# SOCIAL INNOVATION

## Learners Guide

BOW VALLEY COLLEGE

# Social Innovation Module

# Learners Guide

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For more information about the research and this resource please contact:

appliedresearch@bowvalleycollege.ca

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Conseil de recherches en sciences humaines du Canada

Canada

# Social Innovation Learners Guide

## How to use this module?

It is suggested that you read the introduction to each unit, and follow the assigned order of activities. Unit introductions will give you a connection to "where you have been" and an overview of "where you are going".

The sections below outline the major content areas of each unit. It is estimated that the entire module (all three units of content) will take **15 hours** to complete. The usage of these modules is flexible for independent learning and classroom learning therefore the actual time to complete is dependent on the facilitator, or learner.

*Note:*

*Responses in D2L will not be saved. If you would like a record of your responses to questions or activities, please ensure you download the PDF and save your responses.*

## Sections:

### Learning Activities

Learning activities are not graded or marked for credit; however, they are integral pieces of each unit in engaging topics, and provide as a platform for the use of provided tools and resources you will use in the module and beyond.

### Questions for Consideration

Each learning activity will conclude with "Questions for Consideration". These questions are available to summarize what you have learned. Questions for consideration are not submitted for evaluation, rather, they are to be engaged by you, the learner, to ensure you are considering the key pieces of the activity.

### Learning Checklist

This tool provides you with key items to check your skill development and learning in relation to the topics of a unit. If you are comfortable checking off each item in the list, congratulations, you are ready to proceed to the next topic.

### Supplementary Resources

If you find a topic interesting and want to explore it further, you can access a variety of informative and more advanced supplemental resources at the end of each unit.

The supplementary material consists of external links that can be used for further learning or interest. Care has been taken to provide links that likely will be long lasting, however, Bow Valley College is not responsible for maintaining these links.

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## Questions for Consideration Answer Guide

The following answer guide is provided for those working through the module material on their own to get feedback on the questions for consideration. Often the questions in each unit are used to provoke individual and personalized thought around the material, and thus there are many ways to answer the question, but this will guide you in the right direction.

## Additional Resources

Note: As the Social Innovation Module is supplementary instructors may or may not adopt these performance evaluation options. However, the content can provide more opportunity to engage with the material.

## Unit Reflection

The unit reflection is intended to serve as a tool for reflection. Effective social innovation is rooted in reflection, as such, it is important to take inventory of key learnings throughout the unit to build a strong foundational understanding of what constitutes effective social innovation. A clear articulation of key learnings as related to the unit

- Demonstrated growth through reflection of unit materials
- Ability to demonstrate how each unit's material builds upon each other creating a larger whole.

## Discussion

There will be a recommended discussion post at the end of each unit, for a total of 3 discussion posts. You will post a response to the question or prompt provided by your instructor for each unit. Discussion posts should be original contributions, meaning you are providing your own ideas and insights on the posed topic. Additional contributions to the learning community in the form of peer responses should be value added i.e., building upon an idea or insight provided by a classmate, asking a question, or drawing a connection to module material.

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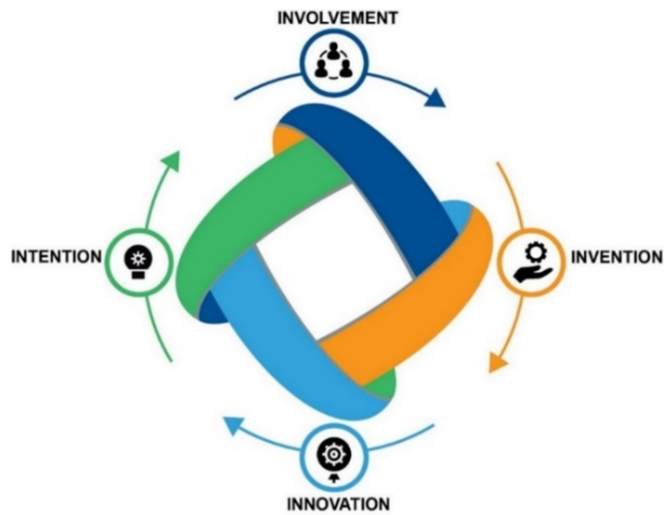
# Introduction to the Social Innovation Module

We are all aware of problems that affect individuals and communities. Some of these problems strike a chord with us, and there is a strong motivation for creating changes that will alleviate this problem, which sets our *intention* to solve it. How does this happen? Often bringing together the perspectives of others, and working collectively with their strengths is often needed to affect change. The *involvement* of others, then can then lead to *invention* and creative solutions to a social problem. The resulting impact of these solutions creates social *innovation*.

The cycle of innovation can look like this:




*Cycle of Innovation Image adapted from: http://www.sigeneration.ca/nesting-social-innovation/ by Cheryl Rose. Retrieved on October 26, 2017.

Keep in mind that these stages can appear many times throughout a social project.

This module is designed for beginners - You do not necessarily have to have experience leading initiatives to get the most out of the material. It was created based on the belief that there can be tremendous value in small initiatives taken by individuals. Some of these initiatives may grow into much larger ones – while others may remain small, yet highly significant to the people that are affected by them. Each unit features effective techniques to maximize the potential to bring about the desired changes, and tell if you were successful in bringing about the changes you want to see.

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**Social Innovators on the Ground Say**

"When you are looking at social innovation, the whole idea behind it is, 'you can do it' Not, 'no, this won't work'. We didn't spend a lot of time talking about the no's."

The module consists of:

| | |
|---|---|
| **UNIT ONE** | **Building Effective Social Innovation Ideas** |
| **UNIT TWO** | **Project Planning** |
| **UNIT THREE** | **Successfully Communicating and Building Relationships** |

In each unit you will be given an opportunity to work through learning activities so that you can engage in critical thinking and come away with practical skills. The hope is this module will help you start with an intention to solve a social problem and uncover a social innovation along the way whether you are learning about social innovation, or working in an area that could benefit from this process.

## Learning Outcomes

*Here is what you will be able to do at the end of this module:*

- Define what social innovation means to you and its importance in addressing social issues
- Be able to apply innovative thinking during a social project cycle using key techniques

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# Unit One: Building Effective Social Innovation Ideas

### Introduction

The topics covered in this unit will introduce you to social innovation, and the initial steps in developing an idea. This unit is designed to provide ways to understand the problem you are tackling, generate the most creative solution, and make informed decisions before you are asked to commit resources, and collaborate with others on social projects.

In this unit you will be covering the following topics:

Topic One: What is Social Innovation?

Topic Two: Understanding the Problem

Topic Three: Gathering Input and Ideas from Others

Topic Four: Before Jumping In: Can your Idea be Done?

## Learning Objectives

*Here is what you will be able to do at the end of this unit to support the module learning outcomes:*

- Identify the key characteristics of social innovation and provide examples
- Use a variety of questions to assess a social problem and provide rationales for why it needs to be addressed
- Use group facilitation, and perspective taking to develop innovative ideas with others
- Use risk assessment techniques to judge the likelihood of success of potential solutions to social problems

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# Key Concepts

## Topic One

- Social Innovation
- Social Impact

## Topic Two

- Problem Definition
- Problem Symptoms
- Problem Causes

## Topic Three

- Peer Input Process
- Stakeholder
- Group Facilitator
- Perspective Taking

## Topic Four

- Feasibility
- Readiness
- Risks
- SWOT

# Learning Activities

*Complete the following practical learning activities:*

1. Complete Learning Activity 1.1: Examples of Social Innovation
2. Complete Learning Activity 1.2: Problem Definition Technique
3. Complete Learning Activity 1.3: Idea Generation Techniques
4. Complete Learning Activity 1.4: Feasibility Techniques

# Recommended Performance Evaluations

*To show you have learned the material, here is what you may be asked to complete:*

1. Unit Reflection
2. Discussion

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# Topic One:  What is Social Innovation?

You may be familiar with the term, innovation referring to technology. In a social context, **social innovation** can be seen as a term to describe a process that:

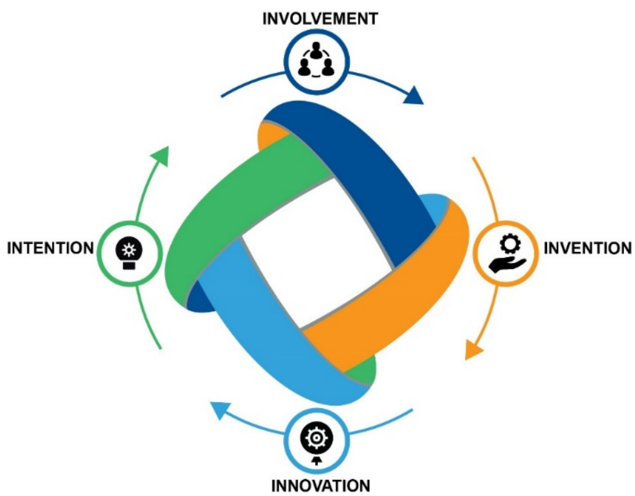
"Refers to the development of new ideas or the use of existing ideas to find solutions to social challenges. Social innovation entails an initiative, product, process or program that creates positive social outcomes for societies" (Social Science and Humanities Research Council of Canada).

Issues addressed through social innovation "can be as large-scale as fighting global climate change and reducing poverty or as small-scale as creating a community garden" (Goldenberg, Kamoji, Orton, & Williamson, 2009, p. 5)

Although, there can be many interpretations of social innovation, these two definitions focus on several core elements:

- There is an opportunity to address a social issue with an approach that is new, which can be adapted or inspired by different sectors
- Engaging collaboration with new people (e.g., communities, organizations) with new perspectives
- The key impact is performing a type of social good

Recall that in the introduction to this module, the idea of social innovation was at the end of the continuum that started with the intention to solve a social problem:




Let's start exploring some examples of social problems addressed by social innovation. The learning activity will help to engage with the material and concepts.

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# Learning Activity 1.1: Examples of Social Innovation

Directions

1. Read the two short examples of Social Innovation provided below.

Work through the consideration questions presented at the end of the examples. Ion, involvement invention and innovation of EXAMPLE ONE

A parent was telling an educator about how her 13 year old son who has autism was having difficulty doing his homework because when he works on the computer he is very easily distracted by noises lights and messages that pop up. While all children face these distractions, this child had more difficulty refocusing and it was causing him get behind in his school work. By coincidence, this educator had friends who were engineering students, and she asked them if there was a technological solution to this problem. She brought the parent and the engineering students together - and a solution was found.  This one idea has now grown into a large project, where a university sponsors a marathon every year, where parents of children with special needs give examples of problems they think might be solved by technology, and the university sponsors a three day "lab" where engineering students work on selected problems to produce customized solutions. - A small idea - and a huge **social impact**, which is overall effect your idea has at the end of the project.

EXAMPLE TWO

In a city in Europe, design students got together to discuss their concern about food wastage to combat the growing concern that many people in the community were hungry. They got together with local artists and held a one day workshop – with entertainment, discussions, and "how to" reduce food wastage. As a result of their efforts several hotels and restaurants changed their practice, which resulted in less wastage and more food available for food banks and other providers.

## Questions for Consideration:

What do these two scenarios have in common? Try to identify the following characteristics of social innovation from the examples:

1. What social problem or challenge are they addressing with a new approach?

2. What was the new approach?

3. How were others engaged in the project?

4. What was their desired positive social impact? Was it accomplished?

5. Are these projects big or small?

6. Can you identify any similarities between the two examples?

7. Given the above examples can you think of one other social innovation?

As you can see from the learning activity, identifying a problem is an essential first step, though recognizing the problem is not enough. What steps can you take to understand the problem and come up with solutions? How can you build upon the work of others to develop a unique idea?

For further inspiration, and exploration of the concept of social innovation:

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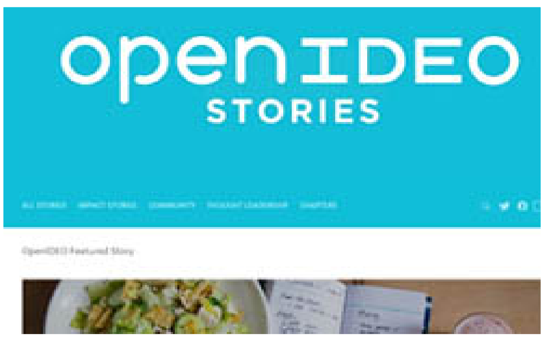
[Social Innovation Photograph] Retrieved from http://www.sigeneration.ca/home/linnovation-sociale/ November 09, 2017

Watch the supplementary video *"What is Social Innovation"* presented by Social Innovation Generation (SIG) a Canadian hub for social innovation.

See How Social Innovation has a positive impact on Canada? This video will help your understanding and provide more material for reflection.




[Open IDEO Photograph] Retrieved from https://openideo.com/November 09, 2017

Go to *Open Ideo Stories* found in the supplementary resources section. These stories can provide more examples big and small of projects being conducted around the world

## Topic Learning Checklist

| Can you identify? |
|---|
| ☐ Unique approaches to social problems? |
| ☐ The key problem that needs to be addressed |
| ☐ How did they improve on it to meet a need? |
| ☐ What can you say about the approach's effectiveness? |
| ☐ The social impact? |

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# Topic Two: Understanding the Problem

Review your own work on Learning Activity 1.1 and reflect on the following questions:

1. Can you think about another way to address the same problems introduced in the examples?

2. Can you find any evidence of your solution being implemented by others by searching the internet? If so, what do you think this tell you about your idea? If no, what does this tell you?

Problem solving is the spark, or inspiration for social innovation. Albert Einstein is quoted as saying: "If I had an hour to solve a problem I'd spend 55 minutes thinking about the problem and 5 minutes thinking about solutions."

That is, to solve a problem – 95 percent of the time needs to be spent on understanding or defining the problem, and 5% on the solution. While the exact percentage may be debatable – the main message is certainly true. Much time, effort and resources are wasted when we rush for solutions before we understand the problem. Understanding the cause of a larger issue is crucial and can often lead to innovative problem solving approaches while saving you valuable resources.

**Social Innovators on the Ground Say**

" It took a couple of meetings for us to get really, really clear on what are we actually trying to fix. From there we had to ask: Okay, who else has done this?"

Useful questions to uncover whether a problem is worth tackling are:

- Is the problem something that you are passionate about, and why?
- What are social factors have created, or **caused** the problem?
- What negative social effects, or **symptoms** are created by the problem?
- Who is affected by the problem?
- What stands in the way of solving the problem?
- Are there examples of "solutions" to the problem that have worked?
- Who else sees this as a problem? Do others see the problem in the same way as you do? If not, how do they see the problem?

Let's apply these questions in the following activity:

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# Learning Activity 1.2: Problem Definition Technique

## Directions

1. Read the example
2. Work through the technique using the example or substituting a social problem that you see every day or in your current or future work.
3. You can think about a problem individually, but there can be value in exploring a problem as a group to get everyone's shared vision of a project. Through the process below you can develop a reasoning behind pursuing a problem and show case your passion for the project by sharing it with others.

### EXAMPLE ONE

A social work student was doing a practicum at a parent support center. She noticed that very few parents were attending, even though in her estimation the resources offered at the center were very good. The center was in danger of losing its funding due to insufficient users. She thought that she would like to see if she could solve the problem, but first talked to different people about this. One person she spoke to said that the reason parents don't come is because in some cultures there is a stigma associated with reaching out and asking for help. Another said she thought that the main reason that parents don't come is that it isn't child-friendly enough, so that parents who are home with their children don't want to bring them. Another opinion concentrated on the quality of service provided. The student considered all these perspectives, and decided that she would focus on the third one… partly because this was something she could address within her role as a practicum student, and partly because she thought that by making the center more child friendly, with toys and books and activities for children, it would be more inviting to parents, and would help them become more comfortable in using the center.

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| PROBLEM DEFINITION TECHNIQUE | | |
|---|---|---|
| **#** | **Steps** | **Key Question for the Stage** |
| **1** | Identify the core problem | Why is the problem important to you?<br>Understanding why you are passionate about the question will motivate you to find a workable, creative solution. |
| Response: | | |
| **2** | Who is it a problem for? | What group of people are you trying to help? |
| Response: | | |
| **3** | What are the social or cultural factors at the root of this problem? | What is the core problem?<br>What are the symptoms of this problem?<br>What are the causes? |
| Response: | | |
| **4** | What is the evidence that the problem needs to be addressed? | What are the pros and cons of pursuing this problem? |
| Response: | | |
| **5** | Discuss the problem with others | What are others perspectives on the problem?<br>If the problem is something that you are passionate about, likely others will be too. |
| Response: | | |

Problem Definition Technique adapted from NESTA DIY Toolkit: Problem Definition Worksheet http://diytoolkit.org/tools/problem-definition-2/ Retrieved on: October 26, 2017 and NESTA DIY Toolkit: Causes Diagram worksheet http://diytoolkit.org/tools/causes-diagram/ Retrieved on: October 26, 2017

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## Questions for Consideration:

1. Summarize what you've learned throughout this process.

2. Did you find it helpful to engage with others around this problem? Did it help you in identifying unique ways to address the problem and help clarify your approach?

At this point you should have a sense of the work involved in identifying a problem, and supporting potential solutions with rationales. In our examples and in your own work you should see that there are benefits to engaging with others in coming up with solutions.

## Topic Learning Checklist

| Can you identify? |
| --- |
| ☐ The core problem being tackled? |
| ☐ What are some potential causes of the problem? |
| ☐ What are some potential symptoms of the problem? |
| ☐ What group of people are being helped? |
| ☐ Is the new approach effective? |
| ☐ What are potential other ways to see the problem? |

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# Topic Three: Gathering Input and Ideas from Others

How are new ideas for solving problems developed? Like our definition of social innovation, sometimes it will involve taking an old idea, but looking at it differently, thus adjusting the wheel, rather than reinventing it and, sometimes, it will involve taking a completely new approach. But whatever approach you will take, it is vital to get input from a variety of other people in this part of the problem solving process.

It is also important to try to get input from people who may have different perspectives, but have an interest in the outcomes of the project. These are called **stakeholders.** For example, if you were thinking about a problem that arose in your practicum in a mental health agency, you would try to involve someone who has been a client if this agency, people who work as front line staff in the agency, and someone in a leadership or decision making position. This is because the more diverse is the group for idea generation, the more likelihood of rich discussion and input.

**Social Innovators on the Ground Say**

" It wasn't just a gathering of people where there was a free-flowing conversation. We were at the table groups. There was table discussion. There were focused questions. There was time for feedback and responses were being written down in order to give us some sense of here is what we are hearing. Here is what we are noticing. This is giving us kind of a sense of where we need to go."

" It is about challenging ourselves to think outside the box. I think that we tend to do our work in silos and get so focused on how we do our work and the mandate that sometimes we don't look up and look around and see the power of doing some of those things together. "

An approach used by The United Way of Calgary and Area suggests that it is extremely important to have a good question to start any idea generation process. Basically, the question asks "how can we, or what can we do, to address a problem or accomplish what we want to achieve?"

Group discussions are generally used for idea generation – but if it is not possible to bring a group together, you can still use some of the tips for group discussions in conversations with people individually. Group discussion can be very informal, or more structured. To try it out follow the instructions below.

# Learning Activity 1.3: Idea Generation Techniques

## Directions

1. Building upon the problem you explored in Learning Activity 1.2.
   Note: Be sure to keep an open mind to the perspectives of others.
2. Use the tables and follow the steps in the process.
3. Your goal is to use this time to create a shared understanding between different people. Gather together a group of 3-4 people to discuss the problem you are looking to understand further.
4. Notice that you will be a **group facilitator** of the discussion. This means you guide the process, but do not overly involve your opinion. You are a listener, and provide space for discussion. You may want to ask permission to record the session.
5. Alternatively, complete the Perspective Taking Technique.

| PEER INPUT PROCESS TECHNIQUE | | |
|---|---|---|
| # | Steps | Key Question for the Stage |
| **1** | Clearly state the problem or idea you want feedback on. | Why are you exploring this problem and what difficulties are you facing? |
| Facilitator Notes | | |
| **2** | Let the group clarify the question | If the group is having a hard time explaining, allow time to clarify the question. |
| Facilitator Notes | | |
| **3** | **Allow the group time to ask probing questions** | **The group can now ask how, or why questions about the idea being explored to get an idea of the vision, and add their feedback** |
| Facilitator Notes | | |

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| | | |
|---|---|---|
| **4** | Allow time for the group to discuss the question or idea amongst themselves now that they understand the vision. | What are the pros and cons of pursuing this problem? |
| Facilitator Notes | | |
| **5** | Discuss the problem with others | What are others perspectives on the problem?<br>If the problem is something that you are passionate about, likely others will be too. |
| Facilitator Notes | | |
| **6** | The group facilitator can now provide feedback | What parts of the discussion really resonated with you?<br>What decision can you reach based on the feedback of the group?<br>Do you have any clear actions or direction from the group discussion? |
| Facilitator Notes | | |

Peer Input Process Technique adapted from United Way Calgary and Area Leading Boldly Peer Input Process http://www.calgaryunitedway.org/images/uwca/our-work/social-innovation/leading-boldly/6%20toolkit%20peer%20input%20process.pdf Retrieved on: October 26, 2017.

While facilitating a process like the one above helps guide others through ideas. An idea to help think differently is **perspective taking**. Essentially, putting yourself in a mindset of others. Taking time to understand how they might feel about a situation, or problem.

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Directions:

1. Follow the steps in order.
2. If you are learning on your own, without access to others like a trusted colleague or friend, try thinking about a problem from varying perspectives, and note all the observations that occur at each stage.

| PERSPECTIVE TAKING TECHNIQUE | | |
|---|---|---|
| Steps | **Perspective** | **Observations** |
| **1** | **Factual** | |
| **2** | **Emotional** | |
| **3** | **Logical** | |
| **4** | **Cautious** | |
| **5** | **Out-of-the-Box** | |
| **6** | **Managerial** | |

Perspective Taking Technique adapted from NESTA DIY Toolkit Thinking Hats Worksheet: http://diytoolkit.org/tools/thinking-hats/ Retrieved on: October 26, 2017

# Questions for Consideration:

1. Summarize the key points discussed at each stage of either the idea generation process, or perspective taking process. What are some key insights you uncovered?

2. What did you find rewarding and challenging about this process?

For more ways to gain feedback from others and generate ideas, see these supplementary resources:

*NESTA DIY Fast Idea Generator* Photograph] Retrieved from http://diytoolkit.org/tools/fast-idea-generator/November 09, 2017

A more advanced idea generation technique is the *NESTA DIY Fast Idea Generator,* it provides a more advanced framework and techniques to approach your social problem in multiple ways.

This is a good resource if you are asked to develop ideas at work, and have more familiarity with the field, or problem you are addressing.

The Centre for Disease Control and Prevention Photograph] Retrieved from https://www.cdc.gov/November 09, 2017

For a well-structured focus group approach the *Nominal Group Technique Guide* provided by The Centre for Disease Control and Prevention is an approachable explanation and breakdown of the steps involved in setting up a group discussion. Though slightly more advanced, it has shown to be highly effective in conceptualizing complex ideas.

# Topic Learning Checklist

| Can you identify? |
|---|
| ☐ Can you identify the different stages of the peer input process? |
| ☐ What are you trying to accomplish by gathering a group together? |
| ☐ What is the purpose of perspective taking? |
| ☐ How does the peer input process help you further refine your idea and understand the problem? |
| ☐ What are the potential pros and cons of each approach? |
| ☐ What are the potential pros and cons of each approach? |
| ☐ Are you looking for similarity or diversity in opinion? |

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# Topic Four: Before Jumping In: Can your Idea be Done?

By this time, you will have understood much about the problem you want to address, and have tested out your ideas for a solution with a number of different people. There is one more step that is very important to do before you jump in with a project. All projects entail some challenges, and there are few ideas that are guaranteed to be successful. However, there are some tried and true ways of assessing the degree of risk associated with a project. A simple way of doing this is brainstorming and making a list of potential challenges, for example:

1. People won't attend meetings
2. The costs will be too high
3. Neighbors may oppose the project because of noise level

Social Innovators on the Ground Say

" I understand that many of agencies can be risk averse. The question is: How do I get them from being a very siloed risk aversive group bound by rules and how do I get them to combine their services and work together? "

Now let's think about how these risks might impact your project.

It is important to think about these so you are prepared to encounter them, and decide if these risks can be overcome, or that the potential outcome of the project is worth the risk, or in other words the readiness of the project.

Let's try it in the following activity:

## Learning Activity 1.4: Feasibility Techniques

### Directions

1. To get you thinking about the **feasibility** which is the readiness of your project to move forward successfully and be able to complete its goal given your resources fill out the risk table to see where there are challenges or barriers to your project.
   - Write what would be the impact should this occur
   - Write what (if anything) can be done to minimize the risk
   - Write what would be the impact should the "the risk occurrence" actually occur.
2. Insert the content into the template below.

| RISK ASSESSMENT AND READINESS TECHNIQUE | | | |
|---|---|---|---|
| Risk | **Possible Impact of Risk** | **How to Minimize (if anything)** | **Actual Impact of Risk** |
| | | | |
| | | | |
| | | | |

Having placed all the information on a page, and looking at it together, helps arrive at an informed decision about the degree of risk you are willing to take. It is often helpful to set a degree of risk that you are willing to take.

It is interesting that what some people see as a risk, others see as a challenge - and in fact the boundary between these two concepts is often not clear. The very nature of innovation necessarily involves some risk, because it involves trying things that have not been done before. Being too afraid of risks can hamper your creativity and prevent you from actually making your good idea happen. **Deciding how much risk you can or want to take will be an important step.**

Social Innovators on the Ground Say

" In social innovation you are re-thinking how to work something, to do that you need a different type of thinker. So surround yourself with those kinds of people. You need those kinds of people. You need people that think like that. You might not like them. They might not be who you would normally go to for something but resist falling back on what is comfortable… ”

Now that you've thought of some risks and strategies to address them, the next step you can take is to further assess the project's feasibility by thinking about other key factors.

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The **SWOT** is a balanced approach for well-reasoned decision making. This technique can help you come to a better understanding of what makes your project unique and where the project may need help to succeed.

| | |
|---|---|
| **S** | **Strengths:**<br><br>What characteristics, talents or abilities can I or others capitalize on that will help me to achieve my goal(s)? |
| **W** | **Weaknesses:**<br><br>What weaknesses do I have that I can improve upon to increase my chances of success? |
| **O** | **Opportunities:**<br>What types of opportunities exist that can help me to eliminate or address my weaknesses or threats in a positive way? |
| **T** | **Threats:**<br><br>What types of threats or risks exist that may interfere with my goal? |

SWOT image adapted from TOWES Sharpening Goals Module p. 5. http://www.towes.com/media/43734/bvc%20mod%201%20unit%202%20july.16.p.doc Retrieved on: October 26, 2017

## Directions

1. Expanding on the Risk Assessment Technique work through the SWOT Analysis Technique.
2. Ask yourself the following questions remember to include as much detail as you can and ask for feedback to ensure you are being realistic in your critique of the project and your capabilities.
3. Insert the content into the template below.

- Strengths: What do you do better than anyone else that can help you propel your idea? What skills do you possess?
- Weaknesses: What weakness can you improve upon that will help your idea succeed? Be truthful.
- Opportunities. What resources do I have that can help me address my weaknesses and improve my idea?
- Threats: What are the risks to my idea, and can these risks be overcome with my strengths and opportunities?

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| SWOT ANALYSIS TECHNIQUE | |
|---|---|
| Problem or Idea: | |
| **Strengths** | **Weaknesses** |
| **Opportunities** | **Threats** |

*SWOT Technique Template Adapted from TOWES Sharpening Your Goals Module p. 9.
http://www.towes.com/media/43734/bvc%20mod%201%20unit%202%20july.16.p.doc Retrieved on: October 26, 2017

Threats and weaknesses can be seen as the risks to the project. But, if you believe in the opportunities and strengths the project can have its rewards. Taking a measured approach to the factors you've identified, rather than being too focused on risk will help you make the best decision possible.

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## Questions for Consideration:

1. From the SWOT Technique areas can you come up with a list of steps you can take to minimize your threats and weaknesses?

2. How can you refine your idea after going through this process? Are you more swayed to go forward with your project or stop?

For more ways to assess the readiness of your project see the following supplementary resource:


[*The Barrington Research Group* Photograph] Retrieved from http://www.barringtonresearchgrp.com/ November 09, 2017

A natural extension of *Risk Assessment and Readiness* is a *logic model. Dr. Gail Barrington* provides an activity that can be adapted to assess the feasibility of a project. Just insert your idea/problem into the Reason box and work from there. This activity will be explored further in Unit Two.

Throughout Unit One you have been given practical steps to guide the initial idea and development stage of a social innovation project, and learned to balance the excitement of a good idea by carefully considering the problem, get input and perspectives of others on the problem, and assessing the wider needs of a social project by balancing the opportunities with the risks and realities of going forward with the project.

# Topic Learning Checklist

| Can you identify? |
| --- |
| ☐ Potential risks/barriers that might slow your project down |
| ☐ Potential risks and barriers to a project |
| ☐ Can you identify strategies to overcome these barriers and risks |
| ☐ Strengths of your idea and project |
| ☐ Weaknesses of your project |
| ☐ Opportunities and resources to strengthen your project |
| ☐ Threats for completing your project |
| ☐ Whether to go ahead with the project. |
| ☐ Why it is important to accept a degree of risk in social innovation projects? |

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# Recommended Performance Evaluation 1: Unit Reflection

## Background Information

The unit reflection questions give you an opportunity to reflect on key learnings and takeaways from the material. The primary purpose of this activity is to ensure you have a platform to record key insights that can be applied to subsequent units and ultimately projects to which you are involved.

Consider the following questions using your experiences and key takeaways from Unit One. Your focus should be on capturing the key learnings from the unit, plus reflection and application.

## Directions

1. Revisit the learning checklists for each topic and complete the following questions:
   a. Topic One: What is Social Innovation?

   Can you define what social innovation means to you? Does your definition include completely new ideas, or adapting approaches in a new way?

   b. Topic Two: Understanding the Problem

   What types of social problems were you drawn to? How was your understanding of social problems improved by thinking deeper about the problem? What steps in defining the problem were the most difficult, and why? Which steps provided you with the most useful information, and why?

   c. Topic Three: Gathering Ideas from Others

   What did you find rewarding and challenging about engaging others in your idea generation processes? What do you see as the pros and cons of gathering feedback from others? Was it more helpful to engage in perspective taking? What pros and cons exist from each type of idea generation?

   d. Topic Four: Before Jumping In: Can your Idea be Done?

   How did assessing your strengths and weaknesses help your idea? Did anything surprise you about where your idea started and where it ended up at the end of this unit? Which activity did you find the most helpful in developing ideas?

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2. Thinking Broadly
    a. As you have gone through the topics, which topics fit under the different parts of the social innovation cycle:

| |
|---|
| |

    b. How has your understanding of *Innovation* changed after completing this unit? Think about how you defined innovation prior to this unit and note what, if anything, changed?

| |
|---|
| |

    c. Has your introduction to Social Innovation ideas changed the way you see your course, or your current or future profession?

| |
|---|
| |

# Recommended Performance Evaluation 2: Discussion

## Background Information

Now is the opportunity to discuss the things that you learned and found interesting from the unit. Please discuss with your classmates in the discussion forum. If you are learning elsewhere you can discuss what you have thought about with a friend, mentor, or colleague.

## Example Discussion Question

1. Make a post in the *week 1* discussion forum that includes:
    a. an example of social innovation
    b. what you found as the interesting approach to a problem
    c. what impact you see for these initiatives, or ones like them

2. In addition respond to your peers with value added responses i.e., responses that build upon the insights or examples presented, pose a question etc.

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## CONGRATULATIONS!

**You have finished Unit One. Please proceed to Unit Two.**

# Supplementary Resources

Social Innovation on the Ground: Accessible and Evidence-based Tools for Social Innovators. Final Study Report.

Topic One: What is Social Innovation?

IDEO: OpenIdeo Stories. Retrieved from: https://stories.openideo.com Retrieved on: October 26, 2017.

*Social Innovation Generation (SIG) "What is social innovation?" Video:* Retrieved from: *https://www.youtube.com/watch?v=1i7L6nOkQF0* Retrieved on October 26, 2017.

Topic Three: Gathering Input and Ideas from Others

Department of Health and Human Services Centers for Disease Control and Prevention (2008). Evaluation Briefs Number 7: Gaining Consensus Among Stakeholders Through the Nominal Group Technique (2008) Retrieved from: https://www.cdc.gov/healthyyouth/evaluation/pdf/brief7.pdf Retrieved on: October 26, 2017.

NESTA DIY Toolkit: Fast Idea Generator: Retrieved from: http://diytoolkit.org/tools/fast-idea-generator/ Retrieved on: October 26, 2017.

Topic Four: Before Jumping In: Can your Idea be Done?

Barrington, G. Logic Model Worksheet for "My Rich Uncle" Exercise Retrieved from: //fgdnk12.org/wordpress/wpcontent/uploads/2015/12/My_Rich_Uncle_Exercise_Barrington_Research_2015.pdf Retrieved on: October 26, 2017.

Note: Care was taken to provide supplementary materials that are from established sites. External links are not maintained by Bow Valley College and may become broken over time.

# References

Definitions of Social Innovation:


Goldberg, M., Kamoji, W., Orton, L. & Williamson, M. (2009). *Social innovation in Canada: An update.* A Report prepared for Canadian Policy Research Networks. Carleton University, Canada.

Social Sciences and Humanities Research Council of Canada. (2015). *Community and college social innovation fund.* Retrieved from: http://www.sshrc-crsh.gc.ca/funding-financement/programs-programmes/social_innovation-innovation_sociale-eng.aspx. Retrieved on: October 26, 2017


Adaptations:

Cycle of Innovation:


Social Innovation Generation. Image adapted from: http://www.sigeneration.ca/nesting-social-innovation/ by Cheryl Rose Retrieved on October 26, 2017.


Problem Definition Technique:


NESTA DIY Toolkit: Problem Definition Worksheet adapted from: http://diytoolkit.org/tools/problem-definition-2/ Retrieved on: October 26, 2017

NESTA DIY Toolkit: Causes Diagram Worksheet: adapted from http://diytoolkit.org/tools/causes-diagram/ Retrieved on: October 26, 2017


Idea Generation Techniques:


United Way Calgary and Area Leading Boldly Resources. Peer Input Process. Adapted from: http://www.calgaryunitedway.org/images/uwca/our-work/social-innovation/leading-boldly/6%20toolkit%20peer%20input%20process.pdf Retrieved on: October 26, 2017.

NESTA DIY Toolkit Thinking Hats Worksheet adapted from: http://diytoolkit.org/tools/thinking-hats/ Retrieved on: October 26, 2017


SWOT Technique:


Bow Valley College (2015). TOWES Sharpening Goals Module, p. 5. SWOT. Adapted from: http://www.towes.com/media/43734/bvc%20mod%201%20unit%202%20july.16.p.doc Retrieved on October 26, 2017


Feasibility Techniques:


Bow Valley College (2015). TOWES Sharpening Your Goals Module p. 9. Adapted from: www.towes.com/media/43734/bvc%20mod%201%20unit%202%20july.16.p.doc Retrieved on: October 26, 2017


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# Unit Two: Project Planning

## Introduction

If you have completed Unit One, you will have learned some effective techniques for developing your social innovation idea. Now, Unit Two is designed to help you set up your social innovation idea for success. Particularly on how to set attainable, and measurable goals that will set up your social innovation for success.

As you learned in Unit One, the ultimate goal of social innovation is to have an impact that creates a social good. At this point, you should be able to identify a solution to a social problem, and utilize input from a variety of stakeholders to hone your idea. Now, what steps can you take to effectively implement your project?

In Unit Two you will learn techniques to set realistic goals, develop a step by step plan to achieve these goals with the resources available, and measure your project's success.

The approach for Unit 2 will build on the work from the previous unit, therefore you can apply the techniques to previous examples. If you are developing your own social innovation project, you can apply these techniques to your development process.

In this unit you will be covering the following topics:

### Topic One: Defining Project SMART Goals

### Topic Two: Project Planning: The Devil is in the Details

### Topic Three: Evaluation Planning: How are we Doing?

## Learning Objectives

*Here is what you will be able to do at the end of this unit to support the module learning outcomes:*

- Utilize the SMART goal guidelines for planning achievable project goals
- Effectively initiate a project plan
- Assess the success of your project through quantitative and qualitative evidence

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# Key Concepts

## Topic One

- SMART Goals
- Outcomes
- Objectives
- Evaluation
- Performance
- Conditions
- Criteria

## Topic Two

- Simple Work Plan
- Detailed Work Plan
- Logic Model

## Topic Three

- Developmental Evaluation
- Quantitative Information
- Survey
- Qualitative Information
- Interview
- Closed-Ended Questions
- Open-Ended Questions

# Learning Activities

*Complete the following practical learning activities:*

1. Complete Learning Activity 2.1: SMART Goals Technique
2. Complete Learning Activity 2.2: Work Plan and Logic Model Techniques
3. Complete Learning Activity 2.3: Evidence Planning Techniques
4. Complete Learning Activity 2.4: Evaluation Questions Technique

# Recommended Performance Evaluations

*To show you have learned the material, here is what you may be asked to complete:*

1. Unit Reflection
2. Discussion

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# Topic One: Defining Project SMART Goals

**Social Innovators on the Ground Say**

" We had our own goals and objectives with each individual partner. I try to communicate these goals as much as I can with the group so that everybody feels like they are unique while being a part of a cohesive whole."

Often at the start of a project we set big goals for our project. We may want to improve the health and wellness of all Canadians – or change the world in other ways. However, when goals are too big they can lead to confusion about where to start. Breaking down a big goal into smaller ones can be less daunting, and show a logical approach for achieving your goals. Often, putting in place smaller goals as your project moves forward can be helpful. These are referred to as **objectives.** To illustrate how a goal will be achieved. One way to ensure your goals and objectives are feasible is by using the **SMART approach.**

| | |
|---|---|
| **S** | Specific<br>Does the goal focus on one individual task, project, context or behavior that focuses on a single end result? |
| **M** | Measurable<br>Is the goal observable and measurable with details that can be counted or seen? |
| **A** | Attainable<br>Is the goal realistic and achievable; is it within a person's available resources, workload, timeframe, and abilities? |
| **R** | Relevant<br>Is the goal related and meaningful to the problem you are trying to solve, does it accurately reflect the situation, context, circumstance, or reality? |
| **T** | Time bound<br>Does the goal have a clearly defined time frame, deadline or specific dates assigned to it? |

SMART Goals Definition. Image adapted from TOWES: Goal Planning Essentials. Unit 1: The SMART Goal, p. 4. Retrieved on November 20, 2017.

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Notice that the SMART approach can be easily tied to important stages in a project.

Keeping your goal specific and relevant ties back to your work on defining the problem in Unit One. Ensure that your goals can be tied back to the problem and the challenges you identified at that stage of project planning. Continually checking if your goals will meet what you set out to do is an excellent way to set yourself up for success as the project goes along. If you completed work on the problem definition, you may want to refer back to this work when setting your SMART goals.

The importance of the rest of the letters will become clear after finishing this unit, but a particularly important part of the smart goals focus on *measurable* information. This is an important part of assessing the impact of your innovation. Though it can be challenging to think of measurable impacts, or outcomes the benefits of measuring your goals will help you demonstrate how your project was successful. These measurable goals will be important for evaluation of your project. You will learn the importance of evaluation later in Unit Two.

An effective SMART Goal not only ties to the definitions in the SMART. It should also address three criteria:

### Performance

What the project should be able to do or produce at the end?

### Conditions

What is needed from the team, or environment in order to reach that level of performance? What may hinder this?

### Criteria

What level of achievement do you set for yourself in order to consider the goal achieved.

Why don't you try setting some SMART goals of your own in the following activity?

## Learning Activity 2.1: SMART Goals Technique

### Directions

1. Read the two examples.
2. Using the SMART Goal Template break down the potential goals and think about the different SMART areas
3. Respond to the Questions for Consideration

In a set of recent interviews conducted by Bow Valley College with social innovators the following goals were expressed:

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## EXAMPLE ONE

To help the community come together to support children, youth and families who were experiencing difficulties after a major disaster. As well as build capacity in the community to provide mental help supports.

Possible Goals:

1. Improve mental wellness through a recovery program centered on children and their families.
2. Build capacity through demonstrating mental health support for children and families.

Attainable objectives

- Help a certain number of children
- Establish community locations where wellness and recovery techniques are promoted
- Become an approachable resource for mental health in the community while working with other community workers in similar areas.

Performance:

Provide wellness approaches in the community and have community members capable of the same.

Conditions:

Adoption of the methods by the community and stakeholders.

Criteria:

Setting the number of children and families seen.

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## EXAMPLE TWO

To prevent the run-around experienced by individuals who need to access multiple social services by creating a streamlined process of collaborating organizations who often see the same people.

Possible goals:

1. Provide an integrated recovery program for individuals suffering from interrelated social and health problems.

Attainable objectives

- Partner with social services that are experts in the social problems they want to address
- Establish a cohesive system between partner organizations for information sharing about clients with interrelated social problems
- Test the system by presenting the streamlined service to clients of social service programs.

Performance:

Provide a set of services to individuals in need of multiple social service supports. Show that it is a viable model for social service organizations

Conditions:

Partners to agree on process and how to work together. Feedback on the project is positive.

Criteria:

Set a number of individuals put through the service model. A number of organizations interested in an integrated service.

Now use the Smart Goal Table to develop goals based on the example, or for your social innovation idea. Keeping in mind all you have learned from this topic.

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| DEFINING SMART GOALS TECHNIQUE | |
|---|---|
| **IDEA** | |
| **GOAL** | |
| **S** | Specific: Does the goal focus on one individual task, project, context or behavior that focuses on a single end result? How? |
| **M** | Measurable: Is the goal observable and measurable with details that can be counted or seen? How? |
| **A** | Attainable: Is the goal realistic and achievable; is it within a person's available resources, workload, timeframe, and abilities? How? |
| **R** | Relevant: Is the goal related and meaningful to the problem you are trying to solve, does it accurately reflect the situation, context, circumstance, or reality? How? |
| **T** | Time bound: Does the goal have a clearly defined time frame, deadline or specific dates assigned to it? How? |
| **PERFORMANCE** | |
| **CONDITIONS** | |
| **CRITERIA** | |

*Defining SMART Goals Technique adapted from TOWES Goal Planning Essentials

Workbook: Unit 1: The SMART Goal, p. 4. Retrieved from http://www.towes.com/media/43725/bvc%20mod%201%20unit%201%20july.16.p.pdf

Retrieved on November 20, 2017.

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# Questions for Consideration:

1. Can you think of an additional goal for the social innovation examples that addresses the SMART goals?

2. Given the examples which social innovation is better prepared to develop effective SMART Goals?

3. What areas of SMART did you find more difficult to develop for the examples?

4. Which area(s) of SMART do you think are the most valuable to have in your project plan as you move forward with your idea?

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# Topic Learning Checklist

| Can you identify? |
|---|
| ☐ The SMART goal areas and give examples |
| ☐ What an outcome and objective are |
| ☐ What potential performance, conditions and criteria you would use to measure your goals |
| ☐ Any goals in the examples that need to be better defined using the SMART guidelines. |

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# Topic Two: Project Planning: The Devil is in the Details

Social Innovators on the Ground Say

" Take time to plan. Initially we took it all in and see where we were needed rather than just jump in with both feet, then after when we did jump in with both feet we knew that we could do what we needed to do, and we just did it. "

Making good ideas “happen” doesn’t just happen. Good planning is one of the key factors that can ensure the success of your project. Overlooking some of the details involved in planning can sometimes result in unnecessary setbacks or even total failure. Certainly, the unexpected happens in all projects, and plans need adapting or changing. But every project needs a road map. There are many sophisticated tools and resources that can be used for planning, but one way to start is to simply work backwards from your goal. Ask yourself:

- What do you want to accomplish?
- What do you (or others in the project) need to do to make that happen?

Once you have outlined the main steps of what needs to be done, visit each step and define the tasks that need to be done to make that happen.

Now think about the example social innovations, or your own project. What tasks would be needed to achieve your goals?

## Learning Activity 2.2: Work Plan and Logic Model Technique

Social Innovators on the Ground Say

"The ideas changed all the time about what the partners wanted to do. So, we may have thought that somebody with an established business has a clear direction of where they are headed and that really didn’t prove to be true in practice. Which doesn’t mean you don’t want to work with them, but as researchers you need to be pretty nimble and flexible and be able to change course according to the partners needs or interests."

"A very precise mandate at the beginning, but as the community's needs changed and there needed to be flexibility with the program which ended up working fabulous ...so that it wasn't a rigid program and it seemed to be able to bend with the needs of the community and with the people that they were servicing."

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If you have done the feasibility assessments in Unit One, it can serve as an important planning tool. Now you can add to the feasibility assessment by reviewing the activities you would like to accomplish related to your SMART Goals.

Ask these or similar questions:

- How can you break down a project goal into smaller attainable steps?

- What needs to be done to make these happen?

- Who is responsible for this?

- At what stage should this be done?

- By when should it be completed?

## Directions

1. Review the questions
    a. Complete the *High-Level Work Plan*
    b. Complete the *Detailed Work Plan*
2. Complete the *Rich Uncle Logic Model*
3. Respond to the Questions for Consideration

Think about these questions by completing the following:

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| HIGH-LEVEL WORK PLAN TECHNIQUE | | | | |
|---|---|---|---|---|
| Project Goal | | | | |
| Rank | Task | Resources Needed/Who | Date Due | Completed? |
| 1 | | | | |
| 2 | | | | |
| 3 | | | | |
| 4 | | | | |

Work Task Planning Technique adapted from TOWES Goal Planning Essentials

Workbook: Unit 3: Creating a Work Plan, p. 22. Retrieved from http://www.towes.com/media/43737/bvc%20mod%201%20unit%203%20july.16.p.pdf. Retrieved on November 20, 2017.

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Be sure to invest some time thinking about activities and ways you can develop your project to carry on after the timeline of your project. Thinking about the end of your project now, can set you up to continue to make an impact in the future even if the current project ends.

Some potential questions:

- How can the people and resources you have continue to make an impact?

  (e.g., do they share your vision, are they trained at the end of the project to make a difference in the community.)

- How can your ideas be incorporated into more initiatives around the problem you want to solve?

Now think about potential barriers that could impede progress for your project, as well as potential solutions and include that in your table as well.

| DETAILED WORK PLAN TECHNIQUE | | | | | | |
|---|---|---|---|---|---|---|
| Project Goal: | | | | | | |
| Rank | Task | Resources Needed/Who | Date Due | Completed? | Anticipated Obstacles | Possible Solutions |
| 1 | | | | | | |
| 2 | | | | | | |
| 3 | | | | | | |
| 4 | | | | | | |

Work Task Planning Technique adapted from TOWES Goal Planning Essentials

Workbook: Unit 3: Creating a Work Plan, p. 23. Retrieved from http://www.towes.com/media/43737/bvc%20mod%201%20unit%203%20july.16.p.pdf. Retrieved on November 20, 2017.

Now that you've had some practice with developing goals and creating actionable tasks to achieve them, how do we put them all together in a project plan? A **logic model** is often used to illustrate how the project activities and resources will achieve your desired goals. These are often useful, when you are wanting to develop a proposal for funding to show that your project is well thought out and achievable.

To get a sense of how to develop a logic model, let's use an activity developed by Dr. Gail Barrington. Here, she uses a "rich uncle" as the person who is looking at your plan to make sure it is sound. As you learned in Unit One, the feasibility of your project is important for getting others on board and invested in the project. If you completed the feasibility techniques in Unit One you can refer back to them as you apply this activity to your own ideas.

Once you have completed this activity you should easily be able to use the steps for your own project.

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| RICH UNCLE LOGIC MODEL TECHNIQUE | | |
|---|---|---|
| Context: Your rich uncle is willing to give you $30,000 for a car, but in order to get the money you need to explain why you need it. | | |
| Step 1: Purpose | List at least **three** compelling reasons why you need the car. | Why does your project matter? |
| Response: | | |
| Step 2: Resources (Inputs) | What will you need to have organized and in place before you get the car? | This will show that you are organized and know what it takes to implement your project (Resources/people) |
| Response: | | |
| Step 3: Main Activities | Your uncle wants to get an idea of how you will use your car on a regular basis. What are **three** main activities you will be doing? | What are the main activities of your project that you will move your project forward? |
| Response: | | |
| Step 4: Evidence of Use (Outputs) | Your uncle lives far away, and he wants to make sure you spent his money on a car and that you are actually using it. What **concrete proof** could you give him every 6 months that shows you are using his money correctly? | What **measurable** ways can you show that you are achieving your goals? These are often used to report on your activities. |
| Response: | | |
| Step 5: Outcomes | Finally, after three years you suddenly hear from your uncle that he will be coming for a visit. You are going to want to show him how the car has improved your life. What are **three** things can you show him? | These are the overall outcomes of your project. What impact have you made? |
| Response: | | |

*My Rich Uncle Logic Model adapted from Barrington Research Group. Logic Model Worksheet for My Rich Uncle Exercise. Retrieved from: http://www.barringtonresearchgrp.com/publications.html Retrieved on November 20, 2017.

You have now made a basic logic model.

Notice that measurable evidence is highlighted in Step 4. How can you provide proof of the effectiveness of your project in Step 5? One way is to evaluate your project. You will learn about evaluation in the next topic.

Note:

It is important to have an initial, well thought-out, feasible plan. However, it is also important to be flexible as you can see by the quotes. Many social innovators express that you should be adaptable in order to respond to changes along the way. Changes can happen by learning some ways to evaluate your project in the next topic, you can find ways to measure success at multiple points during your project so that you are learning what works and what doesn't as you go.

Social Innovators on the Ground Say

"The ideas changed all the time what they wanted to do. Initially we may have thought that somebody with an established business has a clear direction of where they are headed, but that really didn't prove to be true in practice. Which doesn't mean you don't want to work with them, but as researchers you need to be pretty nimble and flexible and be able to change course according to the partners needs or interests. "

"We had a very precise mandate at the beginning, but as the community's needs changed and the target group needs changed so having a flexible program was fabulous. It wasn't a rigid program, so it seemed to be able to bend with the needs of the community and with the target group that they were servicing.."

## Questions for Consideration:

1. How did the project planning activity refine your SMART Goals?

2. How did the project planning activity help you be aware of risks and solutions to help you manage your project?

3. How might the work plan techniques help you on a day-to-day basis?

| |
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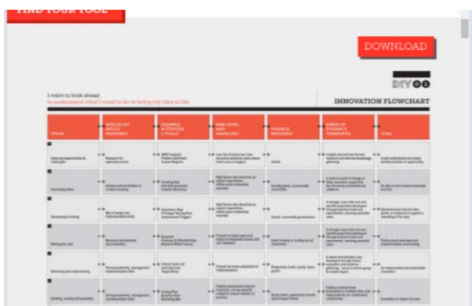
| |

4. How might the logic model help you when evaluating your project?

| |
|---|
| |

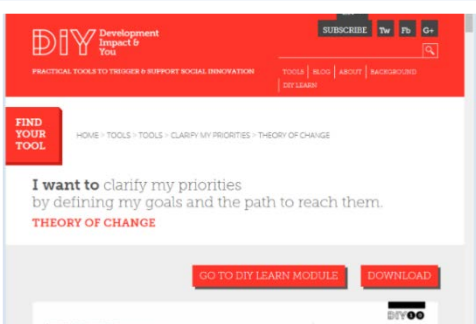
For a more advanced project planning workflow and logic model see the following in the supplementary resource section.

NESTA DIY Toolkit: Innovation Flowchart. This flowchart is a more thorough form of the work-task planning technique that includes a detailed plan and higher-level decisions.




NESTA DIY Toolkit: Innovation Flowchart Retrieved from: http://diytoolkit.org/tools/innovation-flowchart-2/ Retrieved on: November 20, 2017.

NESTA DIY Toolkit: Innovation Flowchart. This flowchart is a more thorough form of the work-task planning technique that includes a detailed plan and higher-level decisions.




NESTA DIY Toolkit: Theory of Change Retrieved from: http://diytoolkit.org/tools/theory-of-change/

Retrieved on: November 20, 2017.

NESTA DIY Toolkit: Theory of Change worksheet. Theory of change is another term for a logic model. This worksheet follows many of the same steps as the logic model activity you worked through, but adds key assumptions that you are assessing at each stage of the model.

## Topic Learning Checklist

| Can you identify? |
| --- |
| ☐ Are you able to connect your original project SMART Goals to manageable tasks in your project plan? |
| ☐ Can you identify the people you will need to help you complete your tasks? |
| ☐ How thinking about potential barriers can help in project planning? |
| ☐ How your goals connect with the rest of the planning activities in a logic model? |

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# Topic Three: Evaluation Planning: How are we Doing?

Many people tend to think of evaluation as something that happens at the end of a project that indicates whether or not a project has been successful. Indeed, most people will want to know whether or not a project is successful. But actually, evaluation should be an ongoing process that allows you to get feedback, so that you can make changes and adaptations as required. One form of evaluation that allows for such flexibility is called **developmental evaluation** which can be extremely useful.

**Social Innovators on the Ground Say**

***" The evaluation will help us when we do collaborations again in the future – What parts worked brilliantly and what parts of the collaboration, when looking at the cost and benefit, were not strong enough."***

***"The project team were responsive to changes in terms of data collection tools. So I think part of it was that team and their willingness to be flexible and approachable with implementing the various projects. "***

As you put your unique idea into practice you are learning what works and what does not this is the part of social innovation that can be among the hardest to determine. It is therefore important to plan your evaluation activities at the very beginning of the project – after you have set your project goals. If you have formulated SMART goals in Topic One, you will recall the "M" of "SMART" asks "can it be measured?" Or, more simply "how will you know you're meeting your goals?" It may be helpful to review this portion of your SMART goals, and decide when, where, and how to evaluate the project. Although it may seem difficult to measure a social impact, there are some basic concepts for measuring that you can apply early and often in the project.

To start planning the evidence you want to gather. It is helpful to go back to questions from previous units such as:

- What is unique about your project

| |
|---|
| |

- What is the overall goal of your project?

| |
|---|
| |

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- Are the goals you've developed for your project measureable
  What are some concrete ways you can measure your goals?

| |
|---|
| |

At the start of your project you may not have as much evidence, but you should jot down the question you want to answer, or provide evidence for. As you go through this topic you will learn strategies on how to gather information by asking different questions.

By making note of what you want evidence for, you can make sure to answer them. Your questions may grow or change as the project progresses, but making note of changes and evidence to support these changes from beginning middle and end you are well positioned to show how your project worked from idea to practice.

The following activity can be used to develop a template for linking your goals to evidence

# Learning Activity 2.3: Evidence Planning Technique

Directions

1. Using the table below, fill in your goal the objectives and outcomes you've developed, and potential sources of evidence.
2. Think about the measurable evidence you need. Think back to your SMART goals, and project planning activities.

| EVIDENCE PLANNING TECHNIQUE | | |
|---|---|---|
| ENHANCE<br>What does your project bring new value to?<br><br>What evidence do you need? | GOAL OF YOUR PROJECT<br><br>OBJECTIVES | REPLACE<br>How does the project show that new ways are more desirable? Can your project be used in different contexts?<br><br>What is your evidence do you need? |
| What does your project bring new value to?<br><br>RE-USE<br>What evidence do you need?<br><br>What evidence did you collect? | OUTCOMES | What evidence do you have?<br><br>LIMIT<br>What are the limits of your project?<br><br>What evidence is important not take out of context? |

*Evidence Planning Technique adapted from Nesta DIY Toolkit: Evidence Planning Retrieved from: http://diytoolkit.org/media/Evidence-Planning-A4.pdf Retrieved on: November 20, 2017.

Now, what kind of information do you need to fill in the rest of the table with evidence? To gather information about your project you can use two types of information:

## QUANTITATIVE INFORMATION

Quantitative information relates to that which can be counted or represented numerically.

Albert Einstein is quoted as saying: "Not everything that counts can be measured, and not everything that can be measured, counts."

Very true, success cannot always be expressed numbers. But numbers can send a powerful message. Recall that when setting up your SMART goals you established a criteria for meeting your goal. This goal information can be counted and tracked and can help you set a level for success of your project. This is often key information for evaluation. Mostly because it can give a lot of cues.

Let's look at an example:

### EXAMPLE

Thirty people attended your first activity, and only five the next one. This may suggest a number of things that will need to be explored further by other evaluation techniques (below). Particularly, why there are fewer attendees for your second activity. But if there is a continually high number of participants, it tells you that something is going right! If you have developed a website for your project you may want to keep track of the number of visits to your website or develop a short feedback survey for your event. When gathering quantitative information it is important to know what questions to ask, and how to ask them.

From this example you can see the relevance of counting the number of participants at each event to compare the level of attendance from one event to the other. Then you might want to ask follow up questions to really understand the questions your curious about.

## Developing Effective Survey Questions

Aside from simply counting, quantitative information is usually acquired through the use of a **survey.** A survey asks people to respond to a number of questions either with a simple yes or no answer, or often, by asking them to rate, (say, on a scale of 1 to 5) or by asking whether they strongly agree, agree, do not agree, or strongly disagree).

These are targeted questions that you can answer to provide you with useful feedback in the percentages of positive and negative responses.

Let's say you asked some survey questions in addition to add evidence to the fall in attendance. Some questions you could ask in this style are:

- Would you recommend this event to a friend? (Y/N)
- Would you attend an event like this in the future? (Y/N)
- Is the content of the event relevant to your work? (Y/N)

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But in order to ensure that you get accurate information from the survey, it is important to learn how to ask the right questions. The following guide will assist in developing good survey questions:

| STEP | DESCRIPTION |
|---|---|
| 1. | Survey questions should be **short, specific** and **directly related to the question you want answered**. Respondents should be able to quickly, and easily understand what you are asking them. |
| 2. | Keep the language of the survey questions simple and use plain and simple wording. Avoid complex and lengthy questions and words that may be open to interpretation by the reader |
| 3. | Ask **one survey question at a time**. Do not use compound questions, Do not ask 'What do you think of __ and ___ instead if both are important, ask separate questions. Simple effective surveys should not take a long time to answer, **around 10-15 minutes** is preferred. |
| 4. | **Do not ask leading questions**. These questions that hint to the respondent that you want them to answer positively or negatively. |
| 5. | If you are looking to quantify, or count responses**. Use close-ended questions.** These questions only allow the respondent to answer using a specific list of up to 5 answers. |
| 6. | **Open-ended** questions are used when soliciting a more detailed answer from respondents such as their perception, 'why' they feel a certain way. But interpreting these responses is often hard to do in a quantitative way. |

Effective Quantitative Questions adapted from TOWES Research Essentials

Workbook: Unit 2: Gathering Information, p. 18. Retrieved from http://www.towes.com/media/43755/bvc%20mod%202%20unit%202%20july.16.p.pdf Retrieved on November 20, 2017

By being able to develop quality survey questions, here are some ways you can contribute to a social project:

- Survey creation to evaluate your project
- Project decision-making

Using the example, can you think of one more question to determine why the attendance decreased from the first to second activities? Describe the type of question used, by referring back to the table.

If you are interested in the last question about whether the content is serving the needs of your attendees you could add response options for likely job sectors of the attendees. For example:

Please select the area of work you are in:

- ☐ Social Services
- ☐ Law Enforcement
- ☐ Education
- ☐ Other

You will revisit these questioning techniques in the learning activity. But often a mix of quantitative information and qualitative information is desired for a full picture of a project evaluation, so now let's explore another type of information.

## QUALITATIVE INFORMATION

Now let's suppose you find some interesting numbers that give you cues toward a question you want more detail on. For example, you find a lot of your attendees have chosen other. How do you find out what that means? Or you might want more detail on why the event content was not relevant. Let the participant fill out what other means. You can follow this up with a less restrictive question.

Often you might want to get the input of key people involved in your project. A key strategy is interviewing these people to provide the added detail, perceptions, insights and beliefs. If, for example, your "counting" has shown that participation in your program has dwindled over the last two months; you may want to interview both participants who have stopped attending, as well as those who continued to attend – to explore the issue of attendance in more depth. One way of finding this out is through an interview.

**Social Innovators on the Ground Say**

" I would like to have gotten more people's feedback even if it meant you sit down and call everybody and just do the interviews over the phone that might have been helpful."

## Developing Effective Interview Questions

A key strategy for this is to develop interview questions that you may like to ask. But what is the difference between Quantitative questions (usually in a survey) and Qualitative questions (usually in an interview)? There are similar, but unique concerns for each type of information.

Closed-ended questions only allow a restricted set of responses (such as Yes or No – Y/N), but not opportunity to elaborate without further prompting. It is good practice to provide open-ended questions so that answers flow naturally from your interview participants. **Leading questions** are those that give the participant an idea of what you want them to say such as: Would you agree that homelessness is a big problem? Or: These days, technology can allow separate community organizations to community organizations to collaborate and share their experiences, doesn't it?

Just like quantitative information. It is important to ask the right qualitative questions and prepare beforehand.

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| STEP | DESCRIPTION |
|---|---|
| 1. | **Plan your questions**. Outline your information goals and organize or group related questions together. Think about the order of questions. Do they naturally flow from one to the next? |
| 2. | **Know your purpose**. Every question you ask should be related to your topic and should be helping to gather either facts or an opinion. Know what type of information you need to better understand the outcomes of your project. |
| 3. | **Start with general questions end with specific ones**. Start with the broader big picture questions then gradually drill down to specific questions. |
| 4. | **Ask about one thing at a time**. Make sure to write short and to the point questions, each question should cover a single point. If you want to know two different things, then it is better to ask two different questions. |
| 5 | **Ask essential questions**. Respect the participant's time if the question is not directly relevant or important to your research don't waste your time or the time of the respondent. |
| 6 | **Listen**. Don't interrupt. Make sure to carefully listen to the complete answer of the questions you ask. Remember the key to good questioning is the willingness to really listen to the answers. The whole purpose of the questions is to hear the information provided to you by the respondents. |

Effective Qualitative Questions table adapted from TOWES Research Essentials

Workbook: Unit 2: Gathering Information, p. 20. Retrieved from http://www.towes.com/media/43755/bvc%20mod%202%20unit%202%20july.16.p.pdf Retrieved on November 20, 2017.

Given the example of event attendance, what question might you ask to get a participant's satisfaction, or perception of the activities?

| |
|---|
| |

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# Learning Activity 2.4: Effective Evaluation Questions Technique

Directions

1. Review the tables below
2. Practice developing effective questions in the different types by working through the questions that follow.

| QUANTITATIVE QUESTIONS TECHNIQUE | |
|---|---|
| Step | Description |
| 1. | Survey questions should be **short, specific** and **directly related to the question you want answered**. Respondents should be able to quickly, and easily understand what you are asking them. |
| 2. | Keep the language of the survey questions simple and use plain and simple wording. Avoid complex and lengthy questions and words that may be open to interpretation by the reader |
| 3. | Ask **one survey question at a time**. Do not use compound questions, Do not ask 'What do you think of __ and ___ instead if both are important, ask separate questions. Simple effective surveys should not take a long time to answer, **around 10-15 minutes** is preferred. |
| 4. | **Do not ask leading questions**. These questions that hint to the respondent that you want them to answer positively or negatively. |
| 5. | If you are looking to quantify, or count responses**.** Use **close-ended questions.** These questions only allow the respondent to answer using a specific list of up to 5 answers. |
| 6. | **Open-ended** questions are used when soliciting a more detailed answer from respondents such as their perception, 'why' they feel a certain way. But interpreting these responses is often hard to do in a quantitative way. |

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Let's start thinking about gathering quantitative information in a simple survey. If you are helping to develop a survey you might run into these types of questions:

a. Did you attend event one?
b. Did you attend event two?
c. What about the event did you like?
d. Didn't you find the event helpful?
e. Would you recommend this event to friends or colleagues?

Think critically about the questions above:

1. If your goal is to determine numbers related to the event what question would you choose, and why?

2. Which question(s) are leading?

3. Which questions would you likely follow up with a qualitative techniques?

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| EFFECTIVE QUALITATIVE QUESTIONS TECHNIQUE | |
|---|---|
| Step | Description |
| 1. | **Plan your questions**. Outline your information goals and organize or group related questions together. Think about the order of questions. Do they naturally flow from one to the next? |
| 2. | **Know your purpose**. Every question you ask should be related to your topic and should be helping to gather either facts or an opinion. Know what type of information you need to better understand the outcomes of your project. |
| 3. | **Start with general questions end with specific ones**. Start with the broader big picture questions then gradually drill down to specific questions. |
| 4. | **Ask about one thing at a time**. Make sure to write short and to the point questions, each question should cover a single point. If you want to know two different things, then it is better to ask two different questions. |
| 5. | **Ask essential questions**. Respect the participant's time if the question is not directly relevant or important to your research don't waste your time or the time of the respondent. |
| 6. | **Listen**. Don't interrupt. Make sure to carefully listen to the complete answer of the questions you ask. Remember the key to good questioning is the willingness to really listen to the answers. The whole purpose of the questions is to hear the information provided to you by the respondents. |

Turn the following into open-ended questions:

a. Did you like the event?

| |
|---|
| |

b. Did you find the application helpful?

| |
|---|
| |

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c. Are you planning to continue with the project?

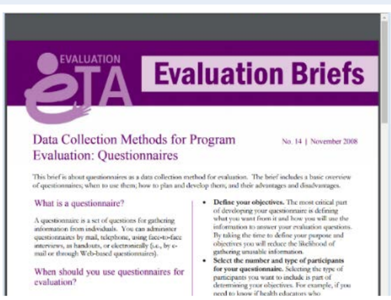
## Questions for Consideration:

1. Thinking about the difference between open and closed questions which provides you with more information?

2. Why might it be important to ask both quantitative and qualitative questions?

As you can see there are many things to consider when evaluating a project, here we have strived to provide you with quality skills to evaluate a small social innovation project. In bigger projects there might be more to consider, but these basic skills will provide a framework for you to explore the information you need to make informed decisions about your project.

For more information on techniques for evaluation see the following in the supplemental resources section:

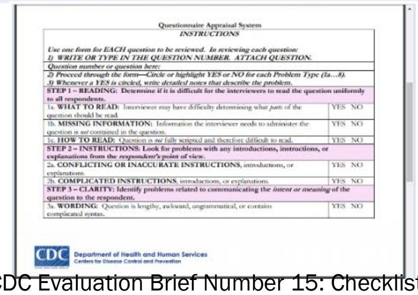

EVALUATION eTA Evaluation Briefs

Data Collection Methods for Program Evaluation: Questionnaires

No. 14 | November 2008

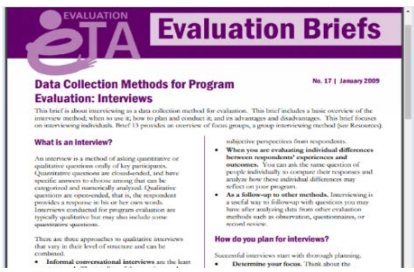
CDC Evaluation Brief Number 14: Questionnaires Retrieved from: https://www.cdc.gov/healthyyouth/evaluation/pdf/brief14.pdf Retrieved on: November 20, 2017.

The Centres for Disease Control (CDC) evaluation brief on questionnaires provides more information on planning a questionnaire or survey, and a more in-depth discussion of how to effectively administer a questionnaire.




CDC Evaluation Brief Number 15: Checklist to Evaluate the Quality of Questions Retrieved from: https://www.cdc.gov/healthyyouth/evaluation/pdf/brief15.pdf Retrieved on: November 20, 2017.

The Checklist of Effective Questions is a more advanced and detailed assessment of quantitative questions. Including how to troubleshoot problematic questions.




CDC Evaluation Brief Number 17: Checklist to Evaluate the Quality of Questions Retrieved from: https://www.cdc.gov/healthyyouth/evaluation/pdf/brief17.pdf Retrieved on: November 20, 2017.

The CDC evaluation brief for interviews will provide further information on how to develop and conduct an effective interview.


NESTA DIY Toolkit: Learning Loop Retrieved from: http://diytoolkit.org/tools/learning-loop/ Retrieved on: November 20, 2017.

The DIY Toolkit learning Loop provides a simple template for collecting insights and feedback, as well as tracking your established measures of success. This will provide a simple workflow for your evaluation cycle at various points in your social innovation project.

The Project Innovation provides advanced frameworks for conducting various evaluation and information gathering techniques in both quantitative and qualitative ways.

## Topic Learning Checklist

| Can you identify? |
| --- |
| ☐ How your project goals and planning are tied to your evaluation plans? |
| ☐ The difference between quantitative and qualitative questions |
| ☐ How to create effective quantitative questions? |
| ☐ How to create effective qualitative questions ? |
| ☐ When to use the two types of questions ? |
| ☐ What pitfalls to avoid when creating the two types of questions ? |

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# Recommended Performance Evaluation 1: Unit Reflection

## Directions

1. Revisit the Learning Checklists for each topic and complete the following questions:

a. Topic One: Defining SMART Project Goals

Think about the SMART Goals you created for the examples, or your own innovation project. In your opinion which was the hardest letter to develop for your goal. Which letter is the most useful in your opinion as you start developing a social innovation project?

b. Topic Two: Project Planning: The Devil is in the Details

Explain how your project plan, and the manageable tasks identified help you refine your SMART Goals

c. Topic Three: Evaluation Planning: How are We Doing?

Given what you have learned about evaluation. Why is it important to evaluate your project at the beginning middle and end? What is an example of a benefit and a challenge of keeping your project and its evaluation flexible?

Thinking Broadly

a. Can you identify how each topic in this unit is related to each other? How have the SMART project goals informed your evaluation and how have these two topics informed your project planning?

b. Thinking back to Unit One, how do you feel having a well-defined social problem helped or challenged you when developing your goals, evaluation and project plan?

# Recommended Performance Evaluation 2: Discussion

## Background Information

Now is the opportunity to discuss the things that you learned and found interesting from the unit. Please discuss with your classmates in the discussion forum. If you are learning elsewhere you can discuss what you have thought about with a friend, mentor, or colleague.

## Directions

1. Make a post in the Unit Two discussion forum that includes answers to:
   a. If you were asked to recommend one of the planning techniques you learned in this unit for a future or current social project, which would you be most likely to recommend? Why?
   b. If you were asked to recommend one of the planning techniques for your daily work, which would you likely recommend.
   c. Are your answers different? If so, why do you think that is? If not, why not?
2. Engage with your classmates, friends, or colleagues around your answers. Engage in discussion with others whose viewpoints may be different than your own

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# CONGRATULATIONS!

**You have finished Unit Two. Please proceed to Unit Three.**

## Supplementary Resources

Social Innovation on the Ground: Accessible and Evidence Based Tools for Social Innovators

Topic Two: Project Planning: The Devil is in the Details

NESTA DIY Toolkit: Innovation Flowchart Retrieved from: http://diytoolkit.org/tools/innovation-flowchart-2/ Retrieved on: November 20, 2017.

NESTA DIY Toolkit: Theory of Change Retrieved from: http://diytoolkit.org/tools/theory-of-change/ Retrieved on: November 20, 2017.

Topic Three: Evaluation Planning: How are We Doing?

CDC Evaluation Brief Number 14: Questionnaires Retrieved from: https://www.cdc.gov/healthyyouth/evaluation/pdf/brief14.pdf Retrieved on: November 20, 2017.

CDC Evaluation Brief Number 15: Checklist to Evaluate the Quality of Questions Retrieved from: https://www.cdc.gov/healthyyouth/evaluation/pdf/brief15.pdf Retrieved on: November 20, 2017.

CDC Evaluation Brief Number 17: Interviews: Retrieved from: https://www.cdc.gov/healthyyouth/evaluation/pdf/brief17.pdf Retrieved on: November 20, 2017.

NESTA DIY Toolkit: Learning Loop Retrieved from: http://diytoolkit.org/tools/learning-loop/ Retrieved on: November 20, 2017

Project Innovation: Methods & Skills Retrieved from: http://www.socialinnovationtoolkit.com/methods-skills.html Retrieved on: November 20, 2017

Note: While care was taken to provide supplementary materials that are all external links are not maintained by Bow Valley College and may become broken over time.

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# References


Adaptations:

Defining SMART Goals Technique

Bow Valley College (2015). TOWES Goal Planning Essentials

Workbook: Unit 1: The SMART Goal, p. 4. Retrieved from: http://www.towes.com/media/43725/bvc%20mod%201%20unit%201%20july.16.p.pdf Retrieved on: November 20, 2017

My Rich Uncle: Logic Model Technique

Barrington Research Group. Logic Model Worksheet for "My Rich Uncle" Exercise

Retrieved from: //fgdnk12.org/wordpress/wp-content/uploads/2015/12/My_Rich_Uncle_Exercise_Barrington_Research_2015.pdf Retrieved on: November 20, 2017

Evidence Planning Technique:

NESTA DIY Toolkit: Evidence Planning Worksheet Retrieved From: http://diytoolkit.org/media/Evidence-Planning-A4.pdf Retrieved on: November 20, 2017.

Work Task Planning Technique: Simple Work Plan

Bow Valley College (2015). TOWES Goal Planning Essentials

Workbook: Unit 3: Creating a Work Plan, p. 22. Retrieved from: http://www.towes.com/media/43737/bvc%20mod%201%20unit%203%20july.16.

p.pdf. Retrieved on: November 20, 2017.

Work Task Planning Technique: Detailed Work Plan

Bow Valley College (2015) TOWES Goal Planning Essentials Workbook: Unit 3: Creating a Work Plan, p. 23. Retrieved from: http://www.towes.com/media/43737/bvc%20mod%201%20unit%203%20july.16.p.pdf Retrieved on November 20, 2017.

Quantitative Questioning Table

Bow Valley College (2015). TOWES Research Essentials

Workbook: Unit 2: Gathering Information, p. 18. Retrieved from: http://www.towes.com/media/43755/bvc%20mod%202%20unit%202%20july.16.p.pdf Retrieved on: November 20, 2017.

Qualitative Questioning Table

Bow Valley College (2015). TOWES Research Essentials

Workbook: Unit 2: Gathering Information, p. 18. Retrieved from: http://www.towes.com/media/43755/bvc%20mod%202%20unit%202%20july.16.p.pdf Retrieved on: November 20, 2017.


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# Unit Three: Successfully Communicating and Building Relationships

## Introduction

Throughout each unit, you have seen that bringing people together in collaboration is important in all aspects of a social innovation project whether it's brainstorming an idea, creating a projects tasks and resources, and gaining input from others for evaluation purposes. This final unit addresses a topic often taken for granted – communication. You will see how communicating, and having effective work relationships can contribute to the success of your project as a whole.

In this unit you will be covering the following topics:

Topic One: Planning to Work with Others

Topic Two: Building Effective Relationships for Project Success

Topic Three: Communicating to Sustain your Project

## Learning Objectives

*Here is what you will be able to do at the end of this unit to support the module learning outcomes:*

- Identify stakeholders that are most helpful to your project
- Develop strategies for building effective working relationships
- Reflect on effective and non-effective working relationships
- Summarize your project
- Communicate the strengths of your project
- Communicate how the strengths can add to future projects

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# Key Concepts

## Topic One

- Stakeholder Identification
- Community Engagement

## Topic Two

- Working Relationship
- Rapport
- Authenticity
- Feedback

## Topic Three

- Scalability
- Sustainability
- Project Summary

# Learning Activities

*Complete the following practical learning activities:*

1. Complete Learning Activity 3.1: People and Connections Technique
2. Complete Learning Activity 3.2: Improving your Work Relationships Technique
3. Complete Learning Activity 3.3: Feedback Technique
4. Complete Learning Activity 3.4: Techniques for Communicating Impact

# Recommended Performance Evaluations

*To show you have learned the material, here is what you may be asked to complete:*

1. Unit Reflection
2. Discussion

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# Topic One: Planning to Work with Others

When starting to implement your project, there are often people and organizations that can help you integrate your project into the existing community. By identifying and approaching these people, rather than just inserting yourself and your project into their space, you are less likely to be met with resistance from existing stakeholders and they might be more willing to champion your project. When talking about working with others having connections to the people in the community that can help you is key: The people you are working with, and group you are aiming to help – your stakeholders.

**Social Innovators on the Ground Say**

" I think by using our connections already in the community and being mindful about asking the local agencies we seen as considerate of all the other people doing work in town which allowed our project to avoid the ire that was raised by some of the other organizations."

" So what we did initially is the project partners and sat down and decided who are we were going to invite to this community collaboration, and put it in the paper. We tried to really have representatives from different parts of the community. "

As discussed in the input gathering topic of Unit One, a stakeholder is any individual or group who is interested in the success of your project. Usually, they come from different organizations, and different ranks within organizations so how would you plan to work with them? Let's start with an example.

EXAMPLE

Let's say that you were planning to develop a community garden in a poorer neighbourhood. Your main goals could be:

- Engage youth in a positive community project; and
- Reduce grocery costs for low income families.

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Now let's think of who would your stakeholders be? The city council? The community council? A youth group in the community? Neighbourhood schools? A Garden Centre that could donate to the project?

Who else could be involved? What about the condo board in a building nearby that may not be enthusiastic about this project? It is important to involve stakeholders that may not be in favour of the project, because by involving them you may be able to hear their concerns and address them.

Once you have an idea of your key stakeholders, the next step will be to articulate in what way they will be included in your project. Were some important in the initial feasibility assessment (discussed in Unit One), but no longer need to be actively engaged? Will it be important to get continuous feedback from them as your project develops? What roles might stakeholders play besides giving feedback? (e.g., help to persuade others about the value of your project? Find donors to support the project? Contribute in particular skill areas?) It is helpful to spell out these expectations at the beginning. The chart below can be used as a guide:

The following activity allows you to think about what they need from you, and how you can mutually benefit from involvement and collaboration on the project

## Learning Activity 3.1: People and Connections Technique

### Directions

1. Using the example fill out the table below to get a clearer sense of how you can work with your stakeholder.
2. Complete the *Community Engagement Plan*
3. Respond to the questions for consideration

Take three of the identified stakeholders below from the example and fit them into the table. Thinking about how and when they could contribute to your project:

1. Neighbourhood families in a low-income area to establish their needs
2. Garden Centre to provide the food that will be grown
3. Condo Board who needs to be convinced before the garden can be approved

Assess whether you think you have enough interested stakeholder to help your project to move ahead.

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| STAKEHOLDER ENGAGEMENT PLAN TECHNIQUE | | | | | |
|---|---|---|---|---|---|
| **STAKEHOLDER** | **ROLE** | **CONTRIBUTION TO THE PROJECT** | **INVOLVEMENT: WHAT STAGE?** | **INVOLVEMENT: HOW MUCH?** | **IMPACT** |
| | | | | | |
| | | | | | |
| | | | | | |
| | | | | | |
| | | | | | |

The chart above can also be used to show:

1. Whether the relationship with the stakeholders is informal or formal;
2. Whether and what kind of agreements should be made with stakeholders(e.g., become formal advisors to the project); and
3. Stakeholders' levels of involvement, (e.g., Attend 3 meetings over the next 6 months, provide email feedback, champion the project through online posts or other means).

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You can use the chart to more fully understand your potential stakeholders. Some important information is added in the chart below for you to think about when engaging stakeholders:

How are your stakeholders similar or different from you?

- What are their needs?

| |
|---|
| |

- What can you offer them?

| |
|---|
| |

- What do you get in return?

| |
|---|
| |

- What existing community connections do they have?

| |
|---|
| |

- And how can you continue to grow this relationship?

| |
|---|
| |

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| PEOPLE and CONNECTIONS TECHNIQUE | |
|---|---|
| **Person, Group or Organization:** | |
| **Potential Role in the project:** | |
| **How are they similar and different from you?** | |
| **What are their needs?** | |
| **What can you offer them?** | |
| **What will you get in return?** | |
| **How can you work together and communicate?** | |
| **What existing groups could they connect you to?** | |
| **How frequently will you interact?** | |
| **How can your relationship grow?** | |

People and Connections Technique adapted from NESTA DIY Toolkit: People and Connections Map Retrieved from http://diytoolkit.org/tools/people-connections-map/ Retrieved on: November 20, 2017. & NESTA DIY Toolkit: Target Group Retrieved from: http://diytoolkit.org/tools/target-group/ Retrieved on: November 20, 2017

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You now have an idea of who, and why you should connect with the stakeholders you have identified. When connecting with them you can also express what you've learned through the social innovation project cycle from other units – your understanding of the problem, and your goals and ways to achieve them.

Your approach *should not* come off as critical of what has been done before, but how and why you want to work with them to create a better outcome from that what is currently seen. Note that while building your social innovation, you likely encountered others who also want to see the problems you are addressing resolved. The result of this strategy can help establish from the beginning a shared understanding and passion for the project as it moves along.

One effective way to connect with stakeholders and established *common interest* is through **community engagement** that is often as easy as talking to people in the community, and participation in events.

To provide opportunities to connect to potential stakeholders, it can be valuable to keep track of likely community events you can participate in that overlap with your desired stakeholders. Use the following table to develop a community engagement plan:

For example, which of the three stakeholders from your chart would you find at the following events?

- Community beautification projects.
- Volunteering at Foodbanks.

The Community Engagement Plan can help you to keep track of how effective community events are for connecting with potential stakeholders:

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| COMMUNITY ENGAGEMENT PLAN | |
|---|---|
| **How can I become visible to those that I want to connect with (e.g., community events)?** | |
| **Potential Person/Group/Organization** | |
| **Connections made?** | |
| **How can we work together/interests?** | |
| **Who else did they recommend (if anyone)?** | |
| **How do I plan to follow up?** | |

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# Questions for Consideration:

1. Why is it important to have input from a variety of stakeholders on your project?

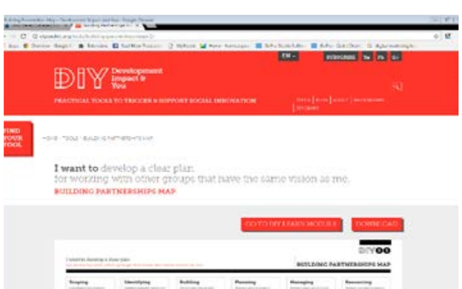
2. When looking a People and Connections Technique, and Community Engagement Plan are you more focused on establishing your stakeholder's needs or your own?

3. From the techniques you used, what are the key question for
Establishing connections with stakeholders?
Maintaining the connections with stakeholders?

4. What does this topic tell you about communicating throughout a social project?

# Supplementary Resource

For a more advanced look at establishing a partnership plan see:




NESTA DIY Toolkit: People and Connections Map Adapted from: http://diytoolkit.org/tools/people-connections-map/ Retrieved on: November 20, 2017.

NESTA DIY Toolkit: Building Partnerships Map in the Supplementary Resource section.

## Topic Learning Checklist

**Can you identify?**

- ☐ Relevant stakeholders for a project and their potential contributions.
- ☐ What you should focus on when making stakeholder connections?
- ☐ Why a community engagement plan can be useful?
- ☐ Ways you can grow and maintain stakeholder connections.

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# Topic Two: Building Effective Relationships for Project Success

Social Innovators on the Ground Say

" Collaboration is really about relationship building. I am far more likely to attempt to change something in my agency if I really like the people I am working with. If you don't get on well with someone then you are less likely to make a move for them, right? "

" There were some bumps along the way in establishing boundaries and roles and you know not stepping on each other's feet with regards to the work that each one of our team members was doing and because the role of the project wasn't really clearly defined it did take some ups and downs to develop that trust. "

" The support took a while to get into action and to grow because it was such a relationship-based support. So those relationships had to be developed first before we actually saw some movement occurring. Those take time."

Getting stakeholders involved in your project or initiative is a crucial first step, but time and time again we learn that lack of or insufficient communication is at the core of many of the difficulties faced by those involved in social innovation projects. Too much communication becomes a nuisance, and not enough may result in *a loss of engagement or interest.* How do you find the right balance? How do you match the mode of communication to the group of stakeholders you have identified? There are endless ways of communicating today – through text, Skype, and social media, and cloud platforms.

Whatever platform you use, good communication is *regular*, *ongoing*, and integral to establishing a positive **working relationship**. As you begin to implement a social innovation project working relationships matter as you likely will be helping to change the status quo, the communications you have can establish the passion of those working with you. Relationships are what allow us to achieve our goals and manage barriers or challenges that we might have to face. Having support and input from others in what we do—whether in a work, home or school situation—can be the difference between success and failure. Working environments are becoming increasingly more complex. Multiple skill sets, areas of expertise, or input from colleagues may be required in order to solve an issue effectively and minimize any negative impacts that we might not be able to manage by ourselves.

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*Taking the time early on* to invest in building positive relationships can benefit us now and in the future when we are trying to expand our networks or look for future opportunities.

A useful way to start thinking about work relationships is to answer the following questions:

1. Who are the people that enable the success of your work, at various levels of a project? Why?

2. Who are the people that can be a barrier to the success of your goals or work? What can you do to turn this relationship into a positive one?

3. Can you learn more about the people who are important to your success and try to understand or observe what barriers they might face to try to offer your support to them too?

4. Are your relationships mutually beneficial? Meaning is there a balance between the "giving" and the "taking" happening within each of your relationships to keep them positive?

5. Are you genuinely interested in building an authentic relationship with the individual(s)? Do they have the right balance of personal disclosure and asking questions about the other person?

List of questions from: TOWES Goal Planning Essentials Workbook Unit 4: Ensuring Project Success, p. 4. Retrieved from: http://www.towes.com/media/43743/bvc%20mod%201%20unit%204%20july.16.p.pdf

Retrieved on November 20, 2017.

In addition to the fact that relationships take time to build the above questions reinforce that establishing *common interests*, and empathy towards someone's work, position, needs and are necessary. This is called ***rapport,*** by being open and listening and establishing that you care about what is being communicated. Once you build rapport you are looking to maintain a level of ***authenticity***, *which is you actively want to engage and maintain your connection with the other person and* work at continuing lines of communication that are *regular and ongoing.* When you allow the time for growth of these two stages, people will want to work with you and keep you engaged through effective communication bringing you to a productive relationship**.**

Thus, the cycle of building productive relationships follow these steps:


(Building Rapport Image © Bow Valley College 2018)

## Learning Activity 3.2: Improving your Work Relationship Technique

### Directions

1. Consider the material from this unit and reflect on the cycle for building productive relationships below.
2. Review the Practical Steps to *Improve Work Relationships* list
3. Respond to the questions for consideration

Reflect on the questions under each step.

**STAGE ONE**

**Building Rapport**

**Establishing Communication**

1. What common interests and needs do we share?
2. How you can help each other's work?

**REMEMBER**

1. Be genuine and inviting
2. Set aside time for relationship building
3. Show genuine interest in building a relationship

**STAGE TWO**

**Authentic Engagement**

**Maintain, Improve, and Grow**

1. How am I maintaining and growing my communication with this person?
2. What current needs or interests do they have that I can contribute to?
3. Is the level of communication mutually beneficial? If not, how can I strengthen it?

**STAGE THREE**

**Productive Relationships**

**Capacity for Effective Collaboration**

1. What strengths does this person contribute to my work?
2. How can I enable this person to capitalize on this contribution?
3. Can this person help my work now? In the future?
4. How do I listen to their concerns?

While working on a social project, improving your relationships with the people you are implementing your project with can go a long way to gaining interest and good will for your project, as well as establishing trust. Recognize that a team at all levels of a team can be a powerful voice for your project.

While early communication and relationship building can contribute to the success of a project. It is important to know that *it is never too late* to start developing work relationships. Steps you can take to start this process are described below:

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| PRACTICAL STEPS TO IMPROVE WORK RELATIONSHIPS | |
|---|---|
| **1. Have a Positive Attitude** | Try to avoid negative thoughts or topics of discussion. Make sure not to be judgemental and be accepting of other people's ideas and attitudes. |
| **2. Do not jump to Conclusions** | Try to gather as much information as possible before reacting to a negative situation. Know the difference between responding to a situation and just "reacting" to one. Give people the benefit of the doubt if you are unsure. |
| **3. Deal with conflicts as soon as possible** | When a negative situation or misunderstanding happens, do not just leave it alone. Try to deal with and resolve the issue as soon as possible. Make sure to be direct and courteous but respect the other person's feelings or position on the matter.<br>Work together to try to resolve the issue, come to a compromise if needed. If in a work situation don't forget to bring up the issue to a supervisor when appropriate. |
| **4. Improve your communication skills** | Improving your communication skills is something everyone can do as an activity of lifelong learning.<br>Make sure that you are listening carefully to a speaker's message, and that you try not to interrupt when it is not your turn to speak. Make sure to repeat back what you have heard to the speaker in your own words to reinforce that you are hearing what the other person is saying. |
| **5. Try to see things through the other person's eyes** | When building positive relationships with others try to see things through the other person's eyes.<br>Everyone has his or her own unique life experiences and knowledge. Be respectful of what others bring to the table. Try to be empathetic to life challenges others may face that you may not know about. Sometimes people react negatively to stress. A negative reaction to you may not actually be about you. If this happens try to 'respond' to the conflict with respect and empathy for unknown factors. Life can be difficult for all of us sometimes! |

Content from: TOWES Goal Planning Essentials Workbook Unit 4: Ensuring Project Success, p. 5. Retrieved from: http://www.towes.com/media/43743/bvc%20mod%201%20unit%204%20july.16.p.pdf Retrieved on November 20, 2017.

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## Questions for Consideration:

1. Establishing productive working relationships and communication can help you avoid barriers to project success: List 2 barriers that you can avoid that you've learned in this topic.

2. When building productive work relationships what are at least two key aspects of communication you should consider?

3. What lessons learned from making stakeholder connections can you transfer to establishing rapport and building relationships

4. When you think about the practical steps above? Can you place these steps into the cycle of building productive working relationships? What would you place where?
    a. Building Rapport
    b. Authentic Engagement
    c. Productive Relationship

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## The Importance of Feedback: Listening to Everyone

**Social Innovators on the Ground Say**

" As frontline employees we are not coming together as a whole and talking about challenges. Which I think would be beneficial."

If you look through the *Practical Steps to Improve Work Relationships*, one way of ensuring you can incorporate the steps by providing the opportunity to provide quality feedback on how things are going, to touch base and provide an opportunity to improve.

Specifically, the goals of feedback can be seen as an opportunity to:

1. Deal with mixed messages if you are not communicating with your team directly.

2. Help you not jump to conclusions about the project and your team.

3. Deal with conflict that might arise from mix messages.

4. Improve your communication skills with your team.

5. See things from the perspective of others, and

6. Help your team and you as a leader stay positive.

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# Learning Activity 3.3: Feedback Technique

## Directions

1. Reflect on the provided questions

2. Respond to the questions for consideration

If you were to run a social innovation, how would you ensure you were communicating a consistent message to everyone involved in your project? How would you invite others to provide constructive feedback?

Let's start by looking at a few questions:

1. Do I regularly hear from all levels of the project?

2. What am I hearing from each level?

3. How does each level see the project?

4. What are their difficulties/ successes?

5. Do these messages conflict? If so how can I resolve this?

6. How do I invite feedback?

7. What ways can I ensure feedback gets to where it needs to go?

8. How can I improve the morale of my team?

## Questions for Consideration:

1. How do the feedback questions address the practical steps for improving communication?

2. Thinking about a positive work relationship that you have currently or in the past. Did the opportunity for feedback play a role in that positive relationship? How?

By recognizing the people who are really driving your project and regularly assessing strategies to engage them in meaningful ways, you can benefit greatly from their experience and feedback. Those connections can greatly improve the chance of success for your social innovation, and can become invaluable for maintaining impact and sustaining your project—a topic you will explore next.

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## Topic Learning Checklist

| Can you identify? |
|---|
| ☐ List and understand the 3 different stages of work relationship building presented in the unit. |
| ☐ List the 5 things you can do to improve your working relationships. |
| ☐ Be able to reflect on what has made an effective or non-effective working relationship from personal experience. |
| ☐ Identify key strengths each member of a project team can provide |
| ☐ Be able to list reasons why feedback might help you improve communication and build relationships with your team. |

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# Topic Three: Communicating to Sustain your Project

So you've done good work, and your project is coming to a close. What happens now? The need for your project still exists, but you might not have the money or capacity to keep the project going. This is a dilemma often faced by social innovators. What are some ways we can help the ideas and impacts of your project stay alive?

**Social Innovators on the Ground Say**

" I would hate to see after this funding ends for the project to be done. I think we have come a long way and we have done a lot of great things and I would hate to see that be over. "

One of the key concerns for social innovation projects relates to the concepts of **sustainability** and **scalability**. Basically, sustainability refers to the ability of a project to continue to run effectively. Sometimes (and perhaps more often than not), a project will have a limited lifespan. This is sometimes OK, depending on the kind of project and its outcomes. However, if you think your project has merit, and the evaluation that you have conducted indicates that it was to some extent successful, you might want to think about how you could contribute to its sustainability.

Scalability refers to the ability of a project to be copied or adapted for other populations, communities or settings. For most beginner social innovators, this may not be a primary concern. However, if you effectively communicate the outcomes of your project, you will be increasing the probability that someone will be able to learn from your experience and perhaps initiate a similar project at another time or another place.

How do you get others to take note of what you have done and want to help you expand your project? Through communicating some of the key points from earlier in this module, such as:

1. The problem you wanted to solve (Unit One)

2. The input and genuine engagement from stakeholders that guided your thinking how you planned and implemented (Unit One)

3. Your project goals (Unit Two)

4. The results of your evaluation (Unit Two)

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Keep in mind that effectively communication does not have to be long. Depending on who your audience is, they may only have a short period of time to devote to your message. However, you still want your message to be impactful.

Potential audiences:

1. Project stakeholders
2. Community stakeholders
3. Readers of your project report
4. Presentation audiences

As you learned to engage with stakeholders, you might want to present your message as part of your communication plan, or as an end of project summary or presentation.

But how do you distill your project down to a summary? Let's take a look.

## Writing a Project Summary

One important part of getting your ideas across is to be able to relay information of what you did and why it is important. This is true whether or not you are putting together the final report or were just asked to summarize what was done. One way to do this is through giving a summary. How do you do this? First keep in mind that a project summary is an effective way of communicating with stakeholders, both current and future. It is a way of explaining your project, its evaluation, and suggested next steps.

1. Many project summaries are fewer than 400 words long, because the purpose of a summary is to review the project for potential readers from a variety of backgrounds. Use plain language, avoid acronyms, and be as clear as possible, avoiding professional jargon.

2. A project summary is used to succinctly explain the project's importance to your audience. It should focus on specific outcomes and findings, highlighting any outcomes that may affect the audience. Keep away from additional questions raised by the project for the synopsis, but a synopsis can be used as a starting point for brainstorming about the possible next stage, such as sustainability and/or scalability.

| **1. Introduction**: What was the problem that your project sought to address? |
| --- |
| **EXAMPLE:**<br><br>Unfortunately, many Calgarians are unable to afford to buy food, and the lineups at the food bank are so long that often people (including children) find themselves waiting in line for over 2 hours. This includes mothers with young children. The food bank is planning to expand their location and services, more space, more volunteer, and more food – but this plan won't be implemented for at least one more year. These conditions cause considerable stress for families who require assistance from the food bank. |

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**2. Description of Project:** What, where, when, and how

**EXAMPLE:**

We received permission from the city to use the public space outside the food bank to set up a number of "mini shelters" with a few picnic tables covered with portable "umbrellas". The tables will have hot drinks and a few toys for the children to play with while they are waiting. *When:* We will be providing this service twice a week for the duration of our practicum. *How*: The hot drinks are donated by a local coffee shop; and the tables are staffed by student volunteers. Toys are donated by students at the college. We worked in pairs: two students were responsible for acquiring donations and getting permissions required, and two were responsible for recruiting student volunteers.

**3. Evaluation:** How do we know?

**EXAMPLE:**

During our three-month practicum, we provided this service to over 200 families. We interviewed all the volunteers, using an interview method to find out what feedback they got from the families. All volunteers participated in a one half-hour interview and feedback was overwhelmingly positive – families expressed their appreciation in multiple ways, and volunteers felt that they were making a valuable contribution.

**4. Next steps:** Relaying hopes for sustainability and scalability

**EXAMPLE:**

We are hoping to find a way to keep the service going with volunteers at the end of the practicum, and possibly to extend it to 5 days a week from 2 days a week. We will be starting to do brainstorming sessions with the student association, the volunteer center, and current and potential donors.

See how you've ended by communicating what your plans to keep going with the project? If you've created interest in your project to those that could help you, this will create an opportunity to talk more about your project and its future.

Do you have a plan? Likely ways the intent of your project can continue?

The information in your summary can easily translate into a short project presentation.

Note that not all projects will continue, but if you communicate your project well, it will set you up for future innovation projects that will allow you to start a new project with the steps in this module while understanding the value of socially innovative thinking.

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# Learning Activity 3.4: Communicating Impact Technique

## Directions

1. Read over the steps for creating a project summary. Use a current project you are working on, reflect on the work you have done in the other units, or find a project to write a summary for using OpenIDEO Stories in the supplementary resource section.
2. Write a short summary of the project, being sure to include all steps:
3. Use the template below to help you organize your ideas.
4. Reflect on your experiences using the Reflection Technique.

| PROJECT SUMMARY WRITING TECHNIQUE | | | |
|---|---|---|---|
| **Step** | **Section** | **Response (3-5 Major Points)** | **Written form** |
| **1.** | **Audience and Purpose** | | |
| **2.** | **Introduction to the Problem** | | |
| **3.** | **Project Description** | | |
| **4.** | **Evaluation based on Goals** | | |
| **5.** | **Next Steps** | | |
| **Put it all together: Write you summary** | | | |
| | | | |

| PERSONAL REFLECTION TECHNIQUE | |
|---|---|
| **Why you went through the effort of the project?** | |
| **Communicate why you're still passionate about the project?** | |
| **What you learned/ what surprised you?** | |
| **Why it should continue and your ideas for the future?** | |
| **How will you provoke ideas from your audience?** | |

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# Questions for Consideration:

1. How might writing a summary help your motivation to continue the project?

2. Which step of the summary writing do you think is the most important?

3. Once you've reflected on a project can you imagine starting another project?

4. What potential audiences would be more interested in:
    a. your project summary

    b. your personal experiences

    Did a. and b. differ?

## Topic Learning Checklist

| Can you identify? |
| --- |
| ☐ 3-5 major points for each step of the summary writing process? |
| ☐ Why it is important to include the next steps information despite your project being completed? |
| ☐ Why it is important to reflect on your project? |

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# Recommended Performance Evaluation 1: Unit Reflection

## Directions

1. Go back to the Learning Activities and Topic Learning Checklists in the unit to review
2. Answer the following questions based on each topic

Topic One:

Given the emphasis on planning with your stakeholders. Do you think it is important to stick to your stakeholder communication plan, or leave room for non-planned interactions and connections?

| |
|---|
| |

Topic Two:

What are 3 important lessons about maintaining working relationship that you've learned through the topic material?

| |
|---|
| |

Topic Three:

Did reflecting on your project add to the major points for you to include in the discussion of your project as a whole?

| |
|---|
| |

Thinking Broadly:

Can you think of ways that you have utilized all the information you have gathered through the previous units in this module in writing your summary?

| |
|---|
| |

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# Recommended Performance Evaluation 2: Discussion

## Background Information

Now is the opportunity to discuss the things that you learned and found interesting from the unit. Please discuss with your classmates in the discussion forum. If you are learning elsewhere you can discuss what you have thought about with a friend, mentor, or colleague.

## Directions

1. Make a post in the Unit Three Discussion forum that includes answers to:

   a. Given what you have learned in this unit, does the importance of communication for the success and continuation of a project surprise you, and why?

   b. Recall the cycle of building productive relationships:


(Building Rapport Image © Bowe Valley College 2018)

   Which do you see as the most important stage of relationship building for a social innovation project, and why?

2. Discuss with your peers any learnings related to communication and relationship building that you will use the next time you are working with others.

# CONGRATULATIONS!

**You have Completed Unit Three.**

## Supplementary Resources

Social Innovation on the Ground: Accessible and Evidence-Based Tools for Social Innovators. Final Study Report.

Topic One: Planning to Work with Others:

NESTA DIY Toolkit: Partnership Map Retrieved from: http://diytoolkit.org/tools/building-partnerships-map-2/ Retrieved on: November 20, 2017

Topic Three: Communicating to Sustain your Project

Bow Valley College (2015) TOWES: Research Essentials Unit 4: Presenting Information. Retrieved from: http://www.towes.com/media/43767/bvc%20mod%202%20unit%204%20july.16.p.pdf. Retrieved on: November 20, 2017.

IDEO: OpenIdeo Stories. Retrieved from: https://stories.openideo.com Retrieved on: November 20, 2017

Note: Care was taken to provide supplementary materials that are from established sites. External links are not maintained by Bow Valley College and may become broken over time.

## References

Adaptations

People and Connections Technique:

NESTA DIY Toolkit: People and Connections Map adapted from: http://diytoolkit.org/tools/people-connections-map/ Retrieved on: November 20, 2017.

NESTA DIY Toolkit: Target Group Adapted from: http://diytoolkit.org/tools/target-group/ Retrieved on: November 20, 2017.

Work Relationship Evaluation Questions:

Bow Valley College (2015) TOWES Goal Planning Essentials Workbook Unit 4: Ensuring Project Success, p. 4. Adapted from: http://www.towes.com/media/43743/bvc%20mod%201%20unit%204%20july.16.p.pdf

Retrieved on: November 20, 2017

Practical Steps for Improving Work Relationships:

Bow Valley College (2015) TOWES Goal Planning Essentials Workbook Unit 4: Ensuring Project Success, p. 5. Adapted from: http://www.towes.com/media/43743/bvc%20mod%201%20unit%204%20july.16.p.pdf

Retrieved on: November 20, 2017

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