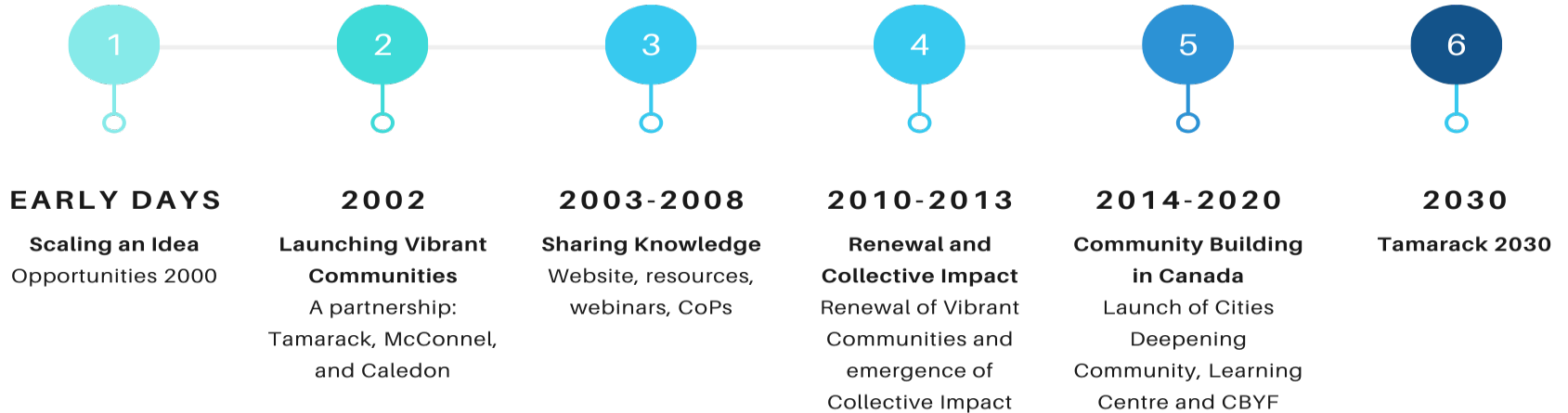




Tamarack's Past and Present

History - TAMARACK'S TIMELINE

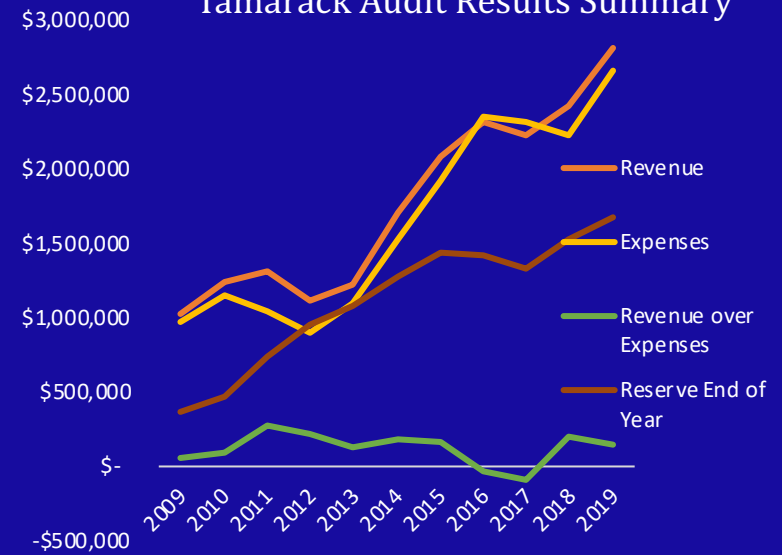


History – BUSINESS ANALYSIS

Why have we been a financial success?

1. Learners/clients/members invest in our work
2. We maintain a mix of revenue sources
3. We fundraise in 5-year cycles/bold visions
4. Our wages are good but middle range
5. Our reserve fund allows us to innovate
6. We Love our donors and members
7. We budget realistically, tightly control spending
8. We have good financial controls and hire an auditor that knows charities.
9. Tamarack leadership manages money well.

Tamarack Audit Results Summary



Revenue – Average – by source

Learners/Clients/Members	58%
Donors/Foundation	33%
Government	24%

Vibrant Communities

5 Risks facing Vibrant Communities	5 Opportunities for Vibrant Communities
<ol style="list-style-type: none">1. National and Provincial Priorities shift away from poverty reduction due to Covid 19 recovery2. Leadership changes at different levels in the VC network means shifting priorities and capacity3. Decreased money available from foundations to support the local and national work4. City Fatigue due to COVID 195. Overshadowing interest in Climate Change and Pandemic's creates a "some need to be left behind" mentality	<ol style="list-style-type: none">1. Growth in B.C. where the Province has invested \$5 million to support poverty reduction strategies2. Growth in the U.S.A. including a 10-city learning community3. A National Deepening Community Strategy that will replicate the federal poverty strategy4. Communities Building Youth Futures is a five-year initiative5. Transition Places and Pathways with McConnell could allow us the opportunity to grow collective impact to address climate change

Learning Centre

5 Risks facing the Learning Centre	5 Opportunities for the Learning Centre
<ol style="list-style-type: none"> 1. Increased competition offering workshops and consulting services 2. Changing nature of Tamarack learners with far more segmentation in our learner profile audience 3. Decreased money available for learning activities post-COVID 4. Increased number of available online learning opportunities 5. Decreased available funding for consulting services 	<ol style="list-style-type: none"> 1. Learner engagement - Only 1 in 5 members access workshops now 2. Promote consulting services more intentionally and externally 3. Better market segmentation can lead to learning products which meet diverse needs 4. Create strategic partnerships to increase reach and scope of our work 5. Continue to focus on the 5 interconnected practices to differentiate Tamarack's product line

Communities Building Youth Futures

5 Risks facing the CBYF and Tamarack	5 Opportunities for the CBYF and Tamarack
<ol style="list-style-type: none">1. Given the financial pressures the Federal Government is facing due to COVID-19, funding may not be provided to the second and future years of the CBYF project2. The small to medium-sized communities identified by ESDC do not have the capacity3. Funding communities will require Tamarack to ensure that deliverables are being met4. Staffing costs are higher than anticipated which requires adjusting budget lines5. Tamarack does not have expertise in supporting and delivering programs specifically to youth	<ol style="list-style-type: none">1. Tamarack has limited experiences supporting small to medium sized communities2. The CBYF will enable integration across Tamarack teams3. This is an opportunity to test the collective impact approach with a youth focus4. New partnerships through engaging with Governments, the National Collaborative, and communities5. New funding opportunities might emerge as Tamarack engages in proof of concept

Transition Pathways

A PROPOSAL

Through the McConnell Foundation and Tamarack Institute alliance in addressing the climate change transition in the next five years:

1. 500 municipalities will be represented by action plans to reduce poverty and 1 million people will move out of poverty (reducing Canada's poverty rate from 9.5 % to between 6% and 7%,).
2. 300 municipalities will include Transitions work in their poverty reduction strategies
3. Canada's narrative will move from reducing poverty to Ending Poverty
4. 50 Cities will develop Transition Pathways and Places projects involving 5,000 citizens
5. A 100 city CoP will advance Transition Pathways and Places



Analysis

DE Sprints
Key Informant Interviews
Learner Survey

Developmental Evaluation Sprints

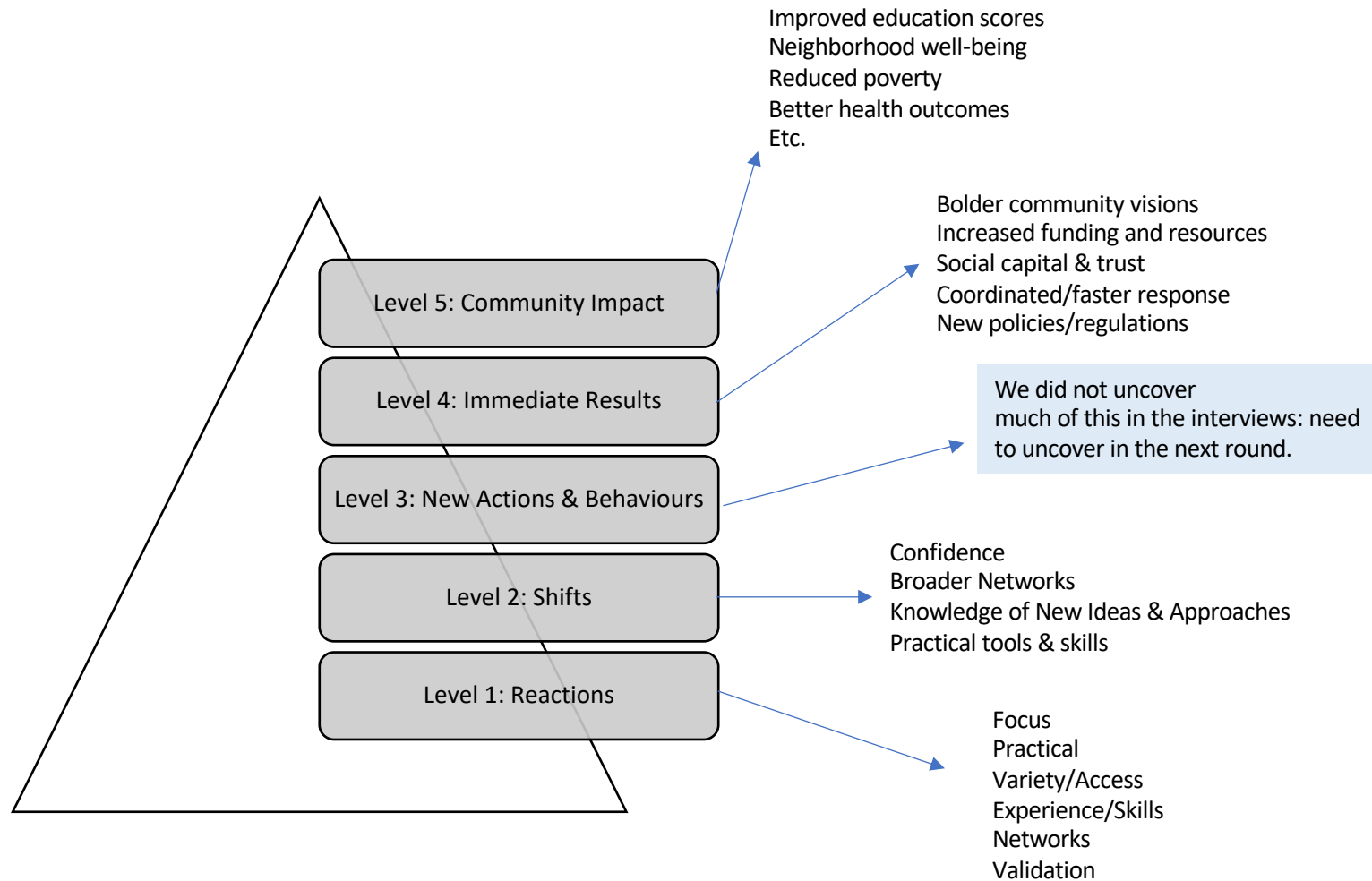
The Original Workplan & Progress

Sprint		Q1	Q2	Q3	Q4	Partially Complete	Notes
LC	Learner Persona/Journey					Partially Complete	7 Personas, with 12 attributes, completed; next steps tbd.
	Positive Deviant Study					Complete	Interviews completed: nuanced feedback on 'outcomes' and 'value'.
	Competitor Analysis				delayed	Complete	Three analyses completed: some insights opportunities for partnership
	Engagement/Marketing Report					Not Started	Requires review of Learner, Competitor and Positive Deviant studies.
VC	VC-CRP Getting to Impact Project					Complete	Six month series complete in 2019.
	VC-CDC Outcome Framework					In Process	Six month webinar/workbook series designed & scheduled for 2020
	VC-CRP Outcome Report					In Process	Staff gathering city reports: timelines adjusted for April production.
	VC-CDC Outcome Report					Not Started	Scheduled for after webinar series.
Joint	ESDC Reporting					Complete	Review complete: ESDC satisfied; future challenge in outcome tracking.
	Enhanced ¼ Engagement Report				delayed	In Process	100 % staff provide feedback: feedback summarized; next step tbd.
	Cross Division Participant Journey					Not Started	Leads not assigned: awaiting insight from Learning Center sprint.

Conclusion Highlights

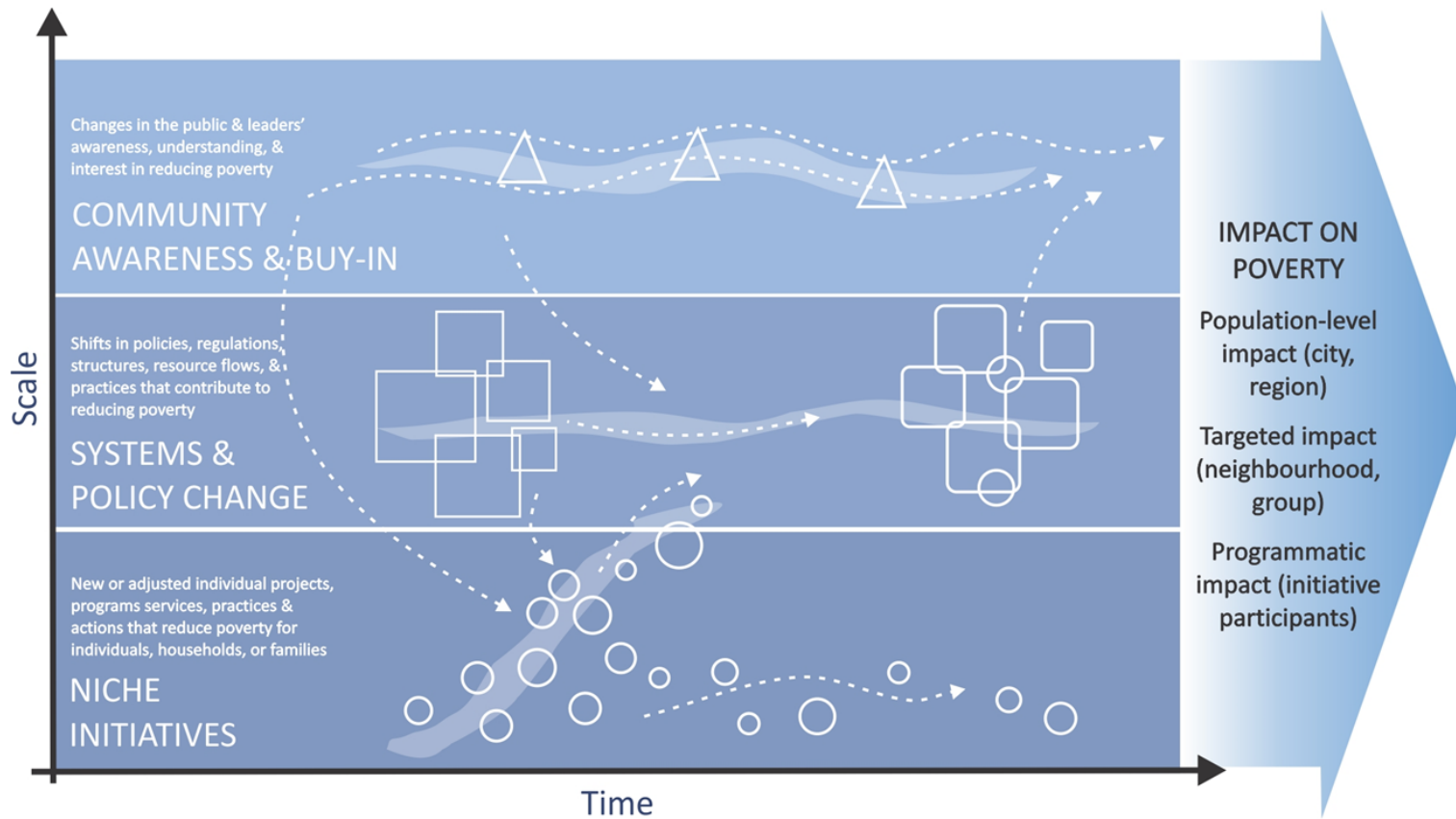
Learning Center	<ol style="list-style-type: none">1. We have a sharper - but still not sharp - understanding of our learner personas, positive deviant outcomes and competitors: we need to go deeper to learn more.2. The emerging design challenge is “How can we create ‘generalized supports’ that are relevant & effective for a large number of people while targeting those supports to different learners and competitive markets in an efficient and profitable way?”
Vibrant Communities	<ol style="list-style-type: none">3. We now have a coherent outcome framework, with a good starting-point support package (webinars, workbook, coaches), for CRP based on the Multi-Level Perspective, and are now adapting it for DC.4. The framework can be adapted for the different capacities of communities.5. We are about to test the usefulness of frameworks for reporting and strategy development at local and Tamarack level.
Joint Reporting on Initiatives	<ol style="list-style-type: none">6. We can monitor and report activities and outputs with relative ease.7. We have improved our capacity to articulate and report on “outcomes and impacts” (but not yet covered “insights”).8. Our capacity to make sense of data, dig deeper, and use the results for reporting, marketing and adjusting strategy/design is still underdeveloped.

Elaborated Framework



Vibrant Communities - The Framework

Multi-Level Framework





Analysis

Key Informant Interviews
Learner Survey of the Learning Centre

Key Informants - Tamarack Niche

“Do what you do best – deepen your approach / model of HOW you work with communities and bring the approach to new conversations”

- **Situational analysis** for ongoing identification of system challenges (micro-meso-macro) that may impact sustainability
- **Ongoing policy assessment**: What kind of policies are needed to have impact we want to have; what will policy integration look like from local to national contexts?
- **Consider strategic questions** i.e. “Let’s get sharper about” how to...
- **Broaden method / approach** to expand impact
- **Focus on existing efforts** to deepen impact
- **Sustain existing impact** (in the face of changing external context)
- **Geographical focus**: Change (broadening) vs sustaining (deepening) agenda

Key Informant Interviews

Tamarack's approach to community change

- Collective Impact is a “sweet spot” which continues to be relevant and responsive to needs
- Continue to build on Collective Impact through new understanding and innovations that address needs – will enable ongoing model adaptation
- Tamarack model of convening, catalyzing, brokering knowledge is critical, “now more than ever”
- Best approach – amazing impact - that accommodates diverse contexts/ needs – highly adaptive

Key Informant Interviews

On Being Strategic

- **How will we manage growth?** How will we manage scope creep? How will we balance demand and new opportunities with deepening and sustaining impact where we already work?
- Is it time to start considering the gaps and **targeting the work** in terms of systems change?
- A ToC would be helpful to support organizational learning and direction.
- **Being more strategic** (getting good information about how well you are doing / change you are impacting in specific areas over time and what you need to adapt to target gaps).
- We need to be able to say **what is in and outside of scope** if we want to deepen and sustain our efforts. This would also allow for us to say “NO” to things that are less impactful and less important to mission achievement”

Learner Survey – Summary of Findings 1

The following are key highlights of the survey findings:

- The vast majority accessed Tamarack's learning resources in the past five years
- Community Engagement, Collective Impact and Evaluating Community Impact were the top three areas
- Participants were more apt to describe themselves as a practitioner in the field of community change
- Participants have a multitude of learning interests, although topping the list were tools and anything practical they can apply directly to their work
- The services and supports met participants' needs to varying degrees
- Tamarack Institute's learning resources, followed by its webinars and workshops, were viewed as most effective
- Participants were widely confident that Tamarack Institute's services and supports have assisted their organization in an array of areas
- Tamarack Institute's model and approach was considered largely relevant

Completely/Mostly Agree Among Those Expressing a Definite Opinion	Completely/Mostly Agree
Expand skills and tools to address change	93%
Develop new approaches or ways of thinking to address issues	90%
Develop awareness of issues you/your organization are trying to address	89%
Become more knowledgeable and confident in addressing change	85%
Deepen community change	80%
Develop new ways of working with partners	80%
Develop new relationships, networks and partnerships	78%
Address poverty reduction	74%
Accelerate and/or amplify change	71%

Unique Offerings

Unaided Mentions

20%	Variety of resources/tools
17%	Wide network/Partnerships/Collaboration
15%	Knowledge/experience on specific topics
13%	Focus on community development/change
11%	Learning opportunities/Webinars
3%	New/different perspectives/ways of thinking/doing things
2%	Good reputation
13%	Other
2%	Nothing
19%	Don't know

Q.B21: What does Tamarack Institute offer that other organizations do not offer? (n=94)



Questions and Discussion