

Voluntary Sector Initiative Secretariat

Final Report

February 2003

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Introduction

In June 2000, the Government of Canada and the voluntary sector launched the Voluntary Sector Initiative (VSI), a joint project aimed at renewing and strengthening their relationship. With funding of \$94.6 million over five years, the VSI invited more than 125 representatives of the two sectors to sit at joint tables and working groups focusing on how to improve their relationship in a number of key areas — specifically, by:

- Developing a framework agreement that articulates a vision and principles;
- Building the voluntary sector's capacity (i.e., knowledge, skills and means) to respond to Canadians' needs;
- Streamlining reporting requirements and regulations that affect the voluntary sector;
- Proposing a new approach to financing the voluntary sector that is long-term and sustainable;
- Enhancing knowledge about the sector, its scope, nature and operation;
- Increasing recognition of the voluntary sector's contribution to Canadian society; and
- Promoting and supporting volunteerism.

In addition to participating in the joint tables and working groups of the VSI, the voluntary sector provided a range of secretariat and other support to the VSI. The Voluntary Sector Initiative Secretariat (the Secretariat) served as a primary focal point for the activities of a number of VSI groups. Over its two-and-a-half year mandate beginning in June 2000, the Secretariat carried out a range of duties, providing expertise and advice, coordinating research, carrying out administrative functions and overseeing consultation and communication activities.

Several important relationships underpinned much of the Secretariat's work. Secretariat staff worked in partnership with their government counterparts at the Voluntary Sector Task Force (the Task Force) of the Privy Council Office to oversee a range of VSI activities — in particular, the work of the Joint Coordinating Committee and the Joint Accord Table, and public communication activities, such as the VSI website. As well, the Secretariat provided secretariat services to the Voluntary Sector Steering Group (VSSG) — the oversight group directing voluntary sector participation in the first phase of the VSI — and to the two sector-only working groups and two reference groups representing the concerns of Aboriginal and visible minority groups in the voluntary sector. (See Appendix A for a list of members of the VSSG.) Finally, the Secretariat served as the voluntary sector's counterpart to the government-based joint table secretariats.

This report describes the organization and work of the Secretariat over its two-and-a-half year mandate – including its major products, activities and lessons learned – as it carried out two broad roles:

- To support voluntary sector members of joint tables, sector-only working groups and reference groups and the VSSG; and
- To communicate with and engage the voluntary sector in the VSI.

The Secretariat's structures, processes and products related to each of these roles are described in separate chapters of this report. As well, the report summarizes the Secretariat's work in support of the mandate and activities of four VSI working or reference groups: the Advocacy Working Group; the Working Group on Financing; the National Visible Minority Reference Group and the Aboriginal Reference Group.

Supporting Voluntary Sector Participation in Joint Tables

Mandate and Terms of Reference

This section of the report describes the Secretariat's activities in support of the first part of its mandate — specifically:

- To support the participation of voluntary sector members in the VSI through the joint tables, the sector-only working groups and the VSSG.

The terms of reference for the Secretariat outline its responsibilities in this area as:

- Supporting the sector's governance bodies for the VSI, the Voluntary Sector Roundtable and the sector's co-chairs and coordinators – both separately and as members of the VSSG;
- Supporting voluntary sector members serving on joint tables and working groups, and supporting the work of the joint tables and groups as a whole;
- Supporting the voluntary sector's engagement within the broad framework of the VSI, in a process of dialogue and continuous learning;
- Maintaining linkages and coordination across the joint tables on sector engagement processes;
- Providing consultation support and offering information clearinghouse and speakers' bureau services;
- Maintaining a register of interested parties across the country and drawing on this list for the work of the joint tables and working groups; and
- Serving as a contracting authority for expertise and services within the sector on behalf of joint tables and working groups.

Staff

Secretariat staff members were recruited from the voluntary sector following an open call for applicants. In fulfilling the Secretariat's mandate, staff members were called on to assume a variety of roles and responsibilities.

Secretariat staff provided liaison and advisory support to the voluntary sector members of the VSI joint tables. In three cases — the Joint Accord Table, the Capacity Joint Table

and the Joint Coordinating Committee — this support was provided directly, with financial resources to deliver services through the joint tables' secretariats. Over the Secretariat's mandate (June 2000–October 2002), a number of changes were made to the staff team: some members came on board when the Secretariat was first launched and remained for its duration; others were involved for shorter periods of time. To respond effectively to the Secretariat's myriad responsibilities in serving the various working groups and joint tables, many staff members played more than one role within the Secretariat.

Following is a list of Secretariat staff members, together with their titles, roles and, in some cases, approximate dates of service.

Members

Susan Carter
Executive Director, VSI Secretariat
(advisor to the Joint Coordinating Committee and the Joint Accord Table, and Secretary to the Voluntary Sector Steering Group)

Franklyn Harvey
Consultant to National Visible Minority Reference Group

Ellen Adelberg
Director of Communications and Liaison (Awareness Joint Table)
(November 2000 – December 2001)

Kate Humpage
Consultant to Joint Accord Table

Veena Balsawer
Document Manager (March–December 2002);
Website Manager (August–November 2002)

Marc Maracle
Consultant to Aboriginal Reference Group (March–October 2002)

Pat Baxter
Consultant to Aboriginal Reference Group (Summer 2001–January 2002)

Ryan McCarthy
Web Site Manager (February–August 2002)

Marilyn Box
Liaison with National Volunteerism Initiative Joint Table, Regulatory Joint Table and Information Management/Information Technology Joint Table, and Coordinator of Regional Communications Officers project

Deb Pike
Support to Financing Working Group; Consultant to Joint Accord Table (January–May 2002)

Brenda Cameron Couch

Member, Joint Capacity Table secretariat; support to the Voluntary Sector Steering Group (starting February 2002)

Lucy Charron

Office Manager

Michael Deraiche

Accord Project Assistant, Joint Accord Table secretariat (January-October 2002)

Havi Echenberg

Director of Engagement, Director of Communications, Liaison with Awareness Joint Table (August 2001–September 2002)

Gary Evans

Secretariat Officer, Joint Accord Table secretariat (starting August 2001)

Laurie Rektor

Support to Advocacy Working Group; Financial Officer, Operations Manager (starting February 2002)

Kathy Sinclair

Receptionist, Administrative Support (November 2000–May 2002)

Janet Sutherland

Director of Operations and support to the Voluntary Sector Steering Group (November 2000–February 2002)

Nadine Thériault

Communications and Logistics (starting September 2001)

Delaney Turner

Website Manager and Liaison with Awareness Joint Table (March 2001–January 2002)

Workplan, Products and Processes

The Secretariat's initial mandate coincided with the first phase of the VSI —June 2000 to October 2002. It was allocated a budget of \$2,700,000 to support its activities during this period.

One of the Secretariat's first tasks was to assist the Voluntary Sector Roundtable in developing and implementing a process for recruiting and selecting joint table members. The Roundtable appointed an Independent Selection Committee, made up of voluntary sector representatives from across the country, to establish selection criteria and guidelines for the process. A call for nominations to joint tables and working groups was issued widely through sub-sector and national voluntary organizations and resulted in more than 1000 nominations, from which the Selection Committee chose 65 voluntary sector joint table members. In September 2000, the Secretariat organized orientation sessions to familiarize the successful candidates with the VSI, its structures and processes.

The Secretariat's second major task was to create a body responsible for overseeing the VSI from the voluntary sector's perspective. The mandate of this group would be to look

beyond specific issues raised at the individual joint tables and working groups to the broader themes and concerns of the VSI. Although the Voluntary Sector Roundtable initially played this role, it was decided to expand the group to include other voluntary sector members with key roles in the VSI.

This oversight body (the Voluntary Sector Steering Group) was eventually refined to include all voluntary sector co-chairs of joint tables, the chairs of working groups, representatives of the VSI reference groups (for Aboriginals and visible minority groups), voluntary sector members of the Joint Coordinating Committee and members of the Voluntary Sector Roundtable. Over its two-and-a-half year mandate, the VSSG met more than 20 times, either in person or by telephone. During this time, it addressed a number of important issues concerning the voluntary sector's involvement in the VSI, including the best way for the sector to "endorse" the [*Accord Between the Government of Canada and the Voluntary Sector*](#) (the Accord).

At the outset, the VSSG received input and direction from a large group of organizations attending a Voluntary Sector Forum in September 2000. Two years later as phase one of the VSI drew to a close, the VSSG reported back to a Voluntary Sector Assembly of more than 200 participants. The VSSG also published a final report [*Building a Stronger Voluntary Sector: How the VSI is making a difference*](#), which was produced in the fall of 2002 and distributed widely throughout the voluntary sector.

Another of the Secretariat's early tasks was the development of several framework documents to guide sector members at the joint tables. These included papers on ethics, roles and accountabilities, and voluntary sector proposals for carrying out VSI-related programs and projects.

While most secretariats for the joint tables were located within government line departments, the secretariats to the Joint Coordinating Committee and the Joint Accord Table were housed jointly in the Voluntary Sector Task Force (within the Privy Council Office) and the Secretariat. Staff from the two secretariats provided substantive support to these groups, preparing for meetings (including developing agendas), producing status reports and briefing materials, recording and conveying discussion results and implementing decisions. This support extended well beyond the liaison role that secretariat staff played in relation to other joint tables. In a different model, staff support

A fundamental role

The Secretariat played a pivotal role in establishing the VSI's working groups and joint tables. Among its activities were:

- Recruiting and orienting voluntary sector members of joint tables and working groups, including developing an implementation process;
- Developing operational and ethical guidelines for all joint tables and working groups;
- Overseeing the creation of – and providing support to – the Voluntary Sector Steering Group; and
- Developing guidelines for use by all joint tables to encourage the hiring of voluntary sector organizations to carry out the work of the VSI.

for the Capacity Joint Table was provided jointly by Human Resources Development Canada and the Secretariat.

Beyond these specific secretariat functions, the Secretariat provided more general support to voluntary sector members of all working groups and joint tables, including:

- Monitoring and informing all joint table members about developments in the work of individual joint tables;
- Coordinating with government secretariat staff to develop materials and communicate with joint table members in preparation for and between meetings;
- Jointly convening and organizing “all-table” coordinating meetings of the secretariats for all joint tables and working groups;
- Preparing for all-table meetings (a total of three over the course of the first phase of the VSI);
- Preparing for consultations and other public events related to the joint tables’ work; and
- Identifying problems and opportunities for coordination and bringing these forward at meetings.

In addition, the Secretariat had the unique role of providing advice on such issues as how the work of the joint tables would impact on the voluntary sector and how the broader voluntary sector could be kept informed of and engaged in the joint tables’ work (see Chapter 2, Communication and Engagement). As well, the Secretariat was responsible for bringing specific voluntary sector interests or expertise to the attention of particular joint tables and advised individual joint tables on how other joint tables were grappling with similar issues.

As the following chapter demonstrates, the Secretariat also played an important role in consultations with the voluntary sector and in on-going communications efforts such as the VSI newsletter, *Update*, and website.

Lessons Learned

Secretariat staff learned a number of valuable lessons as a result of the joint table process, particularly with regard to policies and procedures across federal government departments and agencies. Some of these lessons concerned the federal government’s operations; others focused on the interaction between the two sectors.

- There is higher staff turnover in government than in the voluntary sector. As a result, Secretariat staff members were involved in an on-going “education” process with their government counterparts on the workings and idiosyncrasies of the voluntary sector.
- In general, government processes do not provide for flexibility, particularly with regard to allocating funding and changing funding arrangements.

- Funding arrangements differ from one department to another and within individual departments. These arrangements appear opaque and complex, particularly to those outside government. As a result, it was more difficult to be accountable to the sector as a whole for the conduct of the VSI.
- Officials within government, many of whom serve as volunteers themselves, have a real interest in the voluntary sector's work and how it relates to the work of their own departments.
- Both decision-making and implementation take longer in government than they do in the voluntary sector (we knew that, but it was brought home again and again during the VSI).
- In a crosscutting horizontal initiative such as the VSI, it is not always clear where the final decision-making authority within government lies.

Next Steps

Initially allocated to June 2002, funding for the Secretariat was redistributed to support its operation until October 2002. Interim funding is currently in place to support the Secretariat until March 2003. By that time, more formal decisions are expected about a new mechanism to undertake the follow-up processes required for the Accord and Codes of Good Practice, and to oversee implementation of the remaining VSI programs and policies. It is expected that a successor to the Secretariat will be created to support this work and that of the Voluntary Sector Forum (the Forum), the successor body to the VSSG. As the Forum will likely draw funds from a variety of sources, some of this funding may also support the next iteration of the Secretariat, particularly for work that is not specifically related to the VSI.

Outstanding Issues and Additional Work

As the Secretariat's mandate draws to a close, the following issues are outstanding and should be addressed by voluntary sector representatives serving on the advisory groups overseeing the next phase of work, as well as by the Forum.

- Implementation of the Codes of Good Practice and the Accord requires on-going dissemination of voluntary sector information materials and training on their use. Establishing a clearinghouse of information about good practices would also support successful implementation; this information could be added to, based on voluntary sector experiences in applying the Codes with government. Logically, this role would be played by the Secretariat's successor organization.
- The process for disseminating requests for proposals for the next stage of the VSI's work should include distribution to, and notification of, the voluntary sector.

- Centres and networks involved in knowledge dissemination under VSI programs need to be developed in partnership; the Secretariat's successor organization is the logical locus for voluntary sector participation in planning and implementing activities.
- Consideration must also be given to coordinating and overseeing the next phase of the VSI.

Communication and Engagement

Mandate and Terms of Reference

The second of the Secretariat's two mandated roles was to engage the voluntary sector in the VSI processes, and to inform the sector about the VSI's plans and progress. In addition to engaging the voluntary sector, activities supporting this role were designed to build on the opportunity provided by the VSI to increase the voluntary sector's sense of identity and cohesion.

The Secretariat's communications and consultation work was guided by a consultation and engagement framework entitled "From Kitchen Tables to Joint Tables," which was prepared by the Secretariat in the fall of 2000. This framework was adopted by the Joint Coordinating Committee in January 2001 to guide the progress of the VSI overall.

Staff

Secretariat staff members are listed on page 6, together with a description of their major roles.

Workplan, Products and Processes

The Secretariat's workplan for communication and engagement activities evolved continuously over the first two years of the VSI. From the outset, it was understood that the Secretariat would use a variety of vehicles and methods to reach out to the voluntary sector, and to inform and engage members about issues related to the VSI. These methods included: holding and facilitating engagement meetings across the country; developing and distributing a regular newsletter (*Update*); conducting consultations; maintaining a VSI website and a speakers' bureau; conducting mass mail-outs of information; organizing meetings of under-represented groups; and commissioning research.

Following is an overview of the Secretariat's key communications and consultation activities. All publications, including research reports, produced by the Secretariat are listed in Appendix B.

Research

The Secretariat commissioned a broad range of research, including studies on:

- Aboriginal involvement in the VSI and voluntary activity in Aboriginal communities;
- Voluntary sector presence in visible minority communities and visible minority participation in the mainstream voluntary sector community, including the VSI;
- The particular challenges facing small organizations in the voluntary sector; and
- Gender issues in the voluntary sector, in particular, the participation of women as volunteers and staff within the sector.

In addition, the Secretariat created a database of voluntary sector organizations including those expressing interest in or with previous involvement in the VSI, and those who were under represented in the VSI. This initiative began with the call for nominations to participate in the VSI process and was extended both regionally and centrally to capture those with an interest in voluntary sector issues. By the end of October 2002, the database contained more than 7,000 names.

Outreach, Consultation and Communication

A series of regional and local meetings helped to identify issues of concern to voluntary sector organizations in specific communities. Many of these meetings were held in conjunction with the Accord consultations during the spring of 2001. As well, three national outreach meetings were conducted: one with youth, one with Aboriginal voluntary sector leaders and one with visible minority organizations. The meetings with Aboriginal and visible minority representatives led to the creation of two reference groups (the National Visible Minority Reference Group and the Aboriginal Reference Group), each of which is discussed in a separate chapter of this report.

In recognition of the unique concerns of small organizations, the Secretariat commissioned focus group research in three Canadian communities: Peterborough, Ontario; Williams Lake, British Columbia; and Sydney, Nova Scotia.

Among the Secretariat's major projects were consultations designed to provide input and advice on a variety of key issues, which included:

- Cross-Canada consultations on the draft Accord and focus groups on the Code of Good Practice on Funding and the Code of Good Practice on Policy Dialogue
- Outreach sessions on the *Canada Corporations Act* review (in collaboration with Industry Canada);
- Focus groups on the work of the National Volunteerism Initiative in the fall of 2001; and
- Consultations on the work of the Joint Regulatory Table in the fall of 2002.

As well, the Secretariat directly managed "pooled" consultations in ten Canadian cities in February and March 2002. These consultations involved a number of joint tables and working groups, and public policy workshops. The Secretariat also provided

administrative and logistical support for nine outreach sessions hosted by the National Visible Minority Reference Group and for five information sessions organized by the Aboriginal Reference Group (for a complete list of consultation locations, dates and attendance, see Appendix C).

In the fall of 2001, the Joint Coordinating Committee agreed on the need to establish communications capacity “on the ground.” As a result, the Secretariat recruited part-time Regional Communications Officers in each province and territory (except Nunavut), to be based in local organizations and directed by the Secretariat. With funding provided by the Awareness Joint Table, from January to September 2002, the communications officers supported joint table and working group members in their outreach efforts, seeking out under represented groups, communicating widely about the work of the VSI, and soliciting the involvement of local communities in VSI activities. More specifically, they assisted by:

- Building on existing lists and networks (including coalitions) of voluntary sector organizations and people with a particular interest in the VSI;
- Customizing VSI presentations and materials for use by joint table members;
- Identifying and co-coordinating opportunities for speaking engagements by joint table members;
- Facilitating communications among VSI joint table members, other stakeholders and the Secretariat;
- Supporting Secretariat consultation activities, including the activities of host organizations identified for consultations; and
- Monitoring voluntary sector activity relevant to the VSI and activities of the voluntary sector more generally.

A list of regional communications officers is provided below:

Dennis Atchison
New Brunswick

Janet Lavoie
Alberta

Don Babey
Northwest Territories

Elizabeth MacDonald
Nova Scotia

Marlene Cairns
Prince Edward Island

Denise Proulx
Saskatchewan

Alison Ducharme
British Columbia

Ellen Rajzman
Ontario

Rebecca Fenton
Yukon

Susan Rowe
Newfoundland and Labrador

Leah Goodwin
Manitoba

Charlotte Thibault
Quebec

The Secretariat's communications activities also included:

- Extensive outreach to organizations hosting Accord-related consultations leading up to the Accord's launch in December 2001;
- Outreach on the Accord to voluntary sector organization newsletters from January to March 2002; and
- Reporting back to the sector at the end of the first phase of the VSI in a summary report entitled [Building a Stronger Voluntary Sector: How the VSI is Making a Difference](#).

In addition, the Secretariat supported the creation and operation of the VSI Speakers' Bureau, responding to requests by identifying speakers and preparing speaking notes and public information materials. As a result of the Bureau's work, speakers participated in more than 100 events, reaching over 17,000 people. In addition, the Secretariat coordinated VSI displays at conferences and other gatherings of voluntary sector and stakeholder groups, and prepared and maintained "standard" presentations on the VSI, which were tailored to meet the specific needs of particular speakers or audiences.

The Secretariat also developed, maintained and drew on a services registry of voluntary sector organizations and the firms that work closely with them. The registry was designed to assist the VSI, and to provide a service to others looking for suppliers of goods or services familiar with the voluntary sector. This registry was made available on the VSI website.

In addition to the communications projects described above, the Secretariat was responsible for developing and maintaining three main communications tools:

- *Update* (13 issues) – the newsletter was distributed to the Secretariat's mailing list, which was drawn from the database described above;
- The VSI website (www.vsi-isbc.ca), which included periodic "e-mail blasts" to those who had requested information about site updates; and
- The speakers' bureau and display materials.

With its counterparts in the Task Force, the Secretariat was closely involved in developing communications materials for the Accord consultations, developing messages and press materials for the Accord's December 2001 launch, and providing materials to organizations hosting Accord consultations to help encourage regional coverage of the Accord and the role these organizations played in its development. All news releases, speeches and other printed material produced for the VSI by the Task Force were vetted by the Secretariat and vice versa.

Linkages

Maintaining close links with joint tables and working groups was an essential element of the Secretariat's communications and engagement role. For communications purposes, this included on-going contact to:

- Update content on the website and prepare information on joint table and working group activities for the newsletter, *Update*;
- Prepare presentations on the VSI's plans and progress by voluntary sector joint table and working group members; and
- Prepare "[Building a Stronger Voluntary Sector](#)," the final report to the sector at the end of the first phase of the VSI.

This work was in addition to the secretariat support provided to the Joint Accord Table, the Joint Capacity Table, the Joint Coordinating Committee, the Advocacy Working Group, and the Working Group on Financing, as well as liaison activities with all other joint tables and collaborative mechanisms. Further linkages were created through all-table meetings of secretariats – these were organized by the Secretariat in collaboration with the Task Force.

In support of consultation activities, the Secretariat first contacted all joint tables and working groups to encourage ongoing consultation and communication, and to offer assistance in these areas. This work evolved into providing advice and guidance (as outlined above) and involving four joint tables and working groups in cross-Canada consultations during the spring of 2002 (Advocacy Working Group; Capacity Joint Table and its advisory group on the Canada Survey of Giving, Volunteering and Participating; and the Awareness Joint Table).

Dissemination, Delivery and Knowledge Transfer

In addition to the communications projects noted above, the Secretariat was involved in a variety of information dissemination and knowledge transfer activities. For example, in the fall of 2002 the Secretariat published a report (accompanied by a poster) highlighting some of the main achievements of the VSI. The report included a list of VSI products, as well as an overview of spending activity, both undertaken and planned. The report and posters were distributed together with the October 2002 issue of *Update*. Other distribution activities of note included:

- More than 70,000 brochures containing basic information about the VSI were distributed by the Secretariat from January 2001 to July 2002;
- More than 100 speaking engagements and 20 displays at community events (with a combined attendance of more than 17,000) were arranged through the Secretariat office; and
- Consultations organized by the Secretariat and joint tables or working groups directly involved some 6,000 participants.

Using a variety of dissemination means, including *Update*, the Secretariat arranged the distribution of:

- More than 10,000 copies of the draft Accord;
- 20,000 copies of the final Accord;
- 3,000 posters of the Accord; and
- 2,000 copies of the Codes of Good Practice.

In addition, the Accord was downloaded from the VSI website more than 6,000 times. In fact, the major method of knowledge dissemination and transfer was the joint VSI website, which had approximately 3,000 visitors per day (a total of over 136,000 visitors from January 2001 to July 2002). The most frequently requested materials from the website were requests for proposals, reports on the Canada Volunteerism Initiative, and the Accord and Codes of Good Practice. Although not used a great deal, the website also provided secure “extranet” space to allow each of the joint tables and working groups to disseminate materials internally.

The video produced by the Aboriginal Reference Group, entitled *It's Our Way*, is being disseminated by the group's successor, the National Aboriginal Voluntary Organization, with copies provided by the Awareness Joint Table. The video is available in both French and English.

Lessons Learned

In a truly joint process, all communications and consultation materials to be distributed externally were “signed off” by both government and voluntary sector representatives. With the exception of materials produced by the joint tables, this included all materials developed by the Secretariat and the Task Force, such as presentations, issues of *Update* and website materials. In retrospect, this joint approval process highlighted some important lessons:

- “Jointness” takes time and can delay the production and release of materials intended for the public.
- Over time and with experience, the “hot buttons” or sensitivities of each group are easier to predict.
- It isn't easy being a pioneer. As the VSI website was the first joint website involving the Government of Canada as a major partner, there were many “firsts” to be anticipated and resolved.
- The need to find common ground meant that messages were “softer” than what the voluntary sector would have produced on its own; the same is doubtless true for the federal government.
- As the VSI evolved, each party became more comfortable with the other speaking independently about the Initiative in different, but not contradictory, ways.

Next Steps

A number of communication and engagement tasks will be undertaken over the coming months, including disseminating reports, maintaining the website and publishing issues of *Update*. The Secretariat also needs to determine how and where its publications will be stored and from where they will be disseminated. These publications, along with an archived version of the VSI website, should be included in the records catalogue currently being prepared.

Outstanding Issues and Additional Work

The continued involvement of the more than 7,000 individuals and groups listed in the database is critical to maintaining and strengthening the relationships between government officials and voluntary sector leaders. It is also important to maintain the VSI website through to the end of the Initiative and to provide a publicly accessible archived version once the VSI has drawn to a close.

The Secretariat will work with the National Aboriginal Voluntary Organization (formerly the Aboriginal Reference Group) and the Department of Canadian Heritage to ensure the video is disseminated to voluntary organizations, Aboriginal organizations, and government departments.

The Advocacy Working Group

Mandate and Terms of Reference

As the VSI was being developed, it became clear that —from the voluntary sector’s perspective — the lack of a joint process for addressing the voluntary sector’s advocacy role was a significant gap in the VSI. In its call for nominations across the sector, the Voluntary Sector Roundtable recognized advocacy as a key issue for the voluntary sector and created the Advocacy Working Group (AWG) to ensure that it would be addressed as part of the VSI.

One of the VSI’s two sector-only working groups, the AWG was established and supported by voluntary sector resources. Its mandate was to:

- Ensure that advocacy is fully recognized and supported (both inside and outside the voluntary sector) as a valuable, legal and necessary component of the voluntary sector’s work; and
- Create the legal, financial and regulatory framework necessary to support the advocacy work of the voluntary sector, including a definition of “charity”.

Members

From among the 1000 nominations received, the Independent Selection Committee chose seven people to serve on the AWG. A list of members is provided below:

Megan Williams, Chair

Canadian Conference of the Arts
Ottawa

Claudette Lambert, (Resigned March 2002)

Fédération des femmes du Québec
Montreal

Laurie Beachell

Council of Canadians with Disabilities
Winnipeg

Esperanza Moreno

Canadian Council on International Cooperation
Ottawa

Charlotte Cochran, retired

Formerly of the Volunteer Resource Centre
Halifax

Sepp Tschierschwitz

Canadian Mental Health Association
Williams Lake

Julie Gelfand

Canadian Nature Federation
Ottawa

Advisor

Michael Baffoe

National Visible Minority Reference Group, Black Star Big Brothers
Montreal

Staff

The AWG was supported by Laurie Rektor of the Secretariat.

Workplan, Processes and Products

The AWG undertook a variety of activities designed to achieve its mandate, including research, consultation and collaboration with voluntary sector groups, and meetings and discussions with government officials and ministers.

Following is a brief overview of key items in its workplan. It should be noted that ongoing initiatives

Meetings

The Advocacy Working Group met a total of 10 times between November 2000 and March 2002 – specifically:

- November 22, 2000
- November 24, 2000
- February 1, 2001
- March 19, 2001
- April 25, 2001
- May 31, 2001
- September 13, 2001
- October 17, 2001
- January 18, 2002
- March 25–26, 2002

will be assumed by the Forum once the Secretariat's mandate concludes.

Conduct Background and Preliminary Research

(December 2001)

This work included: a workplan for the AWG; a summary of recent experiences in other jurisdictions; preliminary questions and projections on the impact of proposed changes; a review of the historical context for the current definition and understanding of "charity" and the role of voluntary sector advocacy in Canada (*Regulation of Advocacy in the Voluntary Sector – Current Challenges and Some Responses*, a research paper prepared by Betsy Harvie for the AWG).

Undertake Opinion Research on Advocacy

(Ongoing)

This work focused on the extent and limits of public support for advocacy activities by charitable organizations. It was gathered from various sources, including: a study by the Muttart Foundation entitled "Thinking about Charities"; the results of a public opinion survey solicited by the Awareness Joint Table; and input from VSI consultations and meetings.

Consult on the Definition of Charity and the Rules Governing Advocacy

(Winter 2002)

Consultations were held with selected voluntary sector organizations, government representatives and experts (including the Canadian Centre for Philanthropy on the definition of charity and the Institute for Media, Policy And Civil Society on advocacy issues). The AWG consulted with approximately 150 people during the VSI pooled consultations during the winter of 2002 in Toronto, Calgary, Halifax, Vancouver, Saskatoon, Winnipeg and St John's.

Develop an Opinion and a Concept Paper on Advocacy and the Definition of Charity

(Winter 2002)

Laurie Rektor prepared a paper for the AWG entitled [*Advocacy—The Sound of Citizens' Voices*](#), setting out the AWG's position on advocacy. Designed to generate feedback and discussion on the issue, the paper was used as the basic discussion tool in the AWG's campaign to enhance recognition of, and support for, advocacy.

Meet with Key Stakeholders and Partners

(2000-2002)

The AWG met with key individuals and organizations to discuss a strategy for effecting changes related to advocacy. These meetings included:

- Joint Regulatory Table on related issues/overlap in work areas
- Capacity Joint Table on policy capacity and advocacy
- National Visible Minority Reference Group, by invitation to serve as an advisor on the AWG

- Institute for Media, Policy And Civil Society on the charities and advocacy project (the AWG's chair and staff sat on the steering committee)
- Canadian Centre for Philanthropy on the definition of charity project; and
- Department of Finance, and Canada Customs and Revenue Agency: *ad hoc* group meeting on administrative approaches to recognizing advocacy under existing regulations.

Communicate Issues, Plans and Progress

The AWG undertook a number of activities designed to inform the voluntary sector and other key stakeholders about its work. Specifically, it communicated through:

- The VSI channels, e.g., website, *Update*, speakers bureau;
- AWG members and their networks;
- Meetings of VSI principals with the Ministers of Canadian Heritage and National Revenue and others; and
- Posting all final products on VSI website.

Make Final Recommendations

(Fall 2002)

Based on an analysis of its findings, the AWG issued a series of recommendations for action with respect to advocacy.

Monitor the Effects of Proposed Changes

(Ongoing)

Work is ongoing to provide a detailed analysis of the impacts (fiscal, legal and other) of recommended changes to the definition of charity and the rules governing advocacy. Some of this work has been undertaken in conjunction with the Joint Regulatory Table.

Lessons Learned

The experience of the AWG as a sector-only working group operating within the context of the broader VSI provided a unique opportunity for learning. Some reflections on the process and outcomes are provided below.

- A great deal of productive time was lost in efforts to have advocacy addressed as part of the joint table process. While this would have been ideal, the AWG's resources could have been put to better use by focusing on what the voluntary sector needed to move forward on the issue and building the voluntary sector's knowledge about, and support for, advocacy.
- The voluntary sector's demand for change in this area has increased substantially, likely as the result of the sector-only process.
- During the Voluntary Sector Assembly (October 6–7, 2002) and the all-table meeting of October 8, 2002, it was made clear that advocacy is a central issue that needs to be addressed by the federal government.

- The definition of charity is at the heart of the advocacy issue and needs to be put on the table for discussion.
- The Accord and Codes of Good Practice are useful tools to broaden understanding of, and support for, this issue.
- Adequate resources are needed to further address the issue of advocacy.

Next Steps

Tasks slated for completion over the coming weeks and months, include:

- Disseminate the consultation report;
- Disseminate copies of *Advocacy —The Sound of Citizens' Voices*;
- Finalize recommendations for future directions and report on them to the voluntary sector;
- Ensure that the issue of advocacy is brought forward to the Forum —pass along resources, recommendations and work completed to date;
- Develop a brief overview for organizations to use in pre-budget meetings and other discussions with federal government/committees; and
- Prepare a list of concrete actions that organizations can take to move the issue forward.

Outstanding Issues and Additional Work

A number of work tasks are outstanding; these should become a priority if continued progress is to be made on the issue of advocacy:

- Keep the issue alive in the voluntary sector, in government and with the general public by increasing awareness and understanding;
- Build a stronger consensus in the sector about how best to address the issue;
- Make advocacy a focus during the next federal election;
- Develop secure and significant sources of funding for advocacy within federal departments;
- Conduct research on the impacts of regulatory changes with respect to advocacy;
- Continue to participate in the charities and advocacy project (Institute for Media, Policy and Civil Society) and the work on defining charity (Canadian Centre for Philanthropy); and
- Continue to work with and engage government on the issue.

The Working Group on Financing

Mandate and Terms of Reference

As with the issue of advocacy, the lack of a joint process for addressing funding of the voluntary sector was viewed by the voluntary sector as a significant gap in the VSI. To ensure that funding was addressed as part of the VSI process, the Voluntary Sector

Roundtable identified it as a key issue in its call for nominations across the country, and created a sector-only working group to explore financing issues.

The Working Group on Financing (WGF) was established and supported by sector resources with a mandate to:

- Examine current voluntary sector financing practices and identify areas of concern; and
- Develop strategies for enhancing the sector's capacity, efficiencies and long-term sustainability.

Members

The Independent Selection Committee selected the following people to serve on the WGF from among the 1000 nominations received:

Susan Lewis, Chair

United Way
Winnipeg

Marcel Lauzière

Canadian Council on Social Development
Ottawa

David Boyd-Thomas

*University of British Columbia and
Vancouver General Hospital Foundation*
Vancouver

Daniel O'Grady

*Enbridge Inc. and Volunteer with
Volunteer Calgary*
Calgary

Bonnie Greene

United Church of Canada
Toronto

Susan Pigott

St. Christopher House
Toronto

Advisors

Lucie Rémillard

St. Justine Hospital Foundation
Montreal

Sylvan Williams

*National Visible Minority Reference Group
and Canadian Ethnocultural Council*
Ottawa

Resignations

Louise Arsenault

Fondation de l'hôpital Sainte-Justine
Montreal

Jean Yves Desbiens

Montminy, Bedard & Associes
Montreal

Staff

Staff members are listed on page 6.

Workplan, Products and Processes

The WGF's workplan included the following three components. It should be noted that the newly created Forum will pursue the ongoing work elements described below.

Component One: Explore issues and concerns of unique interest to the voluntary sector, by:

- Developing recommendations on best practices, funding models and support vehicles;
- Producing tools and resources on federal government funding policy development for use by the voluntary sector and its organizations; and
- Putting forward recommendations to ministers on issues and concerns, sector perspectives on federal funding, future capacity-building mechanisms and an approach to joint work.

Component Two: Working with the Capacity Joint Table's financial capacity sub-committee, examine the broad question of how the voluntary sector is financed. This work included:

- Investigating how the sector is currently financed (sources, mechanisms, trends) and exploring alternative models and mechanisms;
- Developing strategies and/or resources to enhance capacity related to long-term financial sustainability and stability;
- Identifying and developing tools to enhance financial management and accountability;
- Developing a plan of action for priority work areas based on identified issues affecting financial sustainability;
- Developing a strategic investment strategy and recommendations for implementation arising from the plan of action; and
- Making recommendations to the sector and the federal government on: sources and mechanisms of funding by sub-sector and their impact on sustainability; best practices, funding models, tools and resources; and effective financial management tools and resources.

Meetings:

The Working Group on Financing met a total of seven times during its mandate – specifically:

January 12, 2001

January 31, 2001

April 3, 2001

May 29, 2001

November 28, 2001

January 10–11, 2002

March 1, 2002

Component Three: Provide input as a reference group to the Treasury Board Secretariat's Federal Funding Study.

Projects

- Participation in the Think Tank Conference on Innovation in Financing, a strategic meeting of key individuals in the voluntary, government and private sectors (October 2001);
- Research on broader financing of the voluntary sector (ongoing);
- Research on tax-related issues (ongoing);
- Development of financial management and accountability resources (Fall 2001-ongoing);
- Participation in the development of the Code of Good Practice on Funding with the Joint Accord Table (January 2002–April 2002); and
- Support for organizational infrastructure in the voluntary sector (ongoing).

Research Papers

- Sources and Mechanisms of Funding and their Impact on Sustainability of Voluntary Sector Organizations in Canada: (Canadian Centre for Social Development, Coalition of National Voluntary Organizations);
- An Overview of Funding of the Voluntary Sector (October 2001, Lynn Eakin);
- Summary of Discussions: Think Tank (November 2001, Calgary Centre for Non-Profit Management);
- Supporting Organizational Infrastructure in the Voluntary Sector (May 2002, Lynn Eakin);
- Inventory of financial management and accountability tools and resources (Fall 2001, Warren Dow);
- Inventory of alternate financing models (April 2002, Warren Dow); and
- Setting the Agenda: Moving Forward on Financing (October 2002, Working Group on Financing).

Consultations

- As part of general VSI consultations (Spring 2001)
- Through VSI website survey on key issues (Summer 2002)
- In consultations with visible minority organizations (December 2001)
- As part of the Capacity Joint Table presentations in ten cities (Spring 2002)

Linkages

- Capacity Joint Table, on financial and policy capacity
- Treasury Board Secretariat Federal Funding Study, in its ongoing work
- Joint Accord Table, on the Code of Good Practice on Funding
- Information Management/Information Technology Joint Table, on supporting organizational infrastructure, portal, funding exchange
- Joint Regulatory Table, on related business
- Canada Customs and Revenue Agency, on shortened information form submitted by charities (T3010)
- Sector groups, through WGF members (Canadian Association of Gift Planners, Association of Fundraising Professionals, United Way, etc)
- National Visible Minority Reference Group member, through participation in an advisory capacity on the WGF

Communication

Communication with the voluntary sector occurred via the VSI website, *Update*, and consultation and outreach sessions. Members of the WGF conducted additional outreach and communication using their own networks.

Dissemination and Knowledge Transfer

Information and recommendations gathered by the WGF will be disseminated through existing VSI networks.

Lessons Learned

Following are some “after the fact” observations about the working group process:

- Some productive time was lost in the quest for “joint table” status. While working jointly on this issue may have been the ideal, the resources of the WGF may have been better used to work collaboratively within the VSI on issues related to financing and moving the issue forward within the voluntary sector.
- The process would have benefited from more cross reporting at meetings of working groups and joint tables. Scheduling more meetings simultaneously under one roof might have facilitated this. It would also have contributed to a greater sense of cohesion by encouraging social interaction among members of joint tables and working groups.
- More information was needed on how VSI funds were being spent, e.g., quarterly financial updates on how VSI money was being allocated to particular projects, how that money was being spent and how much remained. This may have helped address voluntary sector concerns regarding accountability and the Initiative’s overall viability.
- Greater effort should have been directed at engaging other levels of government on funding issues.
- The broad engagement of deputy ministers is necessary to ensure implementation of VSI deliverables.

Next Steps

A number of tasks will be completed over the coming months, including:

- Ensure that VSI work on key financing issues is communicated to the newly established Forum, including information about resources, work completed to date and recommendations for future activities;
- Disseminate the research report entitled [*Sources and Mechanisms of Funding and their Impact on Sustainability*](#), following its publication;

- Finalize and disseminate information about financial management and accountability resources;
- Share financing best practices and funding models in each province;
- Work collaboratively on the development and delivery of business cases on supporting organizational infrastructure (as recommended by the Information Management/Information Technology Joint Table); and
- Increase awareness about and disseminate widely throughout the sector the [Guide to Improving Funding Practices](#) and information on the [Strategic Investment Approach](#) developed as part of the funding study by Treasury Board Secretariat. In part, this goal will be accomplished through dissemination within the voluntary sector and government of the Code of Good Practice on Funding, which was developed as a tool to accompany the Accord.

Outstanding Issues and Additional Work

As the VSI moves forward, it will be important to continue activities designed to advance knowledge and awareness about financing issues. The following activities are recommended as priorities for the future—for the voluntary sector and for government:

For the Voluntary Sector

- Make joint deliberation and action on financing the sector a high priority for the remainder of the VSI;
- Convene meetings of representatives from all levels of government, public and private foundations, and private-sector funders to discuss the impact of current funding practices, including the urgent need for financial support for operational stability and capacity building, and to collectively determine the best approaches to meeting this need;
- Advocate for an impact analysis by the Office of the Auditor General—to be completed by 2004—to provide government and the voluntary sector with a clearer picture of how current funding practices affect the work of voluntary sector organizations receiving public funds;
- Undertake detailed case studies of the impact of the new accountability measures on voluntary sector organizations and share the results with the Office of the Auditor General and other key audiences;
- Make implementation of the Code of Good Practice on Funding a priority within the sector, by disseminating this code widely and developing the tools for implementing and expanding on the practices it describes;
- Establish the means by which voluntary sector organizations can evaluate government funding practices;
- Undertake, at an organizational level, steps to improve financial management and accountability practices, and the skills required to implement them;
- Develop and provide financial planning services to help voluntary sector organizations match their mission and goals to the most appropriate sources of funding and financing; and prepare a plan for financial sustainability; and
- Coordinate voluntary sector voices directed at government and other funders on issues related to sector financing.

For Government

- Put in place a time-limited, action-oriented task force with a mandate to explore new, creative financing instruments;
- Ensure that joint deliberation and action on financing the sector is a high priority for the remainder of the VSI;
- Take responsibility for appropriately funding and supporting the voluntary sector as service delivery agents for what were previously government services;
- Encourage individual and corporate financial support for voluntary organizations with tax measures that provide incentives to donors;
- Account for, and regularly report government financial contributions to the voluntary sector;
- Adopt consistent, manageable accountability requirements for funding processes;
- Designate a staff person within each department to act as a primary contact for voluntary organizations seeking or receiving funding from that department, and to clarify timing and expectations;
- Implement the *Strategic Investment Approach* (as developed by Treasury Board Secretariat) throughout government departments and agencies, and support its implementation through education and training;
- Find ways to provide non-restrictive, multi-year funding for voluntary sector organizations, allowing them the flexibility to allocate funds in a way that best meets their goals (the *Strategic Investment Approach* is an important step in achieving this goal);
- Dedicate resources to implementing the Code of Good Practice on Funding, including resources for its dissemination and for training appropriate officials in ways to enhance the funding relationship with the voluntary sector; and
- Review existing legislation with respect to related business activity by voluntary sector organizations to make it better reflect the contemporary realities faced by voluntary and charitable organizations, and to create an environment that is receptive to social entrepreneurship.

The National Visible Minority Reference Group

Mandate and Terms of Reference

The National Visible Minority Reference Group (NVMRG) was established following a May 2001 meeting of national visible minority organizations to discuss the VSI and their participation in the Initiative. The mandate of the this reference group was to:

- Be an influential voice in shaping perspectives, policies and program initiatives at national, provincial and local levels;
- Serve as a clearinghouse of relevant information;
- Build and strengthen local and regional networks, and a national network based on a strong foundation of local organizations; and
- Access and develop resources, particularly funding, for the enhanced effectiveness and sustainability of visible minority organizations.

Much of this reference group's decision-making was carried out by an executive working group chaired by Sylvan Williams, with Fred Pryce serving as treasurer. This working group carried out day-to-day administration activities on behalf of the NVMRG and the working group, and liaised with the Secretariat. Other working group members were John Asfour, Michael Baffoe, Wilma Findlay, Khadija Haffajee, Munir Jan, Sam Laldin and Sandy Onyalo. Nadine Thériault and Franklyn Harvey provided administrative and consulting support, respectively.

Members

The NVMRG was composed of representatives from twenty-one organizations representing visible minority groups. A list of members is provided below:

Sylvan Williams, Chair

Canadian Ethnocultural Council
Ottawa

Munir Jan

REH'MA Foundation
Don Mills

John Asfour

Canadian Arab Federation
Montreal

Maria Omene

Saskatchewan Visible Minority Employees Association
Regina

Michael Baffoe

Black Star Big Brothers Inc.
Montreal

Samuel Laldin

Christian Cultural Association of South Asians
Kingston

Clarence S. Bayne

National Council of Black Educators of Canada (NCBEC)
Montreal

Nalikando Njekwa Nachilobe

Saskatoon Open Door Society
Saskatoon

Pauline Byard

The African Canadian Employment Clinic
Montreal

Fo Niemi

Centre for Research Action on Race Relations (CRARR)
Montreal

Salvador B. Cabugao

National Council of Canadian Filipino Associations
Montreal

Fred Pryce

National Council of Jamaicans and Supportive Organizations in Canada
Ottawa

Nalda Callender

National Congress of Black Women and Representative from the Vancouver Visible Minority Connection
Burnaby

Sandy Onyalo

National Dialogue Committee of African Canadians
Ottawa

Emmanuel J. Dick
*National Council of Trinidad and Tobago
Organizations in Canada*
Toronto

June A. Rampersad
Citizenship Council of Manitoba
Winnipeg

Debbie Douglas
*Ontario Council of Agencies Serving
Immigrants (OCASI)*
Toronto

Sushila Samy
*National Organization of Immigrant and
Visible Minority Women of Canada*
Ottawa

Wilma Findlay
*National Council of Visible Minorities in
the Federal Public Service*
Gatineau

Teresa Woo Paw
Ethno-cultural Council of Calgary
Calgary

Khadija Haffajee
*Islamic Society of North America,
Canadian Section*
Ottawa

Baljinder Gill
*National Association of Canadians of
Origins in India*

Anu Bose
*National Organization of Immigrant and
Visible Minority Women*

Elvira Sanchez De-Malicki
Canadian Hispanic Congress

Fleurette Osborne
Congress of Black Women

Hanny Hassan
Council of Muslim Community of Canada

Staff

Staff members are listed on page 6.

Workplan, Products and Processes

The key elements of the NVMRG's workplan were to:

- Respond to VSI documents and propose changes where necessary
- Inform local organizations about the VSI and involve them in the process
- Be represented on the various structures of the VSI (i.e., the joint tables and working groups, and the VSSG)
- Submit a project proposal to various departments for policy research
- Produce research on visible minorities in the voluntary sector

Meetings

The National Visible Minority Reference Group met four times during the first phase of the VSI:

- May 17, 2001
- October 14–15, 2001
- March 18, 2002
- June 10–11, 2002

Research

As part of its work, the NVMRG produced the following major research products:

- [*Research Project on Visible Minority Communities in Canada*, by Chandra Budhu \(November 15, 2001\)](#)
- [*Fundraising Strategy for the Visible Minority Reference Group of the Voluntary Sector Initiative*, by Pawan Varma \(June 10, 2002\)](#)

Projects

A project proposal for the VSI's Sectoral Involvement in Departmental Policy Development program was developed by the NVMRG and approved for funding through the Solicitor General's Office. The National Organization of Immigrant Visible Minority Women of Canada is the lead organization for the project, which focuses on building policy capacity within the visible minority community and the Solicitor General's Office in three priority areas: restorative justice, youth and crime prevention, and effective corrections.

Linkages

The NVMRG established important linkages through its participation on VSI working groups and joint tables:

- Sylvan Williams, VSI Working Group on Financing, Accord Working Group on Funding (Code of Good Practice)
- Michael Baffoe, Advocacy Working Group
- Wilma Findlay, Accord Working Group on Policy (Code of Good Practice)
- Khadija Haffajee, Accord Working Group on Structures
- Anu Bose, Voluntary Sector Steering Group (December 2001 to May 2002)
- Sandy Onyalo, Voluntary Sector Steering Group (from May 2002)
- Sylvan Williams, Canada Volunteerism Initiative Design Advisory Group

Consultations

Nine visible minority community outreach sessions were held in the fall of 2001 and winter of 2002. Local organizations hosted these consultations in Toronto, London, Montreal, Halifax, Ottawa, Saskatoon, Vancouver, Winnipeg and Calgary.

Communications

The working group ensured that all pertinent information was distributed to NVMRG members, advocated for visible minority representation across the VSI and conducted outreach to increase the attendance of visible minorities at city-based consultations across the country. The participation of the NVMRG in the VSI has helped to integrate the concerns of the visible minority community into the voluntary sector's agenda.

Lessons Learned

Following is an overview of lessons learned as a result of the reference group process:

- It was initially challenging to integrate the concerns of visible minority groups into the VSI process. However, by organizing a reference group and pursuing other opportunities for involvement, visible minority groups were ultimately successful in having their voices heard and involving organizations across the country in consultations about the VSI.
- The principles underpinning the VSI should be put into practice in all facets of its operation, including its structure, process and practice.
- It is important to identify the diverse “voices” within the sector that should be involved in the process.
- Adequate human and financial resources are important to ensure diverse and representative participation of the voluntary sector community.

Next Steps

After October 2002, the working group will continue to develop independently of the VSI. Following are some suggested focus areas for its work:

- *Voice, influence and presence*: give visible minorities a strong voice and presence by creating and operating a volunteer policy group and ensuring effective involvement in post-VSI forums.
- *Information and communication*: develop communication channels and databases of information, as well as a national newsletter and a website connecting visible minority organizations across Canada.
- *Networks and organizational capacity*: build a national network and expand the NVMRG, and initiate networks at regional and local levels.
- *Research*: conduct research to identify program activity needs.
- *Resource mobilization and development*: develop a long-term funding strategy.

Outstanding Issues and Additional Work

It is recommended that the following be considered as priorities for further work:

- Return program funding and developmental resources to visible minority organizations;
- Include visible minority organizations and leaders in policy making;
- Support the creation of a national mechanism for visible minority communities;
- Support the development of directories and websites of visible minority voluntary organizations at national, provincial and municipal levels;
- Take action on past recommendations; and
- Put visible minorities and their issues into the mainstream of Canadian society.

The Aboriginal Reference Group

Mandate and Terms of Reference

The mandate of the Aboriginal Reference Group (ARG) was to act as an advisory body to the VSI, providing input, direction and recommendations from an Aboriginal perspective.

Established in July 2001, the ARG was a coalition of approximately 20 Aboriginal people who were selected based on their expertise in voluntary sector issues and their experience working with Aboriginal people. Although its members did not represent any specific Aboriginal organization, the ARG was reflective of Aboriginal peoples in Canada (First Nations, Inuit and Métis) from a range of urban, rural, on-reserve and northern locations across the country.

As set out in the terms of reference, members were to be replaced only through a nomination process determined by the ARG. Members were accountable to the Aboriginal community at large and reported to the VSI as required.

Members

Wanda Big Canoe
Ontario

Edward Lavallee
Alberta

Lou Demerais
British Columbia

Cece McCauley
Northwest Territories

Millie Evalik
Nunavut

Cheryl Mclean
Yukon Territories

Dan George
British Columbia

Dale Montour
Quebec

Kim Ghostkeeper
Alberta

George Munroe
Manitoba

Wayne Helgason
Manitoba

Nellie Power
Newfoundland

Joe Hester
Ontario

Ron Rivard
Saskatchewan

Vince Hill
Ontario

Doreen Saulis
New Brunswick

Damon Johnston
Manitoba

Paul Skanks
Ontario

Betty Kennedy
Ontario

Cecelia Thomas
British Columbia

Staff

A list of staff is provided on page 6.

Workplan, Products and Processes

Communications

Key elements of the workplan were to:

- Rework the VSI material (e.g., presentation decks on the VSI, the Accord and the ARG) into plain language geared for the Aboriginal community – much of this work was undertaken by the VSI Secretariat, with input from the ARG;
- Inform VSI joint tables, as well as others participating in the Initiative, about Aboriginal customs and culture in the voluntary sector;
- Produce a short video on voluntary activity in the Aboriginal community (see below); and
- Recruit individuals to communicate information about the VSI in Aboriginal languages.

One of the ARG's major outputs was a short video, entitled *It's Our Way*. Funding by the Awareness Joint Table, the video highlights the Aboriginal peoples' unique cultural approach to voluntary activity, and its traditional and contemporary application in the Aboriginal community. The National Aboriginal Voluntary Organization, a successor organization to the ARG, is expected to disseminate the video within Aboriginal communities.

Integration Into Existing VSI Structures

The ARG's workplan set out the following elements aimed at integrating Aboriginal concerns into the overall VSI:

- Nominate Aboriginal participants from the ARG to relevant VSI working groups and joint tables; and
- Inform and encourage the involvement of other Aboriginal individuals, groups and organizations on VSI joint tables, meetings, events, etc.

Research and Development

The workplan called for the ARG to:

- Document the Aboriginal definition of voluntary activity;

- Define what volunteer means to Aboriginal people;
- Document the benefits the VSI will have for Aboriginal people in Canada;
- Conduct further research on best approaches to engage the Aboriginal community on the VSI; and
- Determine the long-term commitment to the voluntary sector and how will it impact on Aboriginal communities.

The ARG's capacity to conduct formal research about Aboriginal activity in the voluntary sector was limited by available resources and its relatively brief involvement in the VSI process. However, production of the video, and input and feedback from participants in the Aboriginal community information sessions demonstrated some unique perspectives. These activities also highlighted the need for additional information, and continued education and awareness efforts concerning Aboriginal participation in the voluntary sector. A number of specific areas for further work were identified by the ARG (see *Next steps*, below).

The ARG has now been incorporated into a formal national organization (the National Aboriginal Voluntary Organization) with a focus on Aboriginal issues as they pertain to the voluntary sector. One of its functions will be to serve as a clearinghouse for information on these issues.

Linkages

A number of ARG members participated on VSI joint tables and working groups:

- Wayne Helgason, Joint Accord Table, Accord Working Group on Policy
- Doreen Saulis, Voluntary Sector Steering Group
- Ron Rivard, Accord Working Group on Funding
- George Munroe, Accord Working Group on Structures and Processes
- Damon Johnston, Accord Working Group on Policy, Voluntary Sector Steering Group

Consultation

The ARG oversaw the development and implementation of an Aboriginal-led consultation process. Local Aboriginal organizations hosted four Aboriginal community information sessions in the winter and spring of 2002, with consultations in Saskatoon, Halifax, Winnipeg and Edmonton.

Communication

The ARG assisted the Secretariat in developing plain-language materials on the VSI that were geared towards the Aboriginal community. This material took the form of presentation decks that were made available to members of the broader VSI and were used by ARG members in the Aboriginal community information sessions.

Dissemination, Delivery and Knowledge Transfer

The ARG's successor —the National Aboriginal Voluntary Organization — is seeking resources to sustain its operations. One of its tasks will be to disseminate the *It's Our Way* video among Aboriginal communities.

Lessons Learned

The experience of the ARG provides a valuable learning opportunity for future initiatives. Among the key lessons learned are:

- Ensure inclusive processes — to have a voice in the VSI, the Aboriginal voluntary sector community must stand up and participate;
- Communicate clearly and concisely with the Aboriginal community and devote adequate time to ensuring that messages are delivered and received;
- Set out a clear definition of volunteering from an Aboriginal perspective;
- Provide adequate resources and timeframes to ensure the successful delivery of events and products; and
- Make the process accountable to the community.

Next Steps

Looking to the future, a number of initiatives are either planned or under way, including:

- Develop a series of funding proposals to Canadian Heritage and the Canada Volunteerism Initiative for sustaining funds, research funding and pilot projects;
- Draft letters to the VSI (and others) advising of the formation of the National Aboriginal Voluntary Association;
- Develop a resource list of Aboriginal voluntary organizations in Canada;
- Disseminate and promote the use of the Aboriginal volunteer activity video by
 - developing a strategic plan for disseminating the video;
 - drafting a letter to the Secretariat regarding “ownership” of the video;
 - considering cost recovery options for producing additional copies of the video.
- Develop a profile describing the ARG’s creation, current mandate, objectives and achievements to-date, and providing brief biographies of each member; and
- Develop a protocol arrangement with the Coalition of National Voluntary Organizations.

Relevant Documents List

Accord Between the Government of Canada and the Voluntary Sector
http://www.vsi-isbc.ca/eng/relationship/order_tools.cfm

Building a Stronger Voluntary Sector: How the VSI is making a difference
<http://www.vsi-isbc.ca/eng/about/pdf/building.pdf>

Advocacy —The Sound of Citizens' Voices
http://www.vsi-isbc.ca/eng/policy/pdf/position_paper.pdf

Sources and Mechanisms of Funding and their Impact on Sustainability
http://www.vsi-isbc.ca/eng/funding/funding_mechanisms.cfm

Guide to Improving Funding Practices
http://www.vsi-isbc.ca/eng/funding/pdf/guide_eng.pdf

Strategic Investment Approach
http://www.vsi-isbc.ca/eng/funding/pdf/sia_eng.pdf

Research Project on Visible Minority Communities in Canada
http://www.vsi-isbc.ca/eng/about/vis_min_research.cfm

Fundraising Strategy for the Visible Minority Reference Group of the Voluntary Sector Initiative, by Pawan Varma (June 10, 2002)

Appendix A - Voluntary Sector Steering Group Members

The following list reflects members' names and titles as of November 27, 2002:

Marlene Deboisbriand, Chair
Chief Operating Officer and Senior Vice
President
United Way of Canada-Centraide Canada

Don McCreesh
Chair, YMCA of Greater Toronto
Sr. Vice-President, Corporate Human
Resources, Celestica Inc.

Paddy Bowen
Executive Director
Volunteer Canada

Esperanza Moreno
Deputy Director
Canadian Council for International
Cooperation

Colleen Ford
Executive Director
Canadian Parks and Recreation Association

Ann Mowatt
Past Chair, NVO
Senior Policy Advisor to the ADM, Income
Security Program
Human Resources Development Canada

Bonnie Greene
Representative of the Faith Communities
Program Director, Division of Mission in
Canada
United Church of Canada

Sandy Onyalo
National Dialogue Committee of African
Canadians
C/o Ottawa Rape Crisis Centre

Al Hatton
President
United Way – Centraide Canada

Martha Parker
Executive Director
Volunteer Calgary

Patrick Johnston
President & CEO
Walter and Duncan Gordon Foundation

Monica Patten
President and CEO
Community Foundations of Canada

Damon Johnston
Representative of the Aboriginal Reference
Group
Chair, Centre for Aboriginal Human
Resources Development

Lucie Rémillard
President & Executive Director
Fondation de l'Hôpital Sainte-Justine

Sol Kasimer
Representative of National Health Charities
CEO, Altruvest

Penelope Rowe
Chief Executive Officer
Community Services Council,
Newfoundland & Labrador

Colleen Kelly

Lynne Toupin

Executive Director
Volunteer Vancouver

Victor Lachance
President and CEO
Canadian Centre for Ethics in Sport

Marcel Lauzière
Executive Director
Canadian Council on Social Development

Suzanne Lawson
National Executive Director
Amyotrophic Lateral Sclerosis Society of
Canada

Susan Lewis
President
United Way Winnipeg

Director
Human Resources Support Services
Community Foundations of Canada

Michael Weil
Chief Executive Officer
YMCA Canada

Megan Williams
National Director
Canadian Conference of the Arts

Bob Wyatt
Executive Director
The Muttart Foundation

Appendix B - Publications

Print copies of all documents are available from the Secretariat on request. Many of the following documents are also available on the VSI website at www.vsi-isbc.ca.

Document Name	Type of Document	Location
1. Supporting voluntary sector participation in Joint Tables		
Minutes of the VSSG meetings: <ul style="list-style-type: none"> ▪ November 23, 2000 ▪ February 21, 2001 ▪ April 10, 2001 ▪ May 29, 2001 ▪ June 14, 2001 ▪ August 7 – 8, 2001 retreat ▪ September 7, 2001 ▪ September 20, 2001 ▪ October 5, 2001 ▪ October 29, 2001 ▪ November 2, 2001 ▪ November 16, 2001 ▪ December 4, 2001 ▪ December 11, 2001 ▪ January 30, 2002 ▪ February 12, 2002 agc ▪ March 18, 2002 ▪ April 24, 2002 ▪ May 14, 2002 ▪ June 19, 2002 ▪ September 12, 2002 		Secretariat
Voluntary Sector Members' Roles, Responsibilities and Accountabilities		Secretariat
Voluntary Sector Members' Ethical Guidelines		Secretariat

Document Name	Type of Document	Location
Partnering for the Benefit of Canadians: Government of Canada – Voluntary Sector Initiative Undertakings		Secretariat
Building a Stronger Voluntary Sector: How the VSI is Making a Difference	A report to the sector by the VSSG, Fall 2002	Secretariat/ www.vsi-isbc.ca / www.voluntary-sector.ca
Voluntary Sector Governance and Leadership: Moving Forward	A discussion paper for the VSSG prepared by Susan Phillips	Secretariat
2. Communication and Engagement		
From Kitchen Tables to Joint Tables: A Joint Consultation and Engagement Framework for the Voluntary Sector Initiative		Secretariat
Joint Communications, Consultation and Engagement Framework		Secretariat
Motivation at the Margins: Gender Issues in the Canadian Voluntary Sector	A research report prepared by Louise Mailloux, Heather Horak and Colette Godin	Secretariat
Caught in the Middle: What small, non-profit organizations need to survive and flourish	A research report prepared by Linda Roberts	Secretariat/ www.voluntary-sector.ca
From Choirs to Conservation Groups: Small, Community-based organizations are the largest part of the voluntary sector	A discussion paper prepared by Linda J. Roberts	Secretariat
Partnering for the Benefit of Canadians	Brochure about the VSI	Secretariat
Backgrounder on the Voluntary Sector Initiative	April 2001	Secretariat

Document Name	Type of Document	Location
<i>Update:</i> <ul style="list-style-type: none"> ▪ No. 1 March 2001 ▪ No. 2 May 2001 ▪ No. 3 June 2001 ▪ No. 4 July 2001 ▪ No. 5 September 2001 ▪ No. 6 October 2001 ▪ No. 7 December 2001 ▪ No. 8 December 2001 ▪ No. 9 February 2002 ▪ No. 10 March 2002 ▪ No. 11 June 2002 ▪ No. 12 October 2002 	Newsletter	Secretariat
Small Organizations Focus Group Reports: <ul style="list-style-type: none"> ▪ Williams Lake (November 29, 2001) ▪ Sydney (December 4, 2001) ▪ Peterborough (December 7, 2001) 		Secretariat
Pooled Consultation Final Reports: <ul style="list-style-type: none"> ▪ Toronto (February 5, 2002) ▪ Saint John (February 19, 2002) ▪ Halifax (February 21, 2002) ▪ St. John's (February 26, 2002) ▪ Calgary (March 6/7, 2002) ▪ Saskatoon (March 11/12, 2002) ▪ Winnipeg (March 13/14, 2002) 		Secretariat

Document Name	Type of Document	Location
3. Advocacy Working Group		
Record of Meetings: <ul style="list-style-type: none"> ▪ November 22, 2000 ▪ November 24, 2000 ▪ February 1, 2001 ▪ March 19, 2001 ▪ April 25, 2001 ▪ May 31, 2001 ▪ September 13, 2001 ▪ October 17, 2001 ▪ January 18, 2002 ▪ March 25 & 26, 2002 		Secretariat
Report to Participants on Winter 2002 Consultations on Advocacy – the Sound of Citizens’ Voices		Secretariat/www.vsi-isbc.ca
Advocacy – The Sound of Citizens’ Voices	position paper for the Advocacy Working Group by: Laurie Rektor	Secretariat/www.vsi-isbc.ca
Regulation of Advocacy in the Voluntary Sector: Current Challenges and Some Responses	research paper by: Betsy A. Harvie	Secretariat/www.vsi-isbc.ca
4. Working Group on Financing		
Record of Meetings: <ul style="list-style-type: none"> ▪ January 12, 2001 ▪ January 31, 2001 ▪ April 3, 2001 ▪ May 29, 2001 ▪ November 28, 2001 ▪ January 10 & 11, 2002 ▪ March 1, 2002 		Secretariat
Setting the Agenda: Moving Forward on Financing	report by the Working Group on Financing Oct 2002	Secretariat/www.vsi-isbc.ca
An Overview of the Funding of Canada's Voluntary Sector	report by Lynn Eakin	Secretariat/www.vsi-isbc.ca
Supporting Organizational Infrastructure in the Voluntary Sector	report by Lynn Eakin	Secretariat/www.vsi-isbc.ca

Document Name	Type of Document	Location
5. National Visible Minority Reference Group		
Minutes: <ul style="list-style-type: none"> ▪ May 17, 2001 ▪ October 14 and 15, 2001 ▪ March 18, 2002 ▪ June 10 & 11, 2002 		Secretariat
Consultation Reports: <ul style="list-style-type: none"> ▪ Montreal (October 11, 2001) ▪ Toronto (October 12, 2001) ▪ Halifax (November 9, 2001) ▪ London (November 23, 2001) ▪ Ottawa (December 1, 2001) ▪ Calgary(March 6-7, 2002) ▪ Saskatoon (March 11-12, 2002) ▪ Winnipeg (March 13-14, 2002) ▪ Vancouver (March 14, 2002) 		Secretariat
Research Project on Visible Minority Communities in Canada	research paper by Chandra Budhu	Secretariat/www.vsi-isbc.ca
6. Aboriginal Reference Group		
Minutes: <ul style="list-style-type: none"> ▪ September 29-30, 2001 ▪ November 15, 2001 ▪ January 29 - 30, 2002 ▪ June 9 – 10, 2002 		Secretariat
Aboriginal Information Sharing and Gathering Sessions on the VSI – Final Report	report by Marc Maracle	Secretariat
Reports of the Aboriginal Information Sharing and Gathering Sessions on the VSI: <ul style="list-style-type: none"> ▪ Saskatoon March 28, 2002 ▪ Winnipeg April 18, 2002 ▪ Edmonton May 9, 2002 		Secretariat
<i>It's Our Way</i>	Aboriginal Volunteer Activity Video produced by Chikâk Communications	Secretariat

Appendix C – Aboriginal Reference Groups Consultations

Consultations and Events Organized by the Secretariat

(Note: the following list does not include consultations undertaken by any of the joint tables.)

A. Small Organizations (Fall 2001)

- 3 sessions
- 40 participants

Place/ Date	Host Organization	No. of Participants
Williams Lake, British Columbia November 29, 2001	Williams Lake & District Volunteer Center and the Social Planning Advisory Network (SPAN)	18
Sydney, Nova Scotia December 4, 2001	Every Woman's Centre	10
Peterborough, Ontario December 7, 2001	Peterborough Social Planning Council	12

B. Visible Minority Organizations (Fall 2001/Winter 2002)

- 9 sessions
- 389 participants

Place/ Date	Host Organization	No. of participants
Montreal, Quebec October 11, 2001	Centre de Recherche-Action sur les Relations Raciales (CRARR)	50
Toronto, Ontario October 12, 2001	Ontario Council of Agencies Serving Immigrants (OCASI)	70
Halifax, Nova Scotia October 17, 2001	African Canadian Employment Clinic	10
London, Ontario November 23, 2001	London Urban Services Organization (LUSO)	88
Ottawa, Ontario December 1, 2001	National Organization of Immigrant and Visible Minority Women (NOIVMC)	55
Saskatoon, Saskatchewan March 11&12, 2002	African Women's Circle Inc.	56
Winnipeg, Manitoba	Citizenship Council of Manitoba	30

March 13&14, 2002		
Vancouver, British Columbia March 14	Affiliation of Multicultural Societies & Service Agencies (AMSSA)	30

C. Aboriginal Information Sharing and Gathering Sessions (Winter/Spring 2002)

- 4 sessions
- 215 participants

Place/ Date	Host Organization	No. of participants
Halifax, Nova Scotia March 22, 2002	Mi'kmaq Friendship Center	50
Winnipeg, Manitoba March 27, 2002	Social Planning Council of Winnipeg	100
Saskatoon, Saskatchewan March 28, 2002	Western Region Métis Women Association Inc.	50
Edmonton, Alberta May 9, 2002	Institute for the Advancement of Aboriginal Women	15

D. Pooled Consultations (February – March 2002)

- 9 sessions
- 530 participants

Place/ Date	Host Organization	No. of participants
Toronto, Ontario Feb. 5, 2002	United Way Greater Toronto	90
Saint John, New Brunswick Feb. 19, 2002	Human Development Council	25
Halifax, Nova Scotia Feb. 21, 2002	United Way Halifax	90
St. John's, NF Feb. 26, 2002	Community Services Council	97
Charlottetown, PEI Feb. 28, 2002	PEI Council of the Disabled	15
Calgary, AB March 6/7, 2002	Volunteer Calgary	105

Saskatoon, SK March 11/12, 2002	United Way of Saskatoon	70
Winnipeg, MB March 13/14, 2002	Manitoba Voluntary Sector Initiative	23
Vancouver, BC March 20/21, 2002	<i>YWCA of Vancouver</i>	15

E. Forum 2000 (September 17, 2000, Ottawa, Congress Centre)

- 200 participants

F. Assembly 2002 (October 6th and 7th, 2002, Ottawa, National Conference Centre)

- 207 participants