

“Working Together to Make a Difference”
National Community Investment & CSR Forum
May 31 to June 2, 2006 - Winnipeg, MB
Evaluation Form

47 surveys completed out of a possible 144. (33% return rate)

1. The most value I received from the Forum was (check all that apply):

41 presentations, especially

- Kate Daley, Co-op Bank (20)
- CSR 101 (8)
- Vancity
- Enterprise development
- Natural Step
- Sharing stories of collaboration
- Environmental leadership (3)
- Chad Park, Denise Taschereau and Sue Godey were excellent!!
- I liked all
- SRI (2)
- Story telling ones – housing and enterprise development (3)
- Sharing CSR & CED Innovations in Credit Unions (2)
- Quint Development Corporation and the Saskatoon Credit Union model

31 networking with:

- 15 Co-operative representatives
- 20 Credit union representatives
- 21 Community investment representatives

Other:

- CED experts
- It was all good
- Government representatives
- Increase in knowledge & approaches and what is working
- Great rhythm to the event – lots of talk time – good job
- Checking out the displays & materials

2. Did you meet others at this Forum who may act as future supports to you in your CSR or community investment work?

44	94%	Yes
2	4%	No
1	2%	Not applicable

3. How valuable was it that we combined a community investment and CSR Forum into one event?

35	74%	Very valuable
11	23%	Somewhat valuable
0	0%	Not valuable at all
1	2%	No answer

Comments:

- If not combined, I would have had to attend one or the other, not both due to travel costs
- Helpful to form closer ties between groups
- Opportunity for building partnerships. Increase awareness with established co-ops & CU's of the energy and capabilities of the community investment organizations and the important needs that they serve
- I thought seeing the links between CED & CSR was very inspiring and it is important to see the connections instead of treating them completely separately
- A great strength of this Forum was that it brought together CU & Co-op people and social activist-oriented groups
- The diversity of perspectives, ideas and initiatives was greatly enriched by combining these events
- Brilliant idea – come together with (soft) agenda – promote CSR & in process meet people, make relationships – act together. This is how learning happens best - do something together, reflect and act.
- Better knowledge of where to go to get financial support for CED projects and strategies for including CSR in everyday thinking
- Community investment is great, but is not synonymous with CSR & can confuse the issue. In general, though, there were lots of common interests.
- The majority of valuable input for me came from individuals of other CU's
- Educating folks about the network and what's behind it
- Too geared to credit unions and lending. Need more on the cooperative side of things
- A CSR Forum for credit unions only would be more valuable – define community investment – CED or philanthropy. Give more room on evaluation form for comments.
- Good cross-fertilization/ideas
- Brings organizations together where specific partnerships can be established (ie. credit unions can partner with community investment organizations as part of CSR/SRI strategy)
- Very helpful to meet counterparts and share information of common concern
- The two seem to run together – we should be investing in CSR companies/co-ops
- Community investment is key to building capacity in communities and promoting CSR values
- We are all in the same game
- CCINC organization provides an opportunity to hear CSR in action
- Very strategic Forum. I didn't meet a lot of people, but met key people for my field
- We need to be working together more. These Forums forage the networks
- Our goal is to have CSR involved in all CU activities, operations and our strategy is to slowly introduce CSR through our new community investment initiative.
- The event was very different and unique for me
- Because of the possibility of meeting other developers and organizations involved in investment

4. Please rate the following:

	Poor	Average	Very Good	Excellent
Presentations/workshops	0	9	27	11
On-line registration	1	2	20	19
Brochure & meeting package	0	7	28	11
Physical setting (hotel, meeting rooms)	6	20	17	2
Social events	2	3	18	11
Overall Forum	0	2	29	14

Comments:

- Content of presentations was very good. Organization and structure of workshops was weak
- Particularly enjoyed Kate Daley's presentation
- Hotel – poor internet; no herb tea; food had lots of sugar; showers were hot/cold
- Outstanding preparation of brochure, meeting package and on-line registration. Well done!
- All marks would be excellent if we consider this is the First Forum

5. My recommendation(s) to IMPROVE future Forums would be:

- Set up better microphone capacity
- Keep growing!
- None – my congratulations to organizers
- Invite more people and be more inclusive
- Better venue. CD of presentations
- Use a nicer hotel
- Greater variety in workshops
- Really liked cooking school dinner (WECC night) & entertainment
- More outdoor “social” events
- Information re: dress for social events and local co-op tours. Information re: local restaurants, map, etc. for when on own for meals. Choose a hotel that has a restaurant within it
- Share facilitator tasks among more people. Ask everyone to introduce themselves prior to speaking - this assists with getting to know on another
- Would be more valuable to separate funders and receivers of funds
- Expand the number of participants to include more local co-ops and CU's
- More time for questions at workshops. More on community investment aspect
- Some workshops were hard to follow – power point outlines would be helpful at the very least. Full power points would be better. Some speakers seemed to ramble (some topics seemed to ramble) and I lost the point.
- Don't worry much about entertainment – people want to talk to each other. Implement a more structured process for meeting strangers and networking (carrousel, speed dating, etc.)
- Have some free space in between - the days were a bit too packed, though you guys had wonderful events!
- Interpretation equipment was problematic on first day
- Outdoor evening event, and an indoor location like West End Cultural Centre as a back-up in case of poor weather
- Poor hotel rooms. Get rid of bilingual sessions - should all be in English. Poor supper and entertainment at West End Cultural Centre
- Please have the Power Point presentations available if not during, then after the presentations on disk, not paper copies.
- Hotel rooms were very poor. The meeting rooms however, were great. I would have preferred somewhere closer to amenities (shopping, restaurants, etc.) Loved the event at the cultural centre.
- Translation – poor quality and fairness from French to English.
- More co-op food and fair trade coffee where possible. More information on double sided paper
- Have the program online too. Not just the registration forms.

6. What sector are you from? (please indicate all that apply):

15 Co-operative
 19 Credit union
 12 Community investment
 4 Government
 2 Other

7. The best time of year for me to attend a future Forum is (please indicate all that apply)

4 Summer
 11 Fall
 8 Winter
 25 Spring

Specific month:

- June (6)
- Any month but April
- May (7)
- November
- Late September
- October
- December
- January
- February (2)
- April (2)
- March
- Many happen in the spring
- Lead time is more relevant than season

8. Should future Forums be:

1 One day
 33 Two days
 12 Three days
 2 Other

Comments:

- Including CCINC meeting/Forum
- To travel for fewer days doesn't make sense
- Three full days is a bit long
- No longer than 2 days
- Two full days, with extra day for specific CCINC training/sharing
- Three days if all groups part of event
- The length was good
- Weekdays not week-ends
- Depends on content
- Length was fine – depends on agenda

9. Please indicate what topics you would like future Forums to cover:

- CSR engagement
- Don't just go in the direction of advocacy – it can be part of your purpose, but focus on positives!
- Measuring employee engagement
- Alignment to strategic direction, member engagement
- Youth engagement, member engagement
- Engaging employees, directors, community
- Maybe an opportunity for regional workshops
- Common goals, common values. Youth engagement, fair trade (both domestic and multi-national)
- Thank-you
- Benchmarking
- How to conduct a CSR audit, preparing a CSR plan
- Influence over government (provincial and federal) over core funding for co-ops to open funding possibilities to support core business functions
- Investing in underserved communities, increased dollars for CED, how to reach the ethical consumer
- Continue with best practices in community investment and CSR
- Education (community and college) and co-ops and credit union joint efforts
- Donations, sponsorships, measurement of community investment success. Something geared to board members
- Very practical examples of what other community minded people are doing
- Employee education, CSR tours, gender issues
- CSR reporting, building CSR strategies; strategic community investment
- CSR 101 should be offered to credit union and co-op AGM's
- Topics were appropriate – need updates on successes/set backs – need information on how national collaboration can develop a national report on contribution of CU's and co-ops to CED & CSR research. Funding for "After Care"
- Detailed "how-to's" of establishing CSR programs, program management, measurement, marketing, evaluation, reporting
- More development, affordable housing, how to do CSR
- A session specific to community loan funds would be helpful dealing with the particular issues, challenges and opportunities faced by them
- Let's go to Quebec! – and see different forms of organizations in action! Not sure if annual meeting is practical
- Approach for organizational change with CSR; unique CSR opportunities for co-ops/CU's; multi-sector examples of approaches – insurance, worker co-ops, CU, agricultural co-ops, Elevator co-ops, etc.
- Communicating CSR activities internally and externally. Build a template, business case for CSR for credit unions (national). Please have presenters distribute their Power Points to participants!!! Extremely valuable
- Need to be a little more focused on what the topics are. Have presenters that are involved in the administration of programs not just the spokespersons. I appreciate the Forum for ideas, now our CU has the decision of what to do with the ideas. Topic – Credit Union Foundation.
- How to effect change in politics and regulations
- The practical terrain – the difficulties encountered by meeting the clients needs. Exchange of ideas.