

RESEARCH METHODOLOGY REPORT

The Women's Economic Development Collaborative Fund

Canadian Women's Foundation



Eko Nomos
Program Development Consultants



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LIST OF PRACTITIONER RESOURCES:

The following additional documents are available in PDF format.

To download the PDF files, click on the links below or in the document, or visit the Publications and Resources section of the Canadian Women’s Foundation website: www.canadianwomen.org.

- Beyond Survival: Helping Women Transition Out of Poverty — Final Report
- Beyond Survival: Helping Women Transition Out of Poverty — Executive Summary
- Practitioner Resource #1: Sustainable Livelihoods Backgrounder
- Practitioner Resource #2: The Stages of Transformation to Sustainable Livelihoods
- Practitioner Resource #3: The Sustainable Livelihoods Framework
- Practitioner Resource #4: Map of Expected Outcomes
- Practitioner Resource #5: Learning and Evaluation Framework
- Practitioner Resource #6: Baseline Data – All Participants
- Practitioner Resource #7: Workshop Outlines
- Practitioner Resource #8: Charting Participant Progress
- Practitioner Resource #9: Generic Grantee Work Plan
- Practitioner Resource #10: Instructions & Questions – Interview 1
- Practitioner Resource #11: Baseline Data – Portrait Participants
- Practitioner Resource #12: Instructions & Questions – Interview 2

About This Report

This report presents the learning and evaluation methodology used for the Canadian Women's Foundation (CWF) Economic Development Collaborative Fund program.

The Collaborative Fund was a five-year \$4.8 million program that provided financial and technical support to ten community programs across Canada that helped low-income women transition out of poverty and build a sustainable livelihood.

This Methodology Report provides an overview of our approach and offers links to Practitioner Resources that will assist other organizations to integrate practical, continual, asset-based evaluation.

Introduction

One of the major achievements of the Collaborative Fund was the design and development of the learning and evaluation research. Given CWF's commitment to learning and capacity-building, it made sense to ground the outcomes research and evaluation in collaborative learning that would acknowledge their grantees' extensive knowledge and expertise in promoting women's livelihoods.

CWF adopted a developmental approach to evaluation and hired Eko Nomos, the consulting firm that had facilitated the previous learning, to continue the work that had begun with the earlier fund:¹

Developmental evaluation refers to long-term, partnering relationships between evaluators and those engaged in innovative initiatives and development. Developmental evaluation processes include asking evaluative questions and gathering information to provide feedback and support developmental decision-making and course corrections along the emergent path....

The evaluator is part of a team whose members collaborate to conceptualize, design and test new approaches in a long-term, ongoing process of continuous improvement, adaptation and intentional change. The evaluator's primary function in the team is to elucidate team discussions with evaluative questions, data and logic, and to facilitate data-based assessments of where things are, how are things unfolding, what directions hold promise, what directions ought to be abandoned, what new experiments should be tried – in other words, data-based decision-making in the unfolding and developmental processes of innovation....²

Building on the success of the first CWF Economic Development Consortium 1997-2001 and the learning papers that were produced as a result, we committed to continue deepening our understanding of the Sustainable Livelihood approach. Sustainable Livelihoods has been a grounding concept for the Collaborative Fund, offering a conceptual framework, clear language, new effective practice and tools to grantees and funders alike. (Please see [Practitioner Resource 1: Sustainable Livelihoods Backgrounder](#).)

¹ The first collaborative fund (1997 to 2001) was called the Canadian Women's Foundation Economic Development Consortium. It resulted in the two-part publication documents about the learning of the consortium called *Women in Transition Out of Poverty*. <http://www.cdnwomen.org/PDFs/EN/CWF-WIT-asset.pdf> and <http://www.cdnwomen.org/PDFs/EN/CWF-WIT-guide.pdf>

² Learning and Evaluation for Trail Builder Initiatives in Vibrant Communities, *Caledon Institute, Spring 2005*.

Since the adaptation of the Sustainable Livelihoods framework in Canada in 2001,³ Sustainable Livelihoods has grown and flourished as a 'field of practice' for supporting poverty reduction and women's economic development. It has been adopted and adapted by many organizations across Canada, each with its own way of using this versatile framework and tools.⁴ Sustainable Livelihoods has been applied to everything from strategic planning with Boards to skills assessment with participants.

However, Sustainable Livelihoods has primarily been used for planning and implementing social and economic development initiatives. Eko Nomos has been working to promote the application of Sustainable Livelihoods to program evaluation by extending the day-to-day use of the tools to develop a foundation for documenting results and assessing progress. The Collaborative Fund research and learning initiative became an opportunity to pilot a project that assists organizations to build evaluative thinking into project planning and implementation cycles.

The evaluation was grounded in a 'theory of change' that was grounded in the Sustainable Livelihoods framework. (Please see: Practitioner Resource 2: The Stages of Transformation to Sustainable Livelihoods.) The research team identified the stages of transition that women often move through as they build livelihoods, and the evaluation focused on learning about process, outcomes and effective practice:

*[A] theory of change, no matter what it is officially called, is central to prospective policy change evaluation. In any prospective, forward-looking evaluation, a program's theory guides the evaluation plan. Reciprocally, the evaluation provides feedback to a program as it evolves; it becomes a key resource in program refinement.*⁵

Thus, in 2004 CWF, its grantees and Eko Nomos embarked on long-term collaborative learning that changed the way we think about women's livelihoods, economic development practice and evaluation. Eko Nomos introduced the grantees to a new approach to outcomes documentation: working from an asset-based outcomes framework, grantees interviewed a representative sample of participants, creating 'portraits' of the women and their livelihood progress. This portrait research was designed to give both participants and practitioners a voice in the research, while offering a cost-effective alternative to full-fledged impact research.

The detailed information and learning profiled in the final report is the result of four years of local learning, work, processing and analysis in 10 communities across Canada.⁶ (Please see the final report: Beyond Survival: Helping Women Transition Out of Poverty.) The research was successful due to the dedication of the grantee staff who became 'practitioner-researchers' and also the trust, openness and commitment of the women who participated in funded programs.

³ The Sustainable Livelihoods framework was first developed by the Institute for Development Studies, Brighton, U.K. in cooperation with the U.K. Department for International Development (DFID). For more information about their approach go to: *Livelihoods Connect – Sustainable Livelihoods Guidance Sheets*, <http://www.eldis.org/go/livelihoods> (Last sourced February 2010).

⁴ For an overview of Eko Nomos' extensive work with Sustainable Livelihoods, through the Toronto Enterprise fund, Ontario Women's Directorate and other projects, please visit www.ekonomos.com.

⁵ Kendall, Guthrie, et al. *The Challenge of Assessing Advocacy: Strategies for a Prospective Approach to Evaluating Policy Change and Advocacy*, The California Endowment, Woodland Hills, October 2005, p. 13 – 14.

⁶ 10 grantees began the research and learning process. Two did not complete the full term of their grant, so only eight grantees completed their portrait research process.

Although intensive, this research strategy created a high return on investment for all grantees. They have strengthened their programming and incorporated evaluative thinking into their ongoing work. They are more analytical, and give participants a voice in the assessment of their programs; thus the women who participate in these programs have gained from this approach as well.

Sustainable Livelihoods evaluation practice is transformative at multiple levels (for the funder, organizationally and for the participants themselves) and has much potential to be adapted by grass-roots economic development and poverty reduction initiatives.

Purpose and Scope of the Learning and Evaluation

The design of the learning and evaluation was ambitious. CWF chose to position the Collaborative Fund as a vehicle for learning and capacity building, in order to strengthen practice in growing women's livelihoods through economic development programming. CWF balanced that interest with a commitment to program and results accountability, incorporating an evaluation of the Collaborative Fund, portfolio and outcomes.

The purpose of the evaluation was threefold:

1. To build Collaborative Fund's internal capacity to design, deliver and fund programs that achieve strong livelihood outcomes
 - Strengthening the capacity of grantees to document outcomes and evaluate program delivery
 - Integrating an understanding of asset-based, livelihood-oriented thinking into grantee programming
 - Incorporating results-based management approaches and practice into Collaborative Fund grantmaking and the program delivery cycle
2. To capture learning about effective practice in women's economic development
 - Building a collaborative learning culture
 - Developing an understanding of how women participate in self-employment and social purpose enterprise, and how they benefit from it
 - Documenting strategies for effective livelihood development, and for strong program design and implementation
3. To ensure accountability for program effectiveness and results
 - Tracking and analysing program performance statistics
 - Capturing highly textured, qualitative information about outcomes
 - Performing a formal evaluation/stakeholder review near the end of the project

Background – A Long-Term Investment in Accountability and Learning

CWF has been very systematic in building a foundation for its learning and evaluation: even before the launch of the second collaborative fund, it made a substantial investment in the ability of the women's community economic development sector to undertake results-based planning. In its cross-Canada series of National Skills Institutes during the summer of 2003, CWF hired Eko Nomos to introduce women's organizations to the Sustainable Livelihoods asset-based outcomes framework and the use of logic models

in project planning, and to provide them with a brief overview of social purpose enterprise. All of the current grantees had completed basic training in results-based management tools before they were selected.

CWF has strived to create a learning culture in the Collaborative Fund, and open working relationships with grantees in an environment where learning, sharing and innovation flourish. From the start, CWF established strong communication among grantees. The past four years have seen the development of informal networks and cooperation among grantees. Regular tele-learning sessions and on-line discussions have added to this collegial exchange.

At the beginning of the second Collaborative Fund evaluation in 2004, CWF and Eko Nomos set up monitoring systems and protocol based on CWF's high-engagement approach to grant making. CWF continued the collegial approach to managing its grant-making portfolio that it had developed during the original Consortium. Eko Nomos collaborated with CWF to review the narrative, statistical and financial reporting requirements and to refine the existing systems and tools for this reporting.

At the first national grantee workshop in 2004, Eko Nomos worked with the grantees to customize the Sustainable Livelihoods framework (Please see [Practitioner Resource 3: The Sustainable Livelihoods Framework](#)) and to clarify the expected outcomes in the five asset areas (Please see [Practitioner Resource 4: Map of Expected Outcomes](#)). Statistical data collection and database content were tailored to reflect both the target populations and economic development work of all the grantees.

The monitoring system was grounded in a results-based management approach. Grantees actively used their logic models, and were asked to report their progress and outcomes in reference to their proposed workplan, deliverables and outcomes. CWF also instilled a results-management approach into portfolio management, carefully reviewing the monitoring statistics that are gathered by each site, and organizing regular check-in calls and site visits to review progress in the context of logic model objectives, activities and outcomes.

With solid accountability and a learning orientation, CWF turned its sights towards a strategy of learning and evaluation.

A Grassroots Learning and Evaluation Strategy

The learning and evaluation strategy was implemented in two components as outlined below (Please see [Practitioner Resource 5: Learning and Evaluation Framework](#) for a chart that details the research priorities, questions, methodologies, deliverables and timelines).

Component 1: Outcomes evaluation and learning about effective practice

In 2004, CWF and Eko Nomos launched a four-year outcomes research initiative. This portrait research builds the capacity of Collaborative Fund grantees to document the results of their interventions and to strengthen program design. Teams from each grantee organization participated in a series of annual workshops that systematically developed the tools, processes, systems and capacity to document grantee outcomes. Together, the eight sites, CWF staff and Eko Nomos formed the collaborative research team that guided learning and evaluation.

Using the holistic, asset-based framework which emerged from the first Economic Development Consortium, grantees collected baseline data about all their participants (Please see [Practitioner Resource 6: Baseline Data – All Participants](#)), provided workshops on the Sustainable Livelihoods frameworks for participants (Please see [Practitioner Resource 7: Workshop Outlines](#)) and created 'asset maps' to document changes in asset levels, and assessed participants' progress towards a sustainable livelihood (Please see [Practitioner Resource 9: Charting Participant Progress](#)). In addition to this foundation of more traditional research practices, front-line staff from each of the grantee organizations were selected to become 'practitioner/researchers' and trained for two in-depth interviews with a representative cross-section of 12 participants at each site; the practitioners, combined, interviewed a total of 96 women.

The portrait interviews were designed to give the women who participate in programs a voice in the research. The interviews provide detailed insight into the changes that result when women participate in economic development programs, and deepen our understanding. With the completion of the second interviews in spring 2007, it was possible to create a highly textured picture of women's livelihood strategies, the outcomes of their participation, and the livelihood development interventions that are most effective in supporting them.

Guiding Research Questions

How do women develop a livelihood?

- What strategies do women use to build a livelihood? What stages do they go through as they move towards independence and self-sufficiency?
- What barriers make it difficult for women to progress towards a livelihood?
- Why do women choose self-employment/social purpose enterprise? What are the advantages/disadvantages of these options?
- What strategies do organizations use to build women's assets and support transitions (in program delivery, community development and partnership)?

What is the quality of that life/livelihood?

- What is the nature of the work offered by self-employment/social purpose enterprise employment (hours, remuneration, viability, flexibility, independence, security, etc.)?
- What is the relationship between household dynamics (access and control) and livelihoods? What are daily patterns of work/quality of life?
- How viable are the women's businesses? Given the women's circumstances, do they have other employment options that might be more viable?

What policy issues are related to women's livelihoods?

- What are the key policy impediments facing marginalized women as they work to build their livelihoods?
- What barriers are related to the mainstream perception of 'women's work' and so-called 'non-standard' work (e.g. part-time, seasonal and casual work, self-employment)? What are the implications for benefits/economic security?
- How can we create a case for the importance of women's community economic development?

The portrait research was implemented slowly and systematically to ensure that grantees understood their roles, responsibilities and deliverables. The implementation was designed with a 'just-in-time' approach, following these phases.

Phase 1: Foundation building (May 2004 to September 2005)

Phase 2: Participant tracking and asset mapping (September 2005 to May 2006)

Phase 3: Participant portrait interviews and ongoing analysis (June 2006-May 2007)

Phase 4: Closure of the research (summer 2007- winter 2008)

The collaborative research culminated in eight outcomes reports (one for each of the Collaborative Fund grantees), and a paper exploring outcomes, effective practice, and learning. The process was concluded in the winter of 2008 with a national grantee meeting to share findings, verify outcomes, and deepen our analysis.

Below we have included a detailed description of the portrait research, for funders and practitioners with an interest in capacity building approaches to evaluation.

Component 2: Formal evaluation of the Collaborative Fund

The second component of the learning and evaluation was a two-part Stakeholder Review. Eko Nomos implemented a formal evaluation involving intensive key informant interviews first with grantees in January 2007, and then with the donor partners and CWF staff in June 2007. The intent was to learn from the implementation of this five-year collaborative partnership, and to assess both the effectiveness of the Collaborative Fund and grantee and funder satisfaction.

The Learning and Evaluation Framework, mentioned above, details the main areas of inquiry, which include:

- Effectiveness of program grant-making – implementation and design
- Assessments of the following program deliverables:
 - Learning and evaluation of the Collaborative Fund portfolio of projects
 - Outcomes evaluation capacity building
 - Promoting grantee learning
 - National Skills Institutes
- Stakeholder satisfaction
- The Collaborative Fund's leadership in grant making and in community economic development
- Policy issues affecting the Collaborative Fund

The Stakeholder Review led to an initial Interim Evaluation Report in February 2007, based on the interviews with grantees. In August 2007, Eko Nomos produced a stakeholder review report with the insights, comments and suggestions of donor-partners and grantees, analysing the progress of the Collaborative Fund, and offering suggestions for the future design and implementation of the fund.

Details of the Portrait Research

The outcomes research was designed to unfold in four phases:

Figure 1: Overview of the Portrait Research Methodology

Timing:	May - September 2005	Summer 2005 - May 2006	May 2006 - June 2007	2007 - 2008
	Phase 1: <i>Foundation Building</i>	Phase 2: <i>Participant Tracking and Outcomes Documentation</i>	Phase 3: <i>Participant Portrait Interviews and Ongoing Analysis</i>	Phase 4: <i>Closure of the Research Process</i>
Purpose of the Research Phase	Building the capacity and systems to implement outcomes research and learning	Documenting participant progress during their formal involvement with the program (all participants in research intake)	Annual Interviews with the 12 participants after they leave the program	Exit data collection and documentation, local analysis and reporting
Staff Responsibility	PROGRAM STAFF		PRACTITIONER / RESEARCHER	
Scope of Activity	All participants in "Research Intake"		12 Portrait Research Participants	
Deliverables:	<ol style="list-style-type: none"> ① Planning, Staffing and Systems in place 	<ol style="list-style-type: none"> ① Baseline statistics ② Participants map their assets at the beginning and end of the program ③ Business consulting / assessment notes (self-employment only) 	<ol style="list-style-type: none"> ① First portrait interview (June 2006) ② Second portrait interview (April 2007) ③ Annual analysis of results at national grantee meeting 	<ol style="list-style-type: none"> ① Exit statistics ② Final assessment of livelihood progress ③ Assessment of business progress (self-employment only)
	DURING FORMAL PROGRAM		AFTER FORMAL PROGRAM	

Phase 1: Foundation building (May to September 2005)

In this planning phase, the Collaborative Fund began to facilitate the development of a collaborative learning culture. With a new round of funding, Eko Nomos provided input and technical support to the grant-making, and to more traditional accountability systems. A statistical and narrative monitoring system was designed. Grantees were introduced to the portrait research as a means of building the tools and capacity for them to participate in the learning and evaluation. A generic grantee work plan (Please see [Practitioner Resource 10: Generic Grantee Work Plan](#)) clarified timing, activities and deliverables for all of the evaluation phases.

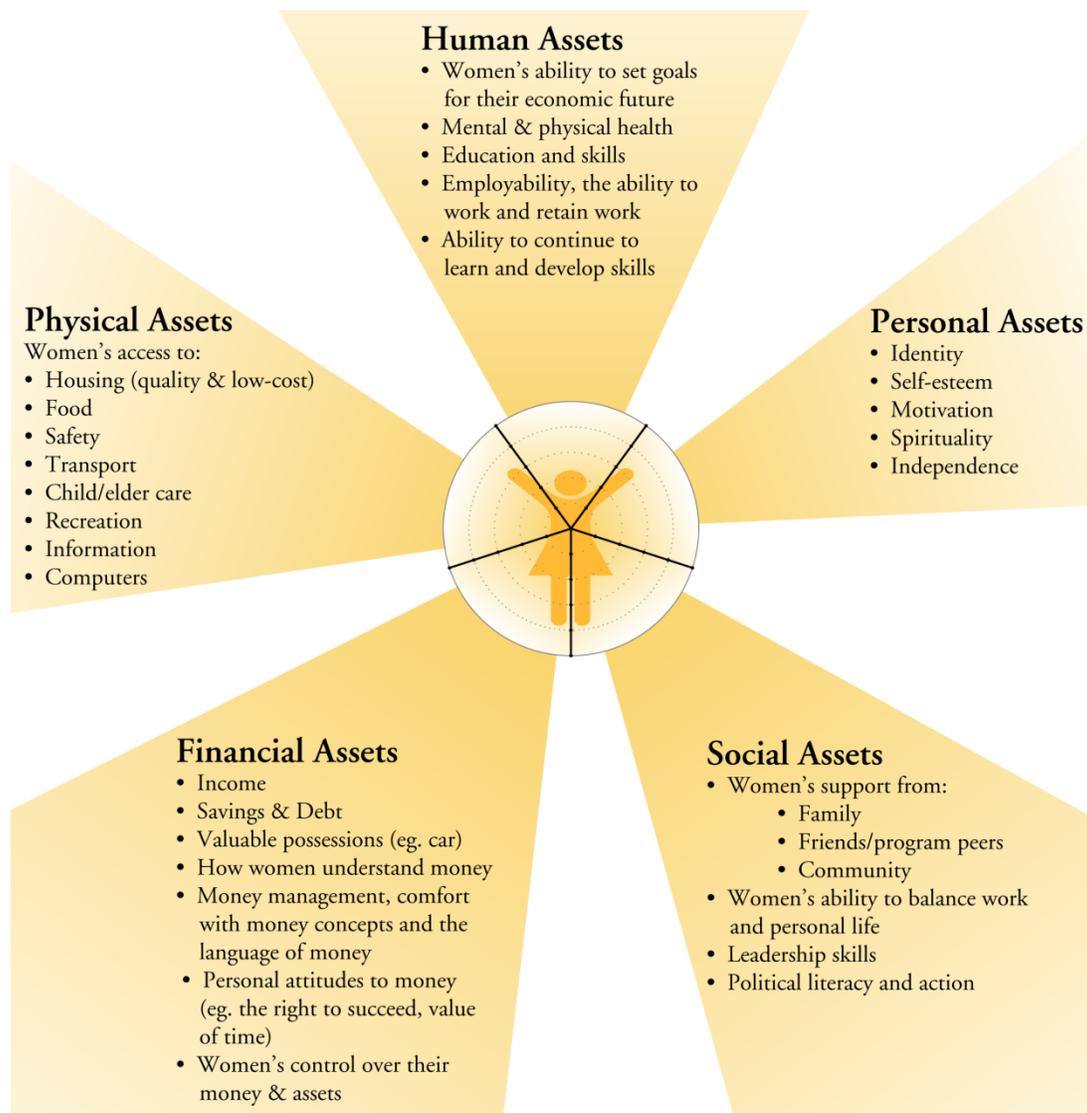
As a part of the terms of the Collaborative Fund initiative, each of the grantees agreed to invest and participate actively in the research and learning. Each site brought together staff, volunteers and past participants to implement the research and analyse the results. The Collaborative Fund invested an additional \$6,000 per site to acknowledge the additional time and expense related to the interviews, data collection and analysis. We know that the sites invested substantial additional resources in order to include additional staff and to take the research deeper into their organizations.

Two representatives of each of these local research teams came together annually with all of the other teams, CWF and Eko Nomos to guide the overall process. This national collaborative research team intentionally revised and redesigned the Sustainable Livelihoods framework and tools that had been developed during CWF's Women's Economic Development Consortium and published in 2001/2002. The team incorporated new thinking about assets and the transformation that women go through as they move

out of poverty, and re-crafted the documents in clear language. The conceptual tools of Sustainable Livelihoods have been repackaged, visually strengthened and translated into French.

Figure 2 provides an overview of the asset map that the practitioner-researchers developed to describe the outcomes they anticipate as a result of participation in the funded programs. This diagram is the base upon which we developed our strategy to explore outcomes.

Figure 2: Collaborative Fund Asset Map – Profiling Expected Outcomes



Phase 2: Participant tracking and asset mapping (September 2004 to May 2006)

During the second phase, Eko Nomos facilitated a consultative process to design, develop and implement a user-friendly, cost-effective monitoring system, grounded in a results-based accountability and management approach. CWF and grantees together identified priorities, features and outcome indicators in order to provide all stakeholders with critical statistical, narrative and financial information, and to ensure effective accountability to the funders.

The result was a common, statistical reporting system that collected and organized detailed information about each grantee program's scope of participation and participant demographics, as well as an overview of key outcomes that were tracked for all participants. A narrative report was designed to incorporate the discipline of results-based accountability (using logic models that grantees had developed during the cross-Canada National Skills Institutes, which Eko Nomos had facilitated in 2004 as a part of the intake for the Collaborative Fund). Collaborative Fund protocol for reviewing and analysing grantee results was also developed and implemented.

At the same time, planning of the portrait research commenced. Phase 2 launched asset mapping (Please see [Practitioner Resource 10: Instructions & Questions – Interview 1](#)) designed to support each grantee organization to collect more detailed information about all of the participants of the research intake in September 2005. The research focused on the women who entered each program during the fall of 2005, although at some sites women from earlier intakes were included in order to meet the required number of portrait research participants. The intention was to track the changes in women's lives over an 18 month period starting with their entry into an economic development program.

In fall 2006, additional baseline/exit statistical information (Please see [Practitioner Resource 12: Baseline Data – Portrait Participants](#)) was collected about the group of incoming participants from whom the portrait research participants would be chosen. This helped the team gather baseline data for all the portrait research participants, even though they had not yet been selected to participate in the research. These statistics have provided demographics information on the cluster of portrait participants.

At each of the two portrait interviews, further information was collected, giving the research team a wealth of in-depth, highly textured information about everything from income and employment to the status of health. This component of the database has also allowed us to make 'counts' of various qualitative indicators (for example, the number of women who have improved their income as a result of participation in a funded project).

In summary, the project collected two sets of statistics:

1. Overall statistical database tracking **all** participants in programs:
 - Participant demographics/baseline information
 - Program participation statistics
 - Participant outcomes
2. Outcomes database focusing on the findings of the portrait interviews with 12 women at each site:
 - Including more information about demographics, participation and asset development outcomes.

Phase 3: Participant portrait interviews and ongoing analysis (June 2006-summer 2007)

In spite of demanding work schedules, staff generously offered their time and expertise to the portrait interview process, resulting in a deep, qualitative understanding of program outcomes.

Each portrait consisted of:

- Baseline information.
- Asset mapping at intake, program end and at each of two interviews to track the women's perceptions of changes in their asset levels (see Figure 1 for a sample asset map).
- A one-on-one in-depth (2-3 hour) informal interview with each portrait participant, exploring the changes in her life since becoming involved in Collaborative Fund programming (after the first half-year of participation in the program).
- A follow-up interview (one year later) designed to explore changes since the previous interview.
- Documentation of quotes and stories illustrating the women's perspective of the research.
- A review and analysis of each interview using a portrait summary form, resulting in a brief document summarizing what each of the portrait interviewees said and profiling their stories.

Each team chose one or two practitioner-researchers to organize and implement the portrait research. The intent was to draw upon the practitioners' extensive experience while also building on the strong relationships of trust that they create with participants. In all, 12 staff and three externally hired researchers were involved in interviewing at the eight sites. Most sites took a team-based approach to completing the interviews, some carving up the work and others doing team interviews. All of these practitioner-researchers learned a great deal about research techniques and how to incorporate evaluative thinking and practice into their day-to-day work.

In fall 2005, the selection of portrait research participants began. They were eligible to participate if they were a part of the site's research intake group (having entered the program during the summer/fall of 2005). At local information sessions, research teams oriented eligible participants to the purpose and expectations of the research. Women who were interested in participating were asked to put their name forward. At that point, practitioner/researcher teams selected a slate of 12 women and made efforts to ensure that they represented a good cross-section of all those participating in the program. In the smallest program, these 12 women represented half of all participants who had participated. In the case of the largest program, the 12 represented about 4% of all participants. 12 women (96 women overall) were selected to participate in the outcomes research.

The decision to work with 12 women more intensively was the result of the difficulty and expense of collecting extensive statistical information about all participants. The grantees simply do not have the staffing and other resources required to follow up on their participants' accomplishments after they have left the program. The collective wisdom was that by doing in-depth interviewing with a sampling of women that reflected the diversity in the programs, it would be possible to create a detailed picture of a holistic range of outcomes, and to put these qualitative and quantitative indicators of progress into context. In short, learning

about a cross-section of women would provide insight into the dynamics of livelihood development, and offer learning that could be extrapolated to the larger population.

At the annual grantee meeting, Eko Nomos facilitated a two-day workshop at which the front-line practitioner-researchers were introduced to interviewing and tools. All had the opportunity to practice interviewing low-income women, who came from Sistering, a Toronto-based organization that serves street-involved women in Toronto. These women kindly offered interviewers feedback on their interview skills and on the process.

The first portrait interviews were completed in June 2006, just after practitioner-researchers left the annual grantee meeting with a plan of action, interview tools and practical training. The portrait participants were paid \$20/hr for their time and were very positive about the interview as a personal learning experience. By and large the interviews went very smoothly, and the practitioner-researchers were happy with the research tool and the quality of the process. The interviews were designed to be friendly, relaxed, informal discussions, and were grounded in an exploration of the five Sustainable Livelihood asset areas. While most interviewers noted that there were no dramatic surprises about the women, they also told us that the interviews had allowed them to gain a much more in-depth understanding of the women's lives and of the goals, needs and livelihood strategies that they bring to the program.

The second portrait interviews began just under a year later during the period from late March to May 2007. The format for the second interview (Please see [Practitioner Resource 12: Instructions & Questions – Interview 2](#)) was tailored to each portrait participant's circumstances, so it was possible to shorten the second interview while still delving into the important questions of work-life balance, quality of work and progress towards a livelihood. The completion of the second interview made it possible to do a comparative analysis of the two interviews and create a clear picture of the changes that had occurred in women's lives.

At the time of the asset mapping, site research teams also collected detailed qualitative statistical information about the businesses owned by the 12 portrait research interviewees at each self-employment site. Through this information, we have been able to explore the types of businesses, their level of success, and their ability to generate income for the owner and employment for others.

Phase 4: Closure of the research (summer 2007- winter 2008)

After each interview, the practitioner-researchers completed an interview summary form that summarized learning, assessed progress, captured quotes and identified patterns of asset development. Early findings were also incorporated into the grantees' semi-annual narrative progress report in the fall of 2006.

At the end of the second interviews Eko Nomos completed on-site analysis sessions with each of the eight research teams, in May and June 2007, meeting with practitioner-researchers and senior staff to reflect on the women's lives and changes. We wanted to verify and explore the qualitative and quantitative data, to summarize the findings, to identify learning and to begin to write the report on outcomes. These intensive, two-day sessions were very successful, and research teams told Eko Nomos that they were satisfied that the perspective of both participants and practitioners had been well represented.

Once program review meetings were concluded, Eko Nomos began detailed analysis of the results, initially for each site, and then merging all the local results to create a combined, national picture of outcomes. From July to October 2007 Eko Nomos organized analysis sessions, conferred with research partners, and

wrote/edited the core report on the research, plus a detailed site outcomes report for each of the eight grantees who completed the research.

The final phase of the learning and evaluation took place in early 2008. CWF worked with Eko Nomos in March 2008 to organize a two and a half day national grantee meeting in order to: bring all of the research teams together to share the findings; advance our understanding of women's economic development, and close out the research.

Learning from the Research and the Sustainable Livelihoods Approach

This Collaborative Fund learning and evaluation has offered grantees a wealth of information, tools and concepts to support them to assess and strengthen their programming with women. The eight grantees received substantial capacity building in two key areas:

- 1) A deepening of the Sustainable Livelihoods approach to women's program design and practice, and
- 2) A foundation-building process to support the documentation and evaluation of program outcomes.

These two interventions have been highly influential in improving Collaborative Fund program quality and results. Below, we explore the outcomes of the Collaborative Fund's investment in the learning and evaluation. These comments summarize our learning from a series of stakeholder interviews that were done with the grantee agencies, reviewing the outcomes of their learning, and assessing their satisfaction with the Collaborative Fund.

CWF created a strong culture of collaboration and learning in the program

The Collaborative Fund has succeeded in building grantee collegiality and creating a 'ferment' of learning amongst and within the grantee organizations. Sustainable Livelihoods and economic development were very influential in improving program effectiveness and outcomes. The grantees appreciated the emphasis on practical knowledge, skills and tools. All were impressed by the Collaborative Fund's commitment to learning and to the focus on effective practice in women's economic development and outcomes research. In addition to building its internal capacity as a grant maker, the CWF Collaborative Fund has greatly advanced general learning about the development of grantee capacity for evaluation and evaluative thinking.

Practitioner-researcher quotes:

- *"No-one else is doing this work! We really appreciate it."*
- *"The learning is so important. It gives us the time to think about what we are doing."*

Donor-partner quotes:

- *"The future of learning and evaluation? We need to continue with learning, Sustainable Livelihoods – building capacity. We have to find ways to get more stories. We should cover something about the Fund's return on investment. That information is important for grantees as well... and for fundraising."*
- *"I really liked the Sustainable Livelihoods materials. That thinking would never have gone as far without this Fund. That's transformative work at multiple levels."*

Although labour intensive, the research was perceived as unique and contributing great value to practitioners.

The portrait research was the focal point of four years of national grantee meetings. While the time commitment was substantial, grantees all noted that they learned a great deal through this hands-on outcomes research and evaluation.

Overall, there has been a substantial return on the investment in evaluation, building grantees' capacity to incorporate evaluative thinking into their ongoing program cycle. They all learned a great deal through the research, and expressed a firm commitment and organizational motivation to improve program practice and outcomes. They have now developed the internal capacity to gather and analyse information that will assist them in assessing the effectiveness of their work. They have also changed their approach, asking not only "what are the results of our work?" but also the more difficult question "did we do the right things in our work?"

The grantees agreed unanimously that this evaluation has been useful and worthwhile. The process has successfully introduced evaluation practice into participating organizations; however, the knowledge has been captured by individual staff and has not in all cases been sufficiently internalized or formalized in organizational management systems to allow the organizations to continue with systematic ongoing evaluation. CWF and its grantees are encouraged to maintain their investment by sustaining evaluative practice.

Grantees confirmed that the outcomes report from this process will be useful to them in their relationships with funders, as well as in future planning. These are significant returns that will continue to have positive effects on the Collaborative Fund grantees well into the future.

Networking has also been an enormous bonus in this project: collegial relationships developed among the sites, which have resulted in sharing information and ideas between meetings. Mutual learning and support are obviously vital to practitioners, and they are eager for more.

Practitioner-researcher quotes:

- *"The research produces tangible outcomes. We'll use the outcomes from this research to go forward to try new programs and directions."*
- *"The research was holistic – we have learned so much on so many levels. We are very privileged. This evaluation work with CWF gives us more credibility."*
- *"This research gives us more of a quantitative edge in our reporting to funders."*
- *"I would like to see the research continue – it was very valuable."*

Sustainable Livelihoods evaluation practice itself makes a powerful contribution to program outcomes

The grantees praised the Sustainable Livelihoods framework and tools that had been developed and refined from the previous grant round. They observed that the Sustainable Livelihoods framework is beginning to be seen as a field of practice and saw it as a cornerstone of the Collaborative Fund learning strategy.

The combination of Sustainable Livelihoods and the woman-centred, participatory learning and evaluation approach fit with the sector's feminist/anti-oppression analysis. Further, they build participants' and organizations' capacity to review and learn from their work, while also giving them control over the research agenda.

Evaluation capacity building, which reinforced a dual emphasis on livelihood thinking and evaluative thinking in the daily practice of women's economic development, has created exciting new breakthroughs in livelihood promotion practice.

Staff found the Sustainable Livelihoods framework and tools extremely useful in shifting them away from a social work and deficit-oriented perspective towards a more positive, asset-based understanding of women's lives.

The Sustainable Livelihoods framework has provided a common language for change and important tools and concepts (e.g. that of an 'asset' and a 'livelihood') that can be used by both practitioners and participants. Practitioners also note that the framework helps them to communicate the purpose of their work better, resulting in a clearer understanding of its challenges and outcomes.

Many note that Sustainable Livelihoods practice gives them a deeper understanding of low-income women and their needs, thus strengthening livelihood interventions. By focusing on livelihood strategies, programs can act more strategically to remove barriers, and provide the right supports at the right time. They are also able to offer more proactive, long-term support for women's transition towards livelihoods, giving the women more momentum.

Similarly, the collaborative evaluation itself has resulted in new insights and approaches: all of the grantees have begun to refine and redesign their programs from an intentionally holistic perspective. The interviews provide direct and candid program evaluation from participants. In some cases, unexpected criticisms led to rapid program corrections. While these were not serious problems, the changes have improved aspects of program delivery, accessibility and outcomes.

Practitioner-researcher quotes:

- *"The portrait research provides an opportunity for participants to have a 'voice' in program design".*
- *"Doing the research has shown us that there are still many gaps and tremendous needs. Given the opportunity and resources, we see many other services and training programs we could offer women."*
- *"Since being introduced to Sustainable Livelihood tools, my colleagues and I have changed our approach to working with the women. We have adapted all our services correspondingly. The most important and tangible realization we have made and continue to work on is to approach women holistically. We address women not simply as a businessperson (as stipulated by our mission) but holistically, as a woman (mother, spouse, sister, daughter, etc.). We are very aware that women wear all these hats and it is impossible for them to compartmentalize themselves."*
- *"I'm going to continue to use the Sustainable Livelihoods tools. It feels like we've moved our Sustainable Livelihoods work forward."*
- *"The outcomes-based reporting is useful to us. It keeps us focused and analysing our work. ...We've made changes in our program. We've reduced its length and done a plan."*