleagues questioned whether respondents would speak freely in front of fellow workers. Laurie agreed that this was a significant problem. I suggested an alternative plan: hiring a woman named Linda Sukloff, a former employee of Fresh Start Cleaning who has an interest in writing and research. In the end, I did the interviews while Linda took notes which she typed up for me afterwards. She was paid through the project budget, as were all employees who participated. Interviews took place over three weeks early in 1999; they lasted from 20 to 45 minutes each. The schedule was set up by marketing manager, Pat Hughes, who was the point of initial contact between me and my respondents. Interviews were held at the A-Way office, a comfortable and safe environment for employees. For the most part, we worked at a long table at the back of the office, close to a large window and a set of lockers. It wasn't completely private (no closed doors) but we were largely undisturbed.

After the interviews were complete Laurie set up a meeting of all employees for the purpose of discussing A-Way's history. This was at my request but coincided nicely with the striking of a history sub-committee within the business. Interest is high in the production of a book that would document and illustrate A-Way's 12 years of operation. We had a good turn-out, roughly 30 people, who came if not to talk at least to take part in the comaraderie and the hot dinner. An added complexity was the presence of a film crew working with OCAB on a documentary about survivor businesses. Their sound and camera men were on the scene throughout the meeting. Along with George, a long time employee, Laurie had pulled out a range of objects that she hoped would evoke memories: an original courier bag, the original filing system, and a bunch of photos of employees past and present. I came primed to probe for relationships of power, to see whether people could make the political dimensions of the work explicit including how they are affected by employment and funding policies.

Analyze the information: Make some sense of it

Reference group members designed the evaluation process but I worked alone with the data. Thus, the participatory part of this exercise did not extend to analysis. The questionnaire was straight-forward, a matter of counting the responses and doing the percentages. The interview material was more difficult. Working with it was a slow process of continually reading through the notes, grouping together phrases that expressed similar ideas or sentiments. In this way I created key categories that I felt captured the core of what had been said. My other concern was to tease out any differences that existed along these dimensions between my respondents with respect to their location.

I met with the reference group at the point where I had a complete but still rough sense of the data. The meeting coincided with a visit from Eric Shragge so my presentation also contributed to discussions going on in Montreal. I found it helpful to talk about the results at this stage - prior to writing. The discussion focused the emerging picture as well as adding new layers of information. Specifically, the summary that I presented indicated that most employees are satisfied with their jobs at A-Way and have no intention of working anywhere else. While this was good news for the reference group, one member pointed out that life in the business has not always been wonderful. There have been periods of crisis, some more intense than others, in which interpersonal relations were very strained. The final days of the previous executive director are remembered as a time in which employees silently signaled each other to meet at a local coffee shop in order to speak freely and safely about what was going on. Discussion about the crises of A-Way's evolution happened more freely in the reference group discussion than it did in the interviews.

Most social scientists analyze their data, then write it up. I tend to merge these two processes. For me, writing is (also) a way of thinking. Thus, as I wrote about people's responses to both the questionnaire and the interviews I came into a better understanding of the data. I merged a couple of categories that had previously seemed separate, and named all of the categories in terms that clarified their meaning. As I wrote I reorganized the text to strengthen the line of my argument. Accessible language is really important to psychiatric survivors. As always, I tried to write so that anyone in the business could read the document. I favor an open narrative style that incorporates particular examples and quotes within a framework of broad themes.

Work with the results: follow through

A-Way employees expressed strong attachment to their jobs and deep ambivalence about mainstream employment. In general, they look to A-Way for new opportunities, work and otherwise, staying put both because of opportunities and constraints. For its employees, A-Way is a place of comfort where they can be themselves among like-minded others. It is a place of learning that engenders in people a sense of future. Constraints on mobility include “mental health problems” made more complex by the tricky support/punishment dynamic of disability benefits. The other major barrier is public intolerance and lack of reasonable accommodation in the mainstream labour market.

In my rough summary to the reference group, I pointed out that most employees are quite hesitant about expansion. They toy with the idea and feel pressured about it but, in fact, most are not keen to unsettle the present operation. This point had an immediate impact on the reference group. Laurie in particular felt a sense of relief. It was helpful for her to receive objective confirmation of something she had previously only sensed. A tentative plan for working further with A-Way’s evaluation is just beginning to emerge. The final report will be presented to the board of directors in late May. Their response to my recommendations will generate an agenda of next steps. Laurie and I have discussed putting the report on the agenda for OCAB’s board as well, to generate some sense of its implications (process and content) for other survivor businesses. We will also want to discuss strategic distribution to government and other organizational “players.”

Some linkages have already been formed. I have been asked to sit on A-Way’s history sub-committee and will continue to explore with that group the question of how best to both elicit and construct historical awareness among employees. What we have learned and will discover at A-Way can feed into another fledgling project: OCAB’s development of a mobile exhibit on the history of the psychiatric survivor movement in Ontario. There are implications as well for OCAB’s In Your Face Learning Academy. A link should be made between A-Way’s core leaders and the formation of the Academy’s curriculum for leadership development. Each should nourish the other.

Issues and Debates

There were strong advantages to the fact that I was familiar with and to A-Way Express prior to the evaluation. Relationships of trust were already in place; accessibility was not an issue. The disadvantage from my perspective was a loss of “beginner’s mind,” the freshness of perceiving and coming to know a setting and its people for the first time. The themes which emerged, by and large, were not new to me reflecting so strongly what I first perceived in 1993. New layers and directions. I was pleased to engage with A-Way especially during a moment of such strength but I wondered whether they would have gained more (whether the questions would have been sharper) if a "stranger" had done the work.

The evaluation project team had agreed that negotiations with the pilot sites should be formalized at some point in writing. A letter of intent could outline what we needed and what we would provide. It would identify places for feedback and change as well as address issues of "ownership" over written products. This is a good idea but I didn't do it. The main reason is because I was pressed for time, as were members of the reference group. I felt fortunate that we managed the three meetings we did; I didn't want to make the process any more demanding than it already was. Instead, I relied on the informal working relationships that I had already established to carry me through. I resisted formalizing them, preferring the verbal commitment that Laurie made to the process. Under other circumstances, if the site and the people were new to me, I would certainly do a letter. As it was, I gave feedback to the reference group after the AGM and as soon as I had a rough analysis of all the data. These were both sensible and possible points of contact.

The three weeks in which we did the interviews was an intense period. I was attempting to keep up with other contracts as well as the evaluation but the core of the problem is that doing a process-sensitive evaluation is time-consuming. Working with a "trainee" notetaker was a positive experience but added to the complexity. It reduced some of my labour and gave Linda experience under low-pressure conditions. However, I kept my own back-up notes, referencing points that I considered particularly salient. In the end, I worked with both sets of observations for the analysis. As usual, I worried about eliciting as much as I could from people without being intrusive. When I interview psychiatric survivors, I am always conscious of how similar I must sound to workers they have encountered: echos of service system surveillance. Also, I know that A-Way employees find it difficult to speak to stranger outsiders. Given those constraints, I thought most were very forthcoming.

The evaluation project team clearly identified the importance of beginning with a discussion of the initiative's history, the context in which it operates and the key actors who help or hinder its development. I didn't start there. Indeed, I almost forgot this step completely - would have without discussion with Elaine about the steps that she was taking in Montreal. Part of the reason is that I already had a powerful sense of these dimensions as a result of previous work. The other difficulty was that I felt torn between the directions given by my colleagues and those given by my reference group. I couldn't figure out how to be decisive and organic at the same time. I ended up doing the history part last. In the meantime, I learned that it isn't necessary to gather this information sequentially or rigidly. It doesn't matter how you find out as long as you acquire a strong sense of these elements before the project is over.

The strategies that Laurie and I employed to elicit employees' sense of history didn't work very well. The photos were too far away for most people to see and I was too intimidated by the abstract nature of my own questions to even pose them properly. For about an hour we were stuck at the level of good-natured story-telling, some of which we deliberately asked for, and a lot of laughter. That's not a bad place to be but it didn't fulfill the purpose. My strongest sense of the event is that it worked best for the film crew; they got some great footage. In our post-meeting debrief, Laurie and I agreed that the group was too big and that it was split between long term members who could talk about the good old days, and newer members whose sense of the business is very much in the present moment. We needed to tap separately into the different knowledges of these groups. Regardless, it is difficult to provide people with a space in which they can struggle with the question of how their history interacts with the lives they live right now. At some point, it becomes the evaluator's role to connect lived experience to the broader context. This is the hardest part of evaluation as critical reflection; it is where I struggled the most.

Conclusion

Both pilots provided an excellent opportunity to experiment the evaluation process our team had designed. As in most cases when theory is put into practice, there are some surprises along the way. Realizing that we had begun talking about what to evaluate without having previously discussed actors and context was one of them. Reflecting on this, we have tried to identify what could have induced this oversight in both pilots. With A-Way, the fact that the researcher had extensive knowledge of the organization probably made addressing such questions less imperative. But perhaps it is simply this is an unusual starting point, to say the least. History, key actors and context are issues that are rarely addressed all at once. And though they provide a better understanding of what the initiative is about and where it's going, raising these questions in the context of an evaluation is not an obvious step. Seeing that each group appropriated evaluation in its own way, we come to the conclusion that what is most important is to raise these consciousness issues with the group somewhere along the way.

The other thing we have realized is that the steps suggested can serve as a guide — no more. Often, playing it by ear will ensure that the evaluation run smoothly. For example, in both sites, we chose not to "tamper" with the relationships established with the groups by introducing a written agreement. We still believe that such a contract may be useful, but the evaluator should decide whether to press the matter. Appropriating evaluation is also about making decisions along the way to ensure that the process is beneficial to all involve

The advisory group for New Directions, New Practice met for the first time two years ago at the summer program of the Institute for Management and Community Development in Montreal. When the meeting ended, one of the Montreal members left feeling criticized for not questioning the role of professionals in the development of entreprises d'insertion. She in turn was critical of the leaders involved with alternative businesses for being anti-professional. Immediately, we were confronted with what became a central dynamic of our work: significant differences between sites in Toronto and Montreal.

Toronto and Montreal are different in terms of geography, history and culture. Even though they are subject to the same global forces, we heard different things from people in the two cities about what they wanted from the project. Their expectations and demands were not the same; they had different viewpoints with respect to evaluation and the need for it. And the diversity wasn't all on their side. We, too, engaged with them out of different histories. Specifically, Elaine's evaluation of Project PART was done from a position of first exposure to the organization while Kathryn's evaluation of A-Way Express Couriers was part of an established and ongoing relationship.

The project team dealt with this tension through process, by soliciting feedback from key informants in both cities at critical junctures in the work. We talked and met frequently to discuss this feedback and its implications. Even so, we were never able to achieve a synthesis across sites. This is the reason that "Appropriating Evaluation" is structured the way it is, with back to back rather than single summaries of information from the field. There was no simple synthesis, no uniformity. Rather, for us, the project became an exercise in respecting, working with and across differences.

There were, however, parallels between the sites, not so much in content as in process and outcomes. Although we worked it through differently, we took a similar approach in both places. Most fundamental, we worked in a participatory fashion based on a common commitment to democratic practice. By creating reference groups and through other inclusive means, we tried to use the evaluations to give voice to people who are typically without. Through the questions and issues raised, we used the exercise as a tool for reflection by the organization.

It is perhaps here that we learned the most. We started out thinking that evaluation should be an exercise in critical thought. In the course of the work, we discovered that the groups with which we engaged are stuck between external pressures to define objective outcomes and internal needs to define their own practice. Regardless of the methods used (quantitative or qualitative), few participants found it easy to become critical, to examine how their organizations are located in power relationships. Perceiving this struggle reinforced for us the importance of open, non-bureaucratic leadership and of evaluators who are able to make essential links between lived experience and broader social/political conditions.

Feedback from the organizations in both sites was positive; participants felt that the work we did with them would further their development. We feel encouraged by this. We hope that our journey through the many conversations, dilemmas and decisions of this project will be useful to others.