

# **Evaluation Report**

## **PAN ED Summit & Fund Development Workshop**

**January 20-23<sup>rd</sup>, 2010 – Richmond, BC**

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# Summary of Evaluations: ED Summit Jan 20-23, 2010

The PAN ED Summit held between January 20 and January 23, 2010 was an outstanding success! The Summit provided two important opportunities: it met a long standing need for skills development and it provided an opportunity for EDs to share their thoughts/strategies for coping with the present situation of financial insecurity.

The following report contains the results of the Summit evaluation, which confirm the success of the meeting. The report is divided into three sections, following the design of the meeting agenda. The first section covers the Fund Development Workshop; the second reports on the Sustainability in our Current Climate Workshop; and the final section presents evaluation results of the ED summit as a whole.

## ***I. Fund Development***

**Background:** Given the difficult financial situation facing many of the ASOs in BC, the fund development workshop was exceedingly timely and was well received by the PAN member organizations. There were 40 registrations.

This workshop was designed and delivered by Donna Tennant with the collaboration of Karen Alexander and Andrea Seale. Topics covered at the workshop included:

- Different types of Non-Profit Funding
- The Board's role in Fundraising
- Ethics and Fundraising
- Corporate Sponsorships and Foundations

A written evaluation was distributed to the 40 participants of the workshop; 27 responses were received.

### ***Participant Responses***

1. When asked, *How satisfied were you with this workshop?*

All (100%) participants responded that they were satisfied, with 70% indicating they were very satisfied.

2. When asked, **96 %** of the participants agreed with the following statements:

- *The Fund Development Workshop was well presented.*
- *The Fund Development Workshop presenters were knowledgeable about the topics being presented.*
- *The Fund Development Workshop increased my knowledge of non-profit funding.*
- *I will use/apply the knowledge gained at this workshop in my paid or volunteer work.*
- *The workshop was relevant to me and/or the work I do.*
- *The workshop was of high quality.*

3. When asked, *Do you have any comments/ideas about this workshop that you would like to share, or can you suggest any improvements we could make for future workshops?* participants responded with the following selection of thoughtful/helpful ideas:

- This workshop helped demystify fundraising considerably. At this point I have nothing more to add...very comprehensive. A future workshop may be desirable for entry level fund raisers to approach grant writing basic skills.
- I think having ED's, Board members & fund developers together was brilliant allowing us to focus on specifics. All presenters were great!! Wasn't even hard to stay awake after lunch! And great to be able to talk with other EDs.
- Excellent workshop – after doing fundraising for years I wondered if I would learn anything new-yes I did! Lots! Thank you.
- Ethical discussions need real-life examples i.e. “applied ethics” rather than hypothetical, same for corp. sponsorships and foundations grant making-just a little more applied grant writing on corp. sponsorship info would be good. Thank you for bringing Andrea Seale to this workshop. She is fabulous!! Lovely facilitating & finding a balance between teaching and group participation Thank you!
- More time for interactive discussion
- Just a bit too long. Keep the day to 6 hrs. maximum.
- I would suggest focusing on specific needs of audiences e.g. Workshop for fund development staff; one for the Board; one for rural orgs; one for EDs who raise money off the side of their desks etc. Different size/resource level of organization has a large impact on what is needed in a workshop.

## ***II. Sustainability in our Current Climate***

**Background:** Kylie Hutchinson from Community Solutions facilitated this one day workshop focused on the concept of program sustainability, the factors that promote program sustainability and the tools to analyze and address threats to program sustainability. The workshop had 28 ED participants. At the end of the session twenty (20) participants completed written evaluations which had been designed by the facilitator to accompany the session.

### ***Participant Responses***

1. When asked, *Did the instructor cover all the learning objectives?*

All (100%) of the participants agreed that all the learning objectives were covered, with 80% of the participants strongly agreeing.

2. When asked, *Was the instructor knowledgeable about the subject matter?*

Again, all (100%) of the participants agreed that the instructor was knowledgeable about sustainability, with 80% of the participants strongly agreeing.

3. In responding to questions about the facilitator's skills, the participants praised her with the following comments:

- Interactive, relaxed
  - Inclusivity-remembering names
  - Knows the subject matter
  - Excellent facilitator-loved the toys-they helped me relax
4. When asked, *How the instructor could improve?* the participants made no suggestions about the instructor but included two suggestions about the design of the workshop:
    - Allow for more discussion and creative discussion re: the current situation
    - Provide an opportunity to discuss material in relation to their work/organization
  5. When asked, *If they felt confident to apply these new skills at their work?* the responses were again very positive. Almost all (95%) of the participants felt they could apply the new skills.
  6. When asked, *If the workshop provided good value for the time spent at it?* the responses were again very positive. Ninety-five (95) % of the participants agreed that the workshop provided good value for the time spent.
  7. General comments:
    - Well Done - I learned a lot
    - Awesome exercises that also created networking and new partnerships
    - Very timely and much appreciated. I especially enjoyed the sense that our intelligence and experience was respected Great workshop - lots of information - but makes me wonder when I get the resources to do this...
    - Again, I think it was a great idea to have a skills building specific to ED's and have the opportunity to be together. The only comment I would have is if I could have had a more thorough and specific agenda of what the days were going to be like, it would have given me a better idea of what was going to happen. For instance, yesterday, for the fundraising I would have brought a board member.

### **III. Overall ED Summit Evaluation**

**Background:** On Friday, the final day of the ED Summit, there were three sessions: first, there was an open discussion on topics chosen by the EDs; then there was an Update & Community Consultation Session on STOP (Seek and Treat for Optimal Prevention of) HIV/AIDS Program (also known as "Expanded HAART") conducted by Ciro Panessa, Ministry of Health Living and Sport & Representative from BC Centre for Excellence in HIV/AIDS; and finally, a session entitled *ED to ED: Keeping Ourselves Strong*. Two of the sessions were facilitated by Susan Dann; the HAART session was facilitated by Jennifer Evin Jones. There were 25 participants in all; sixteen written evaluations were collected.

#### **Participant Responses:**

1. When asked, *Overall, how satisfied were you with the ED Summit?*

All (**100%**) participants responded that they were satisfied, with 82% of the participants indicating that they were very satisfied.

2. When asked to rate the three sections of the Friday Ed Summit, participants indicated a very high level of satisfaction with all sections. There was agreement and strong agreement to all of the following statements; no negative responses were collected.

	<b>Strongly agree</b>	<b>Agree</b>
The Friday morning open discussion was of high quality.	10	6
The Friday morning open discussion was relevant to me and/or the work I do.	8	8
I will use/apply the knowledge gained at the Friday morning open discussion in my paid or volunteer work.	7	9
The Update & Community Consultation on STOP HIV/AIDS Program was of high quality.	7	8
The Update & Community Consultation on STOP HIV/AIDS Program was relevant to me and/or the work I do.	11	5
I will use/apply the knowledge gained at The Update & Community Consultation on STOP HIV/AIDS Program in my paid or volunteer work.	11	4
The ED to ED Keeping Ourselves Strong session on Friday afternoon was of high quality.	6	9
The ED to ED Keeping Ourselves Strong session on Friday afternoon was relevant to me and/or the work I do.	8	7
I will use/apply the knowledge gained at ED to ED Keeping Ourselves Strong session on Friday afternoon in my paid or volunteer work.	8	6

3. When asked, Do you have any comments/ideas about this meeting that you would like to share?, the participants gave the following responses:

- Kudos!
- I loved the title (ED Summit)
- Thanks for organizing a very helpful conference
- Great job! Kylie session excellent. Good program! Appreciated hearing from Ciro. Thank you PAN! Very relevant topics, workshops and presenters. Glad that Heidi was attending and to hear from Renewing Our Response.
- Pushing the leadership development that we all talk about but usually gets turfed when budgets tighten.
- Excellent!
- This was very valuable. All aspects! Thank you. Let's keep doing this.

- Excellent opportunity for networking, valuable building of capacity in a time when opportunities are limited.
  - The opportunities for discussion amongst ED's were invaluable.
  - I learned a lot of valuable tools which I will take back
  - It met so many of my needs –learning networking, etc. Thank you.
4. When asked, *Can you suggest any improvements we could make for future ED summits?* the participants gave the following responses:
- Stay focused on specific topics, allowing for the in depth look
  - Possible future work with Board Chairs attending as well for part of the sessions?
5. When asked, *Can you suggest topics for the next ED Summit, which will be taking place in fall 2010?* the participants gave the following responses:
- It will depend on the financial & environmental climate at the time
  - How to deal (on deeper levels) with staff and volunteer issues-several different issues. Don't know if this is possible however, I think it would be interesting to do "job shadowing" of other EDs especially in different urban/non urban areas, or anything similar or practical to this
  - Aligning your organization around your mission.
  - Follow up on STOP. Hear about PAN's work to try meet with the Ministers.
  - Budgeting. P&L statements-prepping for staff use and for Board. Succession planning workshop (PHSA might be able to support this. How to nurture the new generation of leaders in the BC HIV movement)
  - More time for regional networking-thanks for being flexible this time.
  - Program development, human resources, and the future of ASOs
  - Environmental Scan-Where is AIDS going?