

STEPHEN T. MONTAGUE

Partner

EDUCATION: B.A. (Honours) Public Administration, Carleton University (1980)
M.P.A., Carleton University (1983)

**PROFESSIONAL
AFFILIATIONS:**

Canadian Evaluation Society
American Evaluation Association (Research, Technology, and Development Interest Group)
Performance and Planning Exchange – (Founding Board Member)

**RECENT
PRESENTATIONS:**

Innovation in Results Management at the Canadian Cancer Society, April 15, 2009 http://www.ppx.ca/PPXevents/Archive/April15_09/CCS-Eng.pdf
University of Edinburgh Summer School for Health Scotland on Impact Evaluation, May 2008
<http://www.chs.med.ed.ac.uk/ruhbc/evaluation/summerschool2008/index.html>

Canadian Evaluation Society, Panel Presentation, Evaluating in Complexity, May 2008
[http://pmn.net/library/w45%20Results%20Logic%20for%20Complex%20Systems%20\(May%2013%2008\)%20\[Read-Only\].pdf](http://pmn.net/library/w45%20Results%20Logic%20for%20Complex%20Systems%20(May%2013%2008)%20[Read-Only].pdf)

Government of Nova Scotia: Regulatory Craft Conference, November 2007
www.gov.ns.ca/enla/regulatorycraftconference

**KEY
PUBLICATIONS:**

With George Teather, *Evaluation and Management of Multi-departmental (Horizontal) Science and Technology Programs*, Research Evaluation, September, 2007

With E. Allerdings, *Building Accountability Structures into Agri-Environmental Policy Development* Evaluating Agri-Environmental Policies: Design, Practice and Results, OECD, 2005, pp 55-70

The Wisdom of Crowds: A Better Measure of Performance, Canadian Government Executive, December 2004 / January 2005, Volume 10, Number 6, pp 20-21

With Gail Young and Carolyn Montague, *Circles Tell The Performance Story*, Canadian Government Executive, 2003, Issue 2, pp12-16.

"Focusing on Inputs, Outputs, and Outcomes: Are International Approaches to Performance Management Really So Different?" The Canadian Journal of Program Evaluation, Volume 15, Number 1, pp. 139-148, 2000.

The Three Rs of Performance: Core concepts for planning, measurement, and management, Performance Management Network Inc., 1997.

With George Teather, *Performance Measurement, Management, and Reporting for S&T Organizations – An Overview*, Journal of Technology Transfer, Vol. 22, Summer 1997, pp 5-12.

Refocusing your Questions: Establishing the Strategic, Tactical, and Operational Requirements for Better Business Planning, FocuS, Volume 5, Number 2, 1996.

BACKGROUND:

Steve Montague has over 27 years of experience in performance measurement, program evaluation, market research, review and audit projects as a management consultant and as an evaluation manager in a major federal government department. Mr. Montague has managed major projects analyzing a wide variety of programs and provided specialized workshop assistance to Canadian federal, provincial, United States, and Australian governments, as well as for the Organization for Economic Cooperation and Development (OECD). He has published articles and given numerous presentations and workshops on evaluation, performance management and information management.

Recently, Mr. Montague has been involved in the implementation of performance-based management systems in a number of organizations. He has developed an approach to performance-based management which he has taught in workshops, on behalf of Treasury Board, the Office of the Auditor General and the Canadian Evaluation Society (CES), since 1992. He has also delivered department-specific workshops to more than 50 organizations over the past 15 years and has put on courses for international audiences (e.g., Institute for International Research, U.S. Department of Energy, Commonwealth of Australia, the OECD). Over 200 organizations and 10,000 persons have been reached by these workshops. Recently Steve has helped lead the development of guidelines and assessment tools for results management initiatives across various agencies of the Government of Canada.

Steve is a founding member of the Performance and Planning Exchange, a not-for-profit organization dedicated to the exchange of information and ideas on performance planning, measurement and reporting. (See <http://www.ppx.ca>). He is also an active member of the Canadian Evaluation Society and part of the science and technology technical interest group of the American Evaluation Association. Steve received the Leadership in Evaluation award from the Canadian Evaluation Society – NCR in 2003.

Steve has helped to lead the evolution of results logic modelling, evaluation, performance measurement and Results-based Management and Accountability Frameworks (RMAFs) in the various Government communities.

Specifically, some highlight achievements include:

- Developed and is currently delivering the Canadian Federal Government's first ever Regulatory Performance Measurement and Evaluation course under contract to the Canada School of Public Service.
- Recently designed and delivered Canada's first ever Strategic Policy Evaluation full credit course as part of Carleton University's graduate level Diploma in Public Administration – specialization in Policy and Evaluation.
- Introduced the concept of reach into results-logic modelling in the early 1990s – a practice which has now spread world wide.
- Led the emphasis on a behavioural change continuum for various types of programs – including a continuum for inter-related support communities. This is now embodied in several Departmental practices.

- First developed and used high level (i.e. agency wide) results logic models – a practice now institutionalized by Canadian Federal Treasury Board guidance for Departmental Performance Reports.
- Developed and implemented dozens of Results-based Management and Accountability Frameworks (RMAFs), including the first 'umbrella' RMAF (Agriculture and Agri-Foods Canada), and the early integration of risk assessments into RMAFs.
- Led the development of a Managing-For-Results self-assessment tool – the first of its kind to be jointly signed off by both the Canadian Federal Treasury Board Secretariat and the Office of the Auditor General – see http://www.tbs-sct.gc.ca/rma/account/transmod/tm_e.asp
- Led the development of alternative results models – for example the use of concepts such as circles of influence, the notion of a behavioural chain and the recognition of group interaction / engagement as key parts of an evaluation – and a results – perspective. A number of agencies are currently using these ideas in both evaluation and corporate planning and reporting documents.
- Pioneered alternative analytical techniques with regard to innovation policies and programs. In particular, the recognition of technology infrastructure and group interactions as key elements of the innovation system have been hallmark elements of these techniques.
- Introduced the problem-solving approach (see Sparrow 2000) to the evaluation of Canadian regulatory initiatives. When combined with the elements of innovation analysis noted above, this provides unique insight into public policy and programming in areas of public regulation.
- Pioneered approaches for the evaluation of outreach initiatives. See Environment Canada guidance – 2003.

OVERVIEW OF EXPERIENCE:

Performance Management (Planning, Measurement and Reporting)

Led the development and implementation of performance-based management systems in several public sector and not-for-profit organizations. Provided training, facilitation, and analytical assistance to a broad range of organizations. (Over 10,000 reached in more than 200 organizations over the past 15 years). Specific areas of focus have included the development of performance measures, benchmarking, performance reporting, and change management.

Program Evaluation

Acquired skills in all aspects of program evaluation and research through the management of numerous framework, assessment, review, and evaluation studies. These projects have covered a diverse range of policy areas including assistance for specific industry groups, innovation, regional economic development, trade, employment, information management, communications, and internal service functions. Summaries of specific evaluation projects are listed throughout the following sections.

Internal Audit and Management Review

Conducted several internal audit and management review projects through management consulting engagements. These projects have covered such areas as contributions and loans management, R&D, communications, administrative / records management, and financial management.

Technology and Innovation Programs Review

Analyzed, audited, and evaluated several government programs related to industrial innovation including federal institutes, funded national programs, federal / provincial sub-agreements, and technology centres.

Market Research and Industry Analysis

Conducted industry, company, and market analyses, product-market forecasts, and geographic studies using data from original survey research, personal interviewing, focus groups, and file reviews as well as electronic data base service bureaus and other third-party sources.

Information Resource Management

Performed assignments involving the assessment, development, and implementation of information systems. This included the performance of feasibility studies, data modelling, implementation projects, system audits, post-implementation reviews, and user training.

EXPERIENCE:

Program Evaluation

Canadian Food Inspection Agency (CFIA)

- Assisted the CFIA with the development of the Animal Health Science logic model for the Science Secretariat's **Performance Measurement Framework**. Approach involved development of the Animal Health Science logic model then deriving **performance indicators** at the direct and intermediate outcome level from the logic model using existing documents such as CFIA Corporate Risk Profile, Science Branch Strategic Plan and past logic models and Management, Resources and Results Structure (MRRS). It also included consultation with key Animal Health groups to ensure inclusion of all activities and good representation of their respective outcomes. (2007-2008)
- Assisted with and performed a quality review of the formative evaluation of the Canadian Regulatory System for Biotechnology for the CFIA. This project involved developing the approach and tools for all involved departments to use as they conduct their **evaluations** of their components under the CRSB, as well as the **evaluation** of the CFIA and Industry Canada components under the Initiative. (2002)

Agriculture Adaptation Council (AAC)

- Assisted AAC to develop and implement a **performance measurement** and reporting blueprint. This included holding a half-day workshop with the AAC Board of Directors to develop a **performance framework; establishing key measures** and sources for **performance measures** information; reviewing the current AAC proposal form; and, designing a prototype AAC performance report and a plan for the collection, analysis, and reporting of project **performance measurement** to support AAC program-level reporting.

Agriculture and Agri-Food Canada (AAFC)

- Assisted AAFC with the reporting of its achievements under the Agriculture Policy Framework (APF). The unevenness of AAFC's reporting infrastructure was addressed by helping to clarify and guide the content. Tasks included document review and assessment, reporting model development and Federal, Provincial and Territorial governance partners consultations. Final deliverable included a report with conclusions and recommendations for an improved reporting process. (2005)

- Updated the Results-based Management and Accountability Framework (RMAF) and a Risk-based Audit Framework (RBAF) for the Bovine Spongiform Encephalopathy (BSE) assistance to reflect Phases IV and V. Tasks included document review, revising RMAF components including logic model and **performance measurement and evaluation** strategies and preparing draft and final RMAF. (2005)
- Assisted Agriculture and Agri Food Canada to prepare a Results-based Management and Accountability Framework (RMAF) and a Risk-based Audit Framework (RBAF) for the Bovine Spongiform Encephalopathy (BSE) assistance. Tasks included document review, revising RMAF components including logic model and **performance measurement and evaluation** strategies and preparing draft and final RMAF. (2004)
- Co-managed a project to assist AAFC with the development of a result-based logic model and **performance measurement indicators** for the Food Safety and Quality (FSQ) component of the Agriculture Policy Framework (APF). Workshop sessions were held with Health Canada, the Canadian Food Inspection Agency, Department of Fisheries and Oceans, the Canadian Grain Commission and provinces to refine the logic model and develop **performance measures**. (2004)
- Assisted AAFC and specifically the Technical Trade Issues Team of the Agricultural Policy Framework initiative, with the development and implementation of results-based management planning, **performance measurement** and reporting. (2003-2004)
- Assisted AAFC and specifically Team 16 (Technical Trade Issues) of the Agricultural Policy Framework initiative, with the development and implementation of results-based management planning, **performance measurement** and reporting. Tasks included coaching and workshop delivery. (2002)
- Assisted with the development of a Results-based Management and Accountability Framework (RMAF) for the Agriculture and Agri-Food Canada Safety Net Initiatives, involving multiple departments and levels of government. Led all aspects of the assignment including the design, development and implementation of the federal governments's first strategic RMAF using a combination of direct assistance, workshop facilitation and coaching. RMAF components included profile, logic model, **performance measurement and evaluation** strategies and reporting strategy. (2001)

British Columbia Forestry Innovation Investment Ltd.

- Managed an **evaluation** study of the Japan Market Development Program for the Forestry Innovation Investment Ltd. (FII) involving following industry associations: Coast Forest Products Association (CFPA), the Council of Forest Industries (COFI) / SPF Group and the BC Wood Specialties Group. The objective of this **evaluation** study is to address key rationale, delivery, effectiveness, efficiency, cost-effectiveness and management issues. Methodology included document review, project file review, interviews, survey – more limited intensity users and case studies. (2008)
- Managed an **evaluation** study of the Canada Wood Group's **Market Access** Program for the Forestry Innovation Investment Ltd. (FII) and the Canada Wood Export Program (CWEP). The objective of this **evaluation** study was to address some key rationale, delivery, effectiveness, efficiency, cost-effectiveness and management issues. The methodological approach involved the use of multiple lines of evidence and complementary research method including document review, project file review, interviews and case studies. Deliverables included work plan, preliminary findings of the data gathering and analysis report, draft report and final report. (2007-2008)

- Assisted the Forestry Innovation Investment Ltd. (FII) with the development of a **performance management framework** with various components that constitute **performance management** and support its strategic planning process. The objective was to refine FII existing **performance management framework** to ensure that it complies with the *Budget Transparency and Accountability Act* with respect to completing an Annual Service Plan and Annual Service Plan Report and as a means of following sound management principles. The study involved the development and refinement of meaningful targettable **performance measures** for the corporation, refinement of the **performance measurement** framework, review of FII recipient **evaluation** program and assistance with writing the Service Plan. (2007)

Canada Revenue Agency (CRA)

- Conducted two two-day Results-based Management and Accountability Framework (RMAF) workshops for Corporate Audit and Evaluation Branch of the Canada Revenue Agency (CRA). The purpose of the workshops were to increase participants' awareness and understanding of how to apply a results-based management approach to **measuring the performance of programs**. The workshops utilized interactive and hands-on approach to learning, using existing RMAF materials developed by Performance Management Network Inc. (PMN) including logic models, **performance measurement and evaluation** strategies. (2006)
- Developed an **evaluation** framework for the PST Collections Program based on related policies, federal-provincial agreements, and operational procedures and practices. The framework identified program **evaluation** issues and methodologies for subsequent **evaluation** of the program, policies, procedures and practices. The **evaluation** also assessed the efficiency and effectiveness of the PST Collection Program.
- Supervised the **evaluation** of the Contraband Detection R&D Program. The purpose of the **evaluation** was to determine the impacts and effects of the program, whether the Program should continue, and if so, at what resource level. Involved in supervising all aspects of the **evaluation**: planning, issue refinement, data collection, analysis, report writing, and presentations to senior management.

Canada School of Public Service (CSPS)

- Designed and developed a course for the Canada School of Public Service (CSPS) on Regulatory **Performance Measurement and Evaluation**. Tasks involved developing the course training plan, design and development of course material according to CSPS systemic approach to learning including the participant's manual, presentation visuals, the instructor's manual and complementary training material. Deliverables included delivering the pilot course and the actual training course. (2008)

Canadian Agriculture Agri-Food Research Council (CARC)

- Provided assistance to the Canadian Agriculture Agri-Food Research Council with the development of a **performance measurement framework**. The **performance measurement framework** established the agri-food sector needs for CARC, defined a results chain, suggested **performance measures**, considered appropriate organizational goals and targets and remained consistent with funder needs in terms of **performance reporting**. (2005)

Canadian Cancer Society (CCS)

- Assisted the Canadian Cancer Society with the preparation and delivery of a **performance measurement framework which is being adopted across the organization**. This project involves developing the approach and logic models, **performance measures** / indicators, sources and collection (**including evaluations**), provision of training to divisions as required and presentations / briefings to the National Board of Directors. (2006-Present)

- Assisted the Canadian Cancer Society with the development of a **performance monitoring and evaluation** synthesis report. Tasks included a scan of the **performance monitoring and evaluation** systems across all Canadian Divisions, including **evaluations / performance measures** / indicators, in place at Divisions and at National Office of the CCS; preparation of a synthesis report based on the information gathered through the scan; preparation and delivery of workshop presentation; and, identification of progress markers and resource requirement. (2006)

Canadian Environmental Assessment Agency (CEAA)

- Developed and delivered a one day workshop on the basics of **performance planning, measurement** and reporting, to CEAA regional directors and managers. Objective was to develop a framework that would help them better manage, while at the same time meet the **performance measurement** information need of the Agency. (2003)

Canadian Evaluation Society (CES)

- Assisted the Canadian Evaluation Society (CES), National Capital Chapter (NCC), in delivering the Essential Skills Series (ESS), a series of four one-day workshops designed to provide evaluators with a basic understanding of program **evaluation**, how to plan for an **evaluation**, improving program **performance and evaluating** for results. Approach involved blending a combination of literature reviews, presentations, plenary discussions, and small group exercise to help ensure that participants benefit from as many forms of learning techniques as possible. Note – all sessions were publicly advertised. (2004-2007)
- Prepared and delivered a **performance measurement presentation** and workshop for the Canadian Evaluation Society New Brunswick Chapter. The workshop was delivered using a hands-on, case driven approach, drawing on practical examples from the experiences of participants and the facilitator. (2005)

Canadian Heritage (PCH)

- Assisted Canadian Heritage (PCH) to prepare a Results-based Management and Accountability Framework (RMAF) and a Risk Based Audit Framework (RBAF) for the Museums Assistance Program, the Canadian Museums Association and the Canada-France Agreement on Museums. The project involved a comprehensive document review, development of a logic model, **performance measurement and evaluation** strategies and reporting strategy. (2004)
- Assisted Canadian Heritage to develop a sectoral logic model that identified a series of sector-specific intermediate outcomes and measures for its branches: Multiculturalism; Aboriginal Affairs; Official Languages, Citizenship, Participation and Promotion; Heritage; Canadian Conservation Institute; and Canadian Heritage Information Network. Part of this work entailed the development of logic models for two of the sector's branches: Aboriginal Affairs & Heritage. (2003)
- Developed a Results-based Management and Accountability Framework (RMAF) for the Historic Places Initiative. Tasks included consulting with Corporate Review Branch and the Historic Places Initiative staff, preparing of the Historic Places Initiative profile, conducting brainstorming session on results-based logic model and preparing logic model. RMAF components included logic model, **performance measurement and evaluation** strategies and reporting strategy. (2002)

Canadian International Development Agency (CIDA)

- Assisted in the preparation of the Results-Based Management (RBM) Skills Development Program, including the development of Generic Module 1 – Introduction to RBM and Specialized Module 2 – Using Performance Information to Manage for Results. This included reviewing pertinent documentation related to RBM produced by CIDA; developing the learning outcomes, content, delivery methods and schedule for each of the assigned modules; test piloting the delivery of each assigned module with CIDA personnel; and, producing a Facilitator's Guide and Participant's Workbook.
- Conducted three workshops for the Central and Eastern Europe Branch managers and officers of CIDA to assist with the development of a **performance framework**. The workshop used basic concepts and applications of results-based management. A hot-line service was established following the workshop to answer questions of participants integrating course concepts in their everyday work. Prepared a brief report on the use of the hot-line and a log of all calls received over a period of two months after the training. (1996)
- Adapted the work already done by CIDA with performance-based management concepts developed through our Treasury Board course. Introduced and developed a **performance framework** approach to analyze Multilateral Branch work, and suggested the types of **performance measurement** appropriate to Branch strategies. (1995)
- Delivered a one-day workshop to the Multilateral Branch to introduce and developed a **performance framework** approach for the Branch. The session provided background and an early development of **performance measures** for the Multilateral Branch. (1994)
- Prepared and delivered a two-day session on Results-Based Management. The session helped the group elaborate on the major elements of a results-based management framework. (1994)

Canadian Radio-Television and Telecommunications Commission (CRTC)

- The **evaluation** study of Radio Diversity was designed to determine if there had been an increase or decrease in radio programming diversity since the implementation of the recommendations of the 1983 Review of Radio. Tasks involved detailed and comparison of the records of over 90 radio stations in a variety of markets against their "promise of performance".

Canadian Space Agency (CSA)

- The European Space Agency study evaluated the past and future benefits and results of Canada's participation in the programs of the European Space Agency (ESA). Steve's role for this **evaluation** included assisting in the development of the **performance framework** for Canada / ESA cooperation and ensuring its consistency with the CSA **evaluation** framework.
- Developed an **evaluation** framework for the Canadian Space Program (CSP). The scope of the framework included all approved programs within CSP, including those delivered by other government agencies such as Canada Centre for Remote Sensing (CCRS) and Communications Research Centre (CRC). The emphasis was on the careful identification of priority **evaluation** issues and the identification of feasible, cost-effective **performance and management control indicators**, and data collection strategies for the review and **evaluation** of the program.
- Contributed to CSA planning and the management of Canadian Space Station Program (CSSP) by addressing pre-selected issues regarding the User Development Program (UDP). The study addressed and responded to program impacts, rationale, design management, and alternative

issues in order to provide for more informed decision-making on the level and management of UDP resources.

Carleton University

- Designed and delivered Canada's first ever Strategic Policy **Evaluation** full credit course as part of Carleton University's graduate level Diploma in Public Administration – specialization in Policy and **Evaluation**. (2007-2008)

Citizenship and Immigration Canada (CIC)

- Developed a policy framework for the Corporate Review function that set out the mandate and scope of activities and defined relationships between reviews conducted by Corporate Review and local review activities conducted by Departmental Managers. The framework also consisted of a Corporate Review Policy, a mission statement, vision for the future, operating principles, values and key strategies. Deliverables included a handbook for managers outlining their review responsibilities and defined types of review.

Communication Canada (CC)

- Conducted an international relations program review of program records and results. This study described international activities in **telecommunications** and culture, their results, the validity of strategies employed to obtain program objectives, and the process by which program activities are carried out. This involved extensive in-house and client interviews, as well as, the review of files pertaining to key projects and issues.

Consumer and Corporate Affairs Canada (CCAC)

- Conducted a formative **evaluation** of long-term micrographic requirements to assist information resource management in the Department of **Consumer and Corporate Affairs**. Produced a descriptive networking model of information resources in the Department. Critical success factors for cost-effective information management in the organization were isolated.

Department of Fisheries and Oceans (DFO)

- Assisted the Department of Fisheries and Oceans Canada (DFO) to develop a results framework for the Habitat Program – in particular section 35 of the Fisheries Act. Deliverables included a background paper with a draft results logic and **performance measurement** strategy, a discussion paper with a refined logic model and **performance measurement** strategy, as a result of a workshop involving National Habitat Management staff; a regional managers workshop and, a final results discussion paper to senior management. Managed all aspects of the project. (2004-2005)
- Developed an RMAF for the Canadian Oceans Strategy (COS) that included a profile of the COS and how it is situated within the DFO as well as other organizations; identified the core **evaluation** issues; developed a logic model for the COS; outlined COS **performance measures** related to objectives set out in the legislation and draft COS; and define a data collection plan that established the information requirements and sources, and the responsibilities for data collection. Methodology included documents review, interviews with Oceans Sector staff, consultations with departmental staff, workshop and briefings. This RMAF implemented a new and innovative approach in that it addressed the development of an RMAF for a policy area as well as a horizontal initiative. The assignment succeeded in gaining a consensus on the results logic of the initiative, which, before this time, had been difficult to capture. (2001)

Department of Foreign Affairs and International Trade

- Assisted the Department with the Results-based Management and Accountability Framework (RMAF) Implementation study. 20 RMAFs representing a cross section of programs, policies or initiatives were examined. The objectives of this study were to examine the extent to which existing RMAFs have been implemented throughout the department; to determine the extent to which the department is implementing and utilizing results-based management practices with respect to decision-making and management of programs, policies, or initiatives, as demonstrated through the examination of the existing RMAFs and their implementation; and, to identify lessons learned with respect to the implementation of RMAFs within the department, including the identification of challenges or obstacles that may have impeded implementation as well as the identification of best practices. Methodology included review of RMAFs, in-dept interviews, e-mail consultation analysis and reporting. (2008)
- Assisted DFAIT through the provision of advice and guidance in regard to the department's Management, Resources and Results Structure and Program Activity Architecture and its associated TBS submission. Methodology included document review and consultations with department representatives. Deliverables included a primer, characterising the nature of the DFAIT performance story, the provision of framework approach – including the characterization of strategic outcomes, Program Activity Architecture statements, and a **performance measurement** framework suggesting indicators / indicator clusters, and the consideration of the governance and management of the **performance planning** and management function. This served as the basis for further work refinement to be conducted. (2007)

Employment and Immigration Canada (EIC)

- The **evaluation** study of Innovation Program TIEM Project focused on providing a far reaching and comprehensive **evaluation** of the TIEM project. Tasks involved the assessment of the design and implementation of the project, **measured the performance** of each of TIEM's management centres in terms of the creation and support of permanent jobs, assessed the direct and indirect impacts on participants and the communities in which TIEM centres were established, and compared the achievements of the TIEM project in comparison to other community projects with similar goals. Tasks also involved a review of the financial viability of the project and assessed whether the project could be self-sufficient within the allotted timeframe.
- Assisted on a major **evaluation** of a Canadian Job Strategies Innovation Program Project. Performed design, pretest, analysis and reporting phases of the project. The study assisted the Department in its resourcing decisions for a project under the Innovations program.

Environment Canada (EC)

- Managed a study to develop a combined Results-based Management and Accountability Framework and Risk-based Audit Framework (RMAF / RBAF) for the Species at Risk Program. The project involved a Steering Committee comprising the three delivery partners (Environment Canada, Fisheries and Oceans, and Parks Canada). Information collection involved extensive document review, more than 30 interviews with HQ and regional staff from the three departments, and a one-day workshop. The study involved bi-weekly meetings with the Steering Committee members to present project progress and ensure that the needs of the three departments were well reflected. Managed all elements of the study. Final RMAF / RBAF included **performance measures** indicators and an **evaluation** strategy. (2007)
- Prepared and delivered a **performance measurement** workshop to Environment Canada Strategic Issues Branch (SIB). The workshop was delivered using a hands-on, case driven approach, drawing on practical examples from the experiences of participants and the facilitator. (2005)

- Led the development of a framework which outlined a common results framework for Environment Canada's Urban Pilots Initiative. The project outlined a common vision, results logic, **performance measurement** and reporting strategy. The project achieved consensus in a very short time period, among a disparate group of federal, provincial, regional and municipal stakeholders. (2003)
- Assisted Environment Canada with the development of an outreach outcomes **measurement and evaluation** framework to enable the Department to set best practices in outreach activities. Tasks included refining project design and work plan; detailed document and file review; and, preparation and delivery of workshop presentation. Final report included detailed findings with the inclusion of relevant regional / service examples, conclusions and recommendations. (2003)
- Conducted an **evaluation** assessment of the Canadian Wildlife Service and Inland Waters Directorate. The study involved preparing a profile of the CWS and IWD detailing the linkages between the mandate, activities, outputs, clients and resources. In addition, the study defined **evaluation** issues for management consideration and recommended appropriate **evaluation** methodology options.
- Co-managed a project to develop a **measurement and evaluation framework** for the department's outreach functions. The project involved designing and conducting a one day workshop, and seven regional visits and interviews with leading practitioners.
- Assisted the department to develop a **service outcomes measurement and evaluation framework** to set best practices in outreach activities, and to develop a suitable **measurement and evaluation framework** for pilot projects established by the department, relating to services of urban leaders.
- Co-managed the **evaluation** assessment of the Canadian Parks Service. The study profiled CPS in addition to providing a preliminary analysis of issues, approaches and studies for future **evaluation**.

Health Canada (HC)

- Assisted HC with implementing the Cabinet Directive on Streamlining Regulation (CDSR) performance measurement requirements in the Health Portfolio Regulatory Programs. The work involves two phases: Planning and Implementation. Tasks included reviewing and validating the Health Portfolio's draft regulatory program logic model and assist with the development of **performance measurement** and evaluation plans for the Tobacco Control Initiative, Corded Window Coverings Products Initiative, Special Access Programme Block Release Initiative and the Safety of Human Blood Regulations. Tasks also includes assessing the Portfolio's strengths and challenges in complying with the CDSR regulatory performance reporting requirements and providing options for improvement towards full compliance with the CDSR. (2008)
- Assisted HC with the development of two half-day training sessions on evaluation for the Bureau of Food Safety Assessment. The training sessions involved coverage of Regulatory Results Logic, a Regulatory Hierarchy and Evaluation Framework and applications to the HC situation. (2008)
- Assisted HC with the development and delivery of a logic model workshop for Canada's Strategy for Safe Food. Tasks included literature review and preparation and delivery of a workshop and summarizing and analyzing data collected at the workshop for the report. Deliverables included a report with a logic model and **performance measurement framework** for Canada's Strategy for Safe Food. (2006)
- Assisted HC with the facilitation of a series of workshops / training sessions for staff involved with activities in support of the Canadian Environmental Protection Act (CEPA). Health Canada and

Environment Canada is responsible for the delivery of CEPA. Objective of the workshops was to develop recommendations for governance of the CEPA Program delivery at Health Canada. Tasks included regulatory review of CEPA. Deliverables included a summary report of the Health Canada Canadian Environmental Protection Act governance sessions including next steps. (2005-2006)

- Provided assistance with drafting and refining of the Centre for Infectious Disease Prevention and Control's (CIDPC) Program Activity Architecture (PAA) Treasury Board submission. Methodology included extensive document review and consultations, drafting PAA with **performance measures indicators** and developing results logic related to the PAA for each of the five program areas, briefings to directors, and finalizing report. (2005)
- Assisted the Health Policy Branch of Health Canada with the preparation of its results commitments under the Program Activity Architecture. Tasks included the development of results statements, **performance measures** indicators and targets for each of the directorates within the Health Policy Branch through document reviews, meetings and interviews. Interview guides were developed and data collected through meetings, document review and interviews were summarized and analyzed. Deliverables included a short discussion paper, characterising the nature of the department performance story, the provision of an alternative framework approach – including the characterization of strategic outcomes, Program Activity Architecture statements, and a modified **Performance Measurement Framework** suggested indicators / indicator clusters, and the consideration of the governance and management of the **performance planning** and management function.. (2004-2005)

Human Resources Development Canada (HRDC)

- Assisted the Installation, Maintenance and Repair Sector Council (IMR) Sector Council with the development of a Results-based Management and Accountability Framework (RMAF) and a Strategic Plan. The RMAF, developed to meet Treasury Board Secretariat requirements and the Human Resources Development RMAF Guide included a logic model and a **performance measurement and evaluation** strategy. (2003-2004)

Indian and Northern Affairs Canada (INAC)

- Assisted INAC with the development of its Departmental Results-based Management and Accountability Framework and Departmental Risk-Based Audit Framework (DRMAF / DRBAF). Tasks included providing expert advice and guidance on how best to build on existing work to achieve a strategic (umbrella) Results-based Management and Accountability Framework / Risk-Based Audit Framework (RMAF / RBAF) sufficiently robust to encompass the objectives of the strategic outcome tables and to support broader renewed authorities and the delivery of workshop sessions to key departmental representatives. The Department's performance was identified in terms of the five Strategic Outcome tables set out under its new Program Activity Architecture and was reflected in the results chains / logic models developed as part of the process. Deliverables included a 'Departmental' Results-based Management and Accountability Framework report characterising the nature of the INAC performance story, the provision of an alternative framework approach – including the characterization of strategic outcomes, Program Activity Architecture statements, and a **performance measurement framework** of suggested indicators / indicator clusters, and recommended governance and management provisions. This ambitious assignment was the first of its kind in the Government of Canada. (2004)
- Assisted the Department with the preparation of its Departmental Performance Report (DPR) for the period ending March 2004 as per Treasury Board guidelines. The DPR incorporated the strategic outcomes, corporate planning and reporting initiatives of the newly developed Departmental Results-based Management and Accountability Framework. (2004)

- Conducted an **evaluation** of the Self-Government Negotiation Funding Support (SGNFS) contribution program. The **evaluation** was based on a **performance framework** approach that was based on the **performance measurement**, management, and reporting structure of the SGNFS program. The **evaluation** included the co-ordination of several tasks, including the undertaking of both a document review and a media analysis; the delivery of an **evaluation** review workshop; the conduct of several interviews with stakeholders; and most significantly, the execution and validation of five case studies, a task that included extensive preparation and the conduct of many on-site interviews. As a result of a culturally sensitive approach, the study team was able to gain unique access to First Nations and Aboriginal peoples. The richness of the information from the personal interviews and case studies greatly enhanced study credibility to all stakeholders. (2001-2002)

Industry Canada (IC)

- Assisted the department with a review and a thorough assessment of the Hydrogen Economy Initiative. The objective of this review was to assess the overall **performance** of the Hydrogen Fuel Cell Committee over the five year period 2003-2008. The review examined the role of the committee in co-ordinating and guiding the hydrogen and fuel cell related initiatives of federal departments, leading the development of a national fuel cell strategy framework and related consultative process, and developing partnerships with other levels of government and the private sector. **Evaluation** issues examined included program relevance / rationale, success, governance and accountability and lessons learned. Methodology included document review, financial analysis, interviews with performers, funders and private sector partners and case studies. Deliverables included a detailed workplan and logic model, preliminary results report, draft report and final report. (2007-2008)
- Assisted the department with the development of an integrated Results-based Management and Accountability Framework (RMAF) and Risk-Based Audit Framework (RBAF) for the Aerospace and Defence program. Tasks included document review, consultations with Audit and Evaluation branch representatives and preparation of draft and final RMAF / RBAF. Final document included **performance measurement and evaluation strategies**. (2006-2007)
- Assisted the Competition Bureau (CB) with the development of a National Mass Marketing Fraud Strategy (NMMF) particularly in the area of **performance planning and measurement**. Deliverable included a preliminary list of performance indicators to support the NMMF logic model, refine **performance indicators and measurement strategy**. (2004-2005)
- Assisted the Criminal Matters Branch (CMB) to review and improve the service standards for the Competition Bureau (CB). The goal of the project was to foster more systematic processes and reduce response time of the Bureau, leading to a more efficient and effective use of Bureau resources. Final deliverable included preparation of a report with recommendations for a Service Standard Implementation Strategy. (2004)
- Provided the Competition Bureau (CB) with consulting services to develop the **performance measurement** framework approach and process; and, conduct reviews of plans and reports as well as **performance measurement** frameworks for the branches and the Bureau. (2004)
- Assisted IC with the **evaluation** of the Deceptive Telemarketing Initiative. The **evaluation** framework report included an overview of the amendment (e.g., establishing the scope of the **evaluation**); proposed **evaluation** issues to be addressed by the study (e.g., categories of relevance, success and cost-effectiveness); proposed approach and methodology; timing for the **evaluation**; options and budget. **Evaluation** methodologies included a workshop with management and staff, development of interview guides conducting close to 40 interviews, summarizing and analyzing data, cost-effective analysis and a document review. This study was the first ever formal **evaluation** of a regulatory control program in this area. The findings have helped to shape specific regulatory initiatives, **measurement projects and plans**. Deliverables

included an **evaluation** framework report designed around **evaluation** systems across Canada using Treasury Board Secretariat's Evaluation Policy, to conduct the **evaluation** of the Telemarketing amendments to the Competition Act, a draft **evaluation** report, a final **evaluation** report and briefing to **Evaluation** Steering Committee. (2003-2004)

- Conducted a baseline assessment of the 2000 Policy on Title to Intellectual Property Arising Under Crown Procurement Contracts (2000 Policy). The **evaluation** examined the factors that affected the process of implementation and management of the policy and its impacts, both intended and unintended, upon the Contractors and the Crown. The **evaluation** also identified data collected, identified and assessed gaps in data collection, and reviewed the ability across the Government of Canada's departments to monitor efficiently the commercialization objective of the new Policy. (2004)
- Assisted the department with the development of a trade **performance planning and measurement** good practices study. The Department required a study to review and consolidate strong efforts by various sector branches into a description of good practices. The results of the study was presented to and reviewed by senior managers responsible for Trade as they engage in the senior policy management of the Department. Developed **communications** brief, consulted departmental officials, facilitated workshop, prepared draft and final reports. (2003-2004)
- Technology Partnership Canada was a major (\$300 million per year) federal government innovation and economic development program, directed towards providing repayable funding support to innovative projects in the areas of environmental (energy saving, greenhouse gas reduction) technologies, enabling technologies (IT and biotechnology), and aerospace and defence. TPC supports a relatively small number of large, multimillion dollar projects directed towards support for federal strategic objectives such as reduction in greenhouse gases and connectedness. This evaluation examined relevance to federal objectives and industry need, progress towards achievement of objectives, possible improvements to design and delivery, and lessons learned. Guided by a Steering Committee, the evaluation used multiple lines of evidence, including document, file and database review, interviews with program staff and selected clients, a survey of a representative sample of funded clients, and case studies to examine the technological and commercial impacts of TPC funded projects. Case studies included examination of alternative fuel vehicles and hydrogen production for next generation fuel cell powered transportation. As a consequence of this study – a major strategic review of TPC was undertaken. Within a year significant policy, management and design changes were undertaken by senior management. (2002-2003)
- Assisted Technology Partnerships Canada with the development of a Results-based Management and Accountability Framework (RMAF) and a Risk-based Audit Framework (RBAF) for the Early Adopters initiative. The RMAF comprised of program profile, logic model, ongoing **performance measurement** strategy, **evaluation** strategy and reporting strategy. The RBAF comprised of the introduction, risk profile, risk assessment, risk-based monitoring and audit plan and other issues. (2003)
- Developed a lessons learned study which summarized historical developments and best practices in trade (and general) **performance measurement**, offered insights and a proposed approach to results based management and measurement and produced specific guidance on **performance measurement** practice for managers and officers of all experience levels. (2003)
- Assist IC with the development of a senior briefing and a proposed work plan for the development of a strategic Results-based Management and Accountability Framework (RMAF) for the Trade Strategic Outcome. Tasks included review of **evaluation** systems, document review, consultations with departmental officials, research, collect, summarize and analyze data necessary, and refine the approach. Deliverables included preparation of a draft and final work plan and schedule, preparation of mock up of the RMAF logic model and a detailed Table of

Contents including a **performance measurement** strategy and **evaluation** strategy component for Guide for elements of RMAF. (2003)

- Assisted the Canada-Ontario Business Services Centre (COBSC) in developing a blueprint for improved **performance analysis, planning, measurement** and reporting to ensure efficiency in its dealings with its partners. Part of this work included the analysis and establishment of a results management framework for COBSC's relationship with the International Trade Centre and the Regional Access Points. (2002)
- Assisted Industry Canada with the development of content related to results and **performance-based management**, including information to be used on the Department's intranet site. Developed draft guidance on the performance measurement framework, the spheres of influence and the needs-results hierarchy. (2002)
- Assisted the Manufacturing Industries Branch with a workshop to provide participants with a basic knowledge of **performance management** concepts and how to apply these ideas to their project initiatives. (2002)
- Led in 1998, 1999, 2000 and 2002, senior level Industry Canada retreats relating to the Department's Departmental Performance Report. These sessions helped to garner consensual understanding and development of results oriented priorities for the Department.
- Led the planning and delivery of an **evaluation** of Strategis at IC. The **evaluation** study results were viewed as contributing to decisions surrounding the future of Strategis. The **evaluation** examined Strategis within its current environment, taking into account such initiatives as the work on the Internet presence policy, Government On Line and French on the Internet. The study reported on Strategis relevance, success and cost-effectiveness. Study findings were well received and directly used by Departmental Senior Management (led by CIO D. Fulford) to plan the future of Strategis and more generally to help plan IC's internet service presence. (2001-2002)
- Assisted Industry Canada with the development of evaluation frameworks for its five Departmental Strategic Objectives. The result of this work was an integrated evaluation framework for the five Strategic Objectives which contained, at a general level - then specifically for each objective: a profile; proposed performance indicators; proposed performance issues; a measurement and reporting strategy; and, evaluation options. Deliverables also included development of a template (and contents) for use by the strategic objectives teams in the development of a measurement and reporting strategy; coaching / assistance to strategic objective teams in the selection of performance indicators and in the development of a measurement and reporting strategy; delivery of three workshops for the strategic objectives teams; and, providing support to the strategic objective teams in working with and briefing the Assistant Deputy Minister Champion for each strategic objective, and other stakeholders. (1999-2000)
- Assisted the Contact! network of IC in the development of an **evaluation** framework. A **performance measurement framework** development session was held which created a **performance measurement framework**, a set of **performance measures** and indicators, and a 'blueprint' for performance planning and reporting. An assessment was then conducted which examined existing information systems' capabilities to provide appropriate **performance measures** / indicators. This also included identifying additional systems or procedures for data collection and survey requirements and methodologies to compile and analyze data, developing optional actions plans for implementation and costing each developed action plan option. (1998)
- Undertook the design phase for the surveys of actual clients and potential clients of the Canada-Ontario Business Service Centre (COBSC). The survey of actual clients will be used to obtain statistically valid and reliable information on current COBSC client information needs, usage,

perceived value, and benefits, while the survey of potential clients will obtain the information needs, preferred medium, and perceptions of potential clients across the five major postal code regions of Ontario. The design phase included methodology, sample, and instrument design.

- Assisted in establishing a Sustainable Development (SD) strategy for IC. A plan for assessing the current performance of the strategy was developed as well as a methodology for consultations. This strategy is being used as the benchmark against which all other departmental SD strategies are judged.
- Assisted IC and the Technology Outreach Program (TOP) management with program benefits analysis and reporting. The Department required descriptive information to understand how program assistance works in different service roles. Conducting case studies, assisted to validate quantitative impact estimates with systematic qualitative observations. These case studies also served to explain how and why various technology assistance services work. The goal of this project was to produce credible and systematically quantified evidence of TOP program performance – linking its client influence to economic impacts.
- Developed a senior management report on the Technology Outreach Program (TOP) which set appropriate **performance targets** and was used to present a fair and accurate reflection of current performance. This task included establishment of the key **performance measures** elements to be reported for the Technology Outreach Program; development of appropriate qualitative and quantitative analytical components for TOP corporate reports; and, assistance to TOP management to develop an annual report for TOP for fiscal year 94/95. The system was favourably reviewed by the OAF in the mid 1990s.
- Assisted the Alberta Regional Office with the development of an **evaluation** framework for the Business and Community Development Agreement (BCA) signed September 19, 1992. A **performance measurement framework** was used as the basis for the **evaluation** framework, and a **performance measurement** framework development session was the cornerstone of the framework development process.
- Provided Technology Outreach Program (TOP) centres with summaries of the **performance measurement** results and helped them understand the implications of these results. Fifteen reports and presentations were prepared.
- Conducted a review of the Canada Scholarships Program (CSP) to provide program management with direct input in its preparation of a Cabinet document. The study included the conduct of four large scale surveys and involved close to 1,500 telephone and on-site interviews.
- Assisted in the analysis of Science and Technology (S&T) assistance programs as they relate to the needs of Canadian small and medium enterprises (SEES). Tasks involved completing a grid of assistance program offerings versus SMAE assistance needs; a framework and comparative assessment of the value of different assistance programs to Canadian SEES; and, conclusions and recommended options to improve the cost-effectiveness of SMAE assistance.
- Conducted further impact analysis of four services of Technology Outreach Program (TOP) funded centres. The four priority services were networking, technology transfer, testing and analysis, and integrated R&D. Tasks included completion of the impact analysis from the client information obtained from the centres and prepared a series of tables for each centre for each of its services and preparation of a more detailed impact analysis report for each centre and for the program. This consisted of a report which provides specific information on what the results mean for each centre. The study involved a telephone survey of 1,000 clients of the various centres.
- The purpose of the Technology Outreach Program (TOP) Pilot was to test the **Performance-Based Management** System model implemented in selected technology centres. Methodologies included file reviews and data collection.

- Completed a review of SILICON. Reviewed the documentation available within the Department relating to the SILICON. Performed a site inspection of the facility and provided a report to the Department which commented on the current financial position and viability of the Centre; the Centre's compliance with the general conditions of the Letter of Offer under the Technology Outreach Program; the Centre's performance to-date against the targets set out in the Statement of Work; and, recommendations for any corrective actions to be undertaken.
- Conducted the **evaluation** of the TOP-AIM program at IC. This study examined the effectiveness of TOP-AIM to develop networks, and strategic alliances as part of the Federal governments technology diffusion strategy. The **evaluation** report contributed to senior management decisions on whether to continue with future funding for the initiative. The study also examined the management practices used to direct and manage the use of intermediaries to carry out Federal government programs. A survey of over 200 actual and potential clients (representatives of private sector organizations, educational institutions, associations, and government organizations) of the funded activities, a case study as well as in-depth interviews were involved.
- Established a common understanding of how intellectual property rights (IPR) work and a vision of the federal policy relating to IPR regarding federal contracts. From this common understanding and vision, recommended a course of action and responsibilities for **performance monitoring**.
- Conducted the **evaluation** of the Materials Assessment Project (MAP). The study involved a review of all documentation. Delivered a qualitative assessment of all existing evidence of cost-effectiveness of MAP. Interviewed 100 users and non-users of the program.
- Provided ongoing monitoring to three technology centres co-funded by IC to promote technology transfer and the diffusion of technologies. Tasks involved review of centre business plans, support claims, revenue projections, achievement representations, provision of advice and assistance to the centres in terms of performance targeting, accounting systems and management structure. The centres monitored included Welding institute, Société d'Informatique et de recherche pour l'industrie de la construction (SILICON); and, Centre des Matériaux Composites (CMC).
- Conducted the **evaluation** of the Science Culture Canada (SCC) which involved examining key specific issues included in the broad **evaluation** issues of rationale, objectives achievement, impacts and effects, and alternative programs and ways of delivery SCC. This study was conducted in conjunction with an audit of the program, and the results were integrated into the final project deliverables. The study involved a survey of 100 organizations who had applied for assistance under the program of 1,000 individuals (as young as 8 years old) who had participated in the activities sponsored by the program, case studies, and in-depth interviews with various stakeholders and committee representatives.
- Guided an impact assessment study of the Canadian Industrial Innovation Centre / Waterloo (Innovation Centre). The study included a survey of 500 clients of the Centre.
- Assisted in the development of a Memorandum to Cabinet for the Technology Outreach Program. The exercise, based upon the findings of the recently completed program **evaluation** study, assisted in establishing the appropriate program focus and objectives including the targets for assistance, the services to be provided, and the role of IC in delivery. In addition, a set of principles and eligibility criteria for funding centre services was identified. A **performance management** framework was developed to include **performance results measures** which to serve as a basis for appropriate monitoring and assistance review.
- The **evaluation** of the Technology Outreach Program (TOP) examined strategic issues and lessons learned from the use of technology centres to achieve technology diffusion objectives.

The study also assessed the program design and delivery, making recommendations for program change. Case studies were undertaken to address some of the **evaluation** issues.

- Developed business plan guidelines and information packages for the Technology Outreach Program. The study assisted IC management in the promotion and assessment of Technology Outreach Program applicants.
- Conducted a study for the Environmental Affairs Branch involving in-depth interviews with potential clients of the St-Lawrence Environmental Technologies Development Program. The study was designed to help program management determine which firms it should target. Interviews were conducted in English and French. Played a major role in the overall study design, interviewing, report writing and presentation of the results.
- The study examined several current IC programs vis-à-vis a program delivery life cycle model. The IC program included the Strategic Technologies Program, Sector Campaigns, the Technology Outreach Program, and the Environmental Technologies Development Program. Critical Success factors for funded program delivery were highlighted through case studies leading to specific recommendations.
- The **evaluation** of the Canada Scholarships Program was completed to assess program impacts and to provide information relevant to program policy, design and delivery. The study involved mail surveys with over 3,000 people from four different groups (program recipients, university students, high school students, and high school teachers) as well as interviews with program administrators and experts.
- The **evaluation of the Industrial Regional Development Program (IRDP)** was a post-facts report on the design and delivery of IRDP and the impacts on program results. The intention was to provide a number of "lessons learned" for future alternative programs. What was the usage / take-up of the program vis-a-vis its objectives? What was the adequacy of IRDP support? How effective were the design and delivery mechanisms? What were the results? What are the program / instrument alternatives? A broad range of methods were used including interviews with program staff; case studies; interview with 100 recipients of assistance, 100 rejected applicants, and 100 members of a comparison group; and interviews with experts.
- Performed a special study of IRDP-Innovation. The study analyzed the usage, management and delivery of this program to assist senior management to set a policy for future innovation programming.
- Performed a special study of international practices for the review / **evaluation** of science and technology. The study profiled science and technology **evaluation** in the OECD and other nations, and developed a comprehensive bibliography of sources. The project team then performed an in-depth review of Canadian federal practice. The report provided senior MOSST management with information to assist in future federal government science and technology review activities.
- Conducted an **evaluation** study of Federal Government innovation assistance programs for industrial development. Managed the file review, database and statistical functions related to the study. Also performed one third of all personal interviews and a significant portion of the final report writing. The study provided significant profile information on industrial innovation assistance clients in terms of sectors, firm size, innovation costs, location etc. DRIE's knowledge of the innovation process in small, Canadian, industrial firms was greatly increased. Benchmark impact indicators for future program planning were produced.

Infrastructure Canada (INFC)

- Assisted INFC with the preparation of a **performance measurement** framework and Statement of Work for a Horizontal Reporting Strategy. Methodology included document review, interviews and consultations. The framework incorporated current Management, Resources and Results Structure requirements and contained broad results categories, **performance measurement** indicator types, issues, broad approaches, time lines, level of effort and responsibilities. Tasks included summarizing and analyzing data collected through interviews and consultations. Deliverables included a short discussion paper, characterising the nature of the INFC performance story, the provision of an alternative framework approach – including the characterization of strategic outcomes, Program Activity Architecture statements, and a modified **performance measurement** framework suggested indicators / indicator clusters, and the consideration of the governance and management of the **performance planning and management** function. (2007)
- Assisted Infrastructure Canada with the development of an RMAF / RBAF for the Public Transportation Fund (PTF) transfer payment program. The PTF program provide funding to communities with transit systems contributing to reduction of GHG emissions and energy use, and reduction of smog forming air emissions. Deliverables included a finalized RMAF / RBAF with logic model and **performance measurement and evaluation** strategies and provision of expert advice and limited meeting support regarding the implications of the RMAF / RBAF to the TBS Submission and Terms and Conditions. (2006)
- Assisted Infrastructure Canada with the development of an RMAF / RBAF for the Gas Tax Fund First Nations (GTF-FN) transfer payment program. Tasks included document review and preliminary meetings, development of draft and final RMAF / RBAF. Deliverables included finalized RMAF / RBAF with logic model and **performance measurement and evaluation** strategies, provision of expert advice and meeting support regarding the implications of the RMAF / RBAF to the TBS Submission and Terms and Conditions. (2006)
- Assisted Infrastructure Canada with the development of an RMAF / RBAF for the Gas Tax Fund transfer payment program. The RMAF / RBAF was touted as a model by Canadian central agencies. Deliverables included a finalized RMAF / RBAF with logic model and **performance measurement and evaluation** strategies, provision of expert advice and meeting support regarding the implications of the RMAF / RBAF to the TBS Submission and Terms and Conditions. (2005)
- Adjusted the Municipal Rural Infrastructure Fund (MRIF) RMAF / RBAF to include the Municipal Capacity Building initiative. Adjustments were made to the profile, the logic model **performance measurement** strategy and the **evaluation** strategy. (2005)
- Assisted with the development of an RMAF for the Municipal Rural Infrastructure Fund (MRIF), and the Research program in addition to amending the existing Canada Strategic Infrastructure Fund (CSIF) RMAF. Tasks included document review, develop / revise RMAFs including **performance measurement and evaluation** strategies, seek inputs and finalize documents. (2004)
- Assisted with the development of the Canada Strategic Infrastructure Fund (CSIF) and Border Infrastructure Fund (BIF) RMAFs. Tasks included workshop facilitation, interviews / meetings and RMAF preparation. RMAF components included profile, logic model, **performance measurement and evaluation** strategies and reporting strategy. (2003)
- Assisted Infrastructure Canada in preparing two Results-based Management and Accountability Frameworks (RMAFs) related to agreements with Quebec and New Brunswick. Tasks involved document review, interviews and design and conduct a one day workshop to refine the logic models and **performance measurement and evaluation** strategies. (2002)

International Development Research Centre (IDRC)

- Prepared and presented on **Measuring the Results** of Development Research at the Centre's Open Program Meeting. (1999)
- Assisted in the development and implementation of a **performance framework** planning initiative for the Micronutrient Initiative. Refined the existing strategies and three-year work plan through the use of a performance framework in order to consistently focus on results throughout MI focus areas. (1999)
- Undertook the review of the Program on Information Systems Management (PRISM). This included a review of PRISM documents to establish key **performance goals** and a general **performance measurement framework** for the program. Also reviewed a selection of project cases to establish linkages with PRISM program objectives; conducted a half-day workshop session to establish a program **performance measurement framework** for PRISM; followed-up on the **performance measurement framework development** session to capture the consensus framework, key results, and **performance measures**; produced a set of key guiding questions and a preliminary design for the on-going and / or periodic collection and analysis of program performance information; and, submitted a detailed and satisfactory report of the work accomplished. (1994)
- A **performance measurement framework** for Information Sciences and Systems Division (ISSD) was established to provide a precise articulation of the full range of expected results (linked to ISSD program statements); consensus among key IDRC organizational groups on the most important aspects of performance; and, a basis for goal setting, **performance measurement**, and management adjustments. The project proceeded from the **performance measurement framework** to suggest and produce a preliminary design for the on-going and / or periodic collection and analysis of **performance measurement** information. The design included sample selection, instrumentation, analysis, and reporting consideration. (1993)

International Finance Corporation (IFC)

- Assisted the International Finance Corporation with the development of a Monitoring and **Evaluation** System for Private Enterprise Partnership for Africa. Tasks included participation in meetings / teleconferences, document review and telephone interviews, web-based research on business **performance measurement indicators**, design and submission of workshop materials, field visit to Johannesburg, contributions to the monitoring and **evaluation** framework and reporting. (2005-2006)

International Trade Canada (ITCan)

- Assisted ITCan with the development of a **performance measurement framework**. The scope and intent of this assignment were to assist ITCan to refine its existing work on **performance measurement** indicators, develop and implement **performance measurement** indicators which allows for an integrated ITCan performance story while remaining consistent with the exigencies of the Management, Resources and Results Structure, the International Policy Statement on Commerce and the fundamental nature of the work. The scope involved the work of the entire agency – thus the level of complexity was high. Deliverables included a short discussion paper, characterising the nature of the ITCan performance story, the provision of an alternative framework approach – including the characterization of strategic outcomes, Program Activity Architecture statements, and a modified **performance measurement framework** suggested indicators / indicator clusters, and the consideration of the governance and management of the performance planning and management function. (2005)

Justice Canada (JC)

- Assisted Justice Canada with facilitating four workshop sessions to help develop legal services **performance measures** for the Management, Resources and Results Structure. Tasks included project familiarization, preparation and delivery of workshop sessions, summarizing and analyzing data from workshop as well as help refining Management, Resources and Results Structure-Program Activity Architecture documents. Deliverables included various results chain and Program Activity Architecture chart elements, characterising the nature of the Justice Canada performance story, the provision of a results-based framework approach – including the characterization of strategic outcomes, Program Activity Architecture statements (including sub and sub-sub activities), and a modified **performance measurement framework** suggested indicators / indicator clusters, and the consideration of the governance and management of the performance planning and management function. (2004)
- Assisted Department of Justice Canada with the development and implementation of a **performance measurement strategy** and a reporting strategy for use by Provincial / Territorial funding recipients and service delivery agencies to measure and report on the ongoing performance of their Provincial / Territorial Aboriginal Court Workers Program. Also assisted the department by providing a training workshop for its staff. (2004)

Labour Canada (LC)

- Assisted Labour Canada to perform an **evaluation** framework of their Arbitration Services.
- Produced an **evaluation** framework (the first ever) of the **communications** function. The project involved extensive consultations with senior management across the Department and a review of current policy and procedure.
- Performed the **evaluation** framework study of the Department's Bureau of Labour Information. Qualitative and quantitative information was compiled through a series of personal interviews, focus group meetings, documentation reviews, and policy analysis.

National Capital Commission (NCC)

- Developed **evaluation** frameworks for three programs, a guide on preparing **evaluation** frameworks and an orientation course for managers on how to prepare an **evaluation** framework. The frameworks were developed by conducting literature reviews, interviews, and workshops. The workshops focussed on developing clear, measurable objectives, and appropriate performance indicators.
- Assisted the NCC to develop a 5 year **evaluation** plan. Extensive linkage was achieved between **evaluation** and audit, marketing, and national programs in developing proposed projects. The work also established the strategy and role of **evaluation** in the Commission.

National Defence (DND)

- Prepared a background paper on planning and **evaluation** for the R&D policy unit. This paper was one in a series produced for the R&D group outlining how a planning and **evaluation** process could be conducted by the group. A one day seminar was conducted with SPAG to obtain consensus on the planning and **evaluation** process to be followed. A background paper was then prepared and submitted to the R&D policy unit to be used as a source document for their policy paper on planning and **evaluation**.
- Reviewed and provided consulting advice on the Research and Development Branch's *Program Planning and Evaluation Groups' Proposed Way Ahead* report of July 14, 1993. Provided

suggestions on methodologies and approaches which could be used to implement the planning and evaluation system.

National Research Council (NRC)

- Managed a study on the **evaluation** of the Fuel Cell and Hydrogen Program. The **evaluation** issues examined were: relevance; success; design, delivery and cost-effectiveness; and, opportunities and future direction. **Evaluation** approaches and methodologies includes document review, administrative / performance data review and key informant interviews (internal and external). (2007)
- Assisted with the development of an umbrella Results-based Management and Accountability Framework (RMAF) for NRC's Technology Cluster Initiatives. Tasks included document and key literature review, meetings / select interviews with the strategy and development branch, preparation of profile, logic model, core **performance measures**, indicators, **evaluation issues** and workshop facilitation. Deliverables included draft and final umbrella RMAF. (2007)
- Conducted an **evaluation** of the Institute for Research in Construction (IRC) which showed accountability and demonstrated the effective use of resources to achieve a reasonable level of performance, and allowed IRC to achieve greater effectiveness through program improvement such as strategic realignment of activities. Methodologies used included a document review, client survey, stakeholder interviews and case studies. Presentations were also conducted to the Advisory Committee throughout the project. The report included the findings from all sources and recommendations for improvements. (1998)
- Assisted NRC with the development and reporting of case studies to assess the outcomes, impacts and benefits of Industrial Research Assistance Program (IRAP) assistance. The tasks involved included refining terms of reference, developing models and protocols, collecting and refining case study candidates, and investigating, collecting and analyzing information as per models and protocols. The final step was the integration of case study information into the overall IRAP review process.
- Designed, developed and implemented a major **evaluation** of the Industrial Research Assistance Program (IRAP). The study involved management review, a major nation-wide survey of program recipients and key stakeholders, as well as case studies, which profiled the socio-**economic** benefits of select projects. The study examined and reported on issues of relevance, success and cost-effectiveness.
- Assisted the Canadian Technology Network (CTN) with the early development of integrated node reporting. This involved assessing the feasibility and developing collection, analysis, and reporting mechanisms for core CTN nodes.
- Developed an **evaluation** framework for the Canadian Technology Network (CTN) based on limited consultations and document review; reviewed the draft **performance framework** with key groups of stakeholders; established a **performance measurement** framework, key performance areas, information needs and a 'blueprint' for performance reporting; and, reviewed work with CTN Advisory Committee.
- Developed an **evaluation** framework for the Industrial Research Assistance Program (IRAP) to set out the issues, indicators, and **performance measures** necessary for the future **evaluation** of the program. This framework built on the **performance measurement framework** and reporting system which has been established by IRAP management.
- Led the Strategic Engineering Assessment. The assessment reviewed the five engineering institutes at the NRC, completed a sector analysis, as well as a client survey, impact and effects modelling, and completion of a project data base. Tasks involved guiding the preparation of the

profiles for the Institute for Research in Construction and the Institute for Mechanical Engineering, client survey, the overall strengths and weaknesses analysis of the study and the numerous briefing and reporting sessions.

- Performed a major **evaluation** of the Industrial Research Assistance Program (IRAP). The study examined the results, delivery, organizational effectiveness, and strategic design of the program. The study surveyed a statistically reliable sample of recipients, stakeholders, and a control group, in addition to performing an extensive literature, project file, and case study review. The results were provided to NRC senior management to support strategic, tactical and operational program decisions.
- Performed two projects related to the National Aeronautical Establishment. The first project was an **evaluation** assessment and planning report which profiled the Division, set out study issues, options and plans for **evaluation**. The second portion was the **evaluation** study itself which addressed rational, objectives achievement, impacts / effects, and alternatives issues. The projects represented the first time the NRC had seriously attempted to link Division resources directly to activities, service outputs and clients.
- Performed an **evaluation** framework and special study of the Division of Physics at NRC. The project performed the traditional **evaluation** framework functions in addition to developing a management framework for lab management. Technical experts were teamed with **evaluation** specialists to perform this work.
- Led a methodology study to advance **evaluation** practices for R&D programs. The project developed a model for the R&D **evaluation** process.
- Conducted a program **evaluation** of the Division of Mechanical Engineering (NRC). The study reviewed the nature of client interactions, as well as benefits and service satisfaction levels.

National Round Table on the Environment and the Economy (NRTEE)

- Developed a **performance measurement** framework for the National Round Table on the Environment and the Economy. Tasks included document review, workshop development and delivery, debriefing for the NRTEE executive committee and plenary board and providing advice as needed. (2002)

Natural Resources Canada (NRCan)

- Currently working with Climate Change Impacts and Adaptation Division to facilitate up to 5 one-day workshops with provincial representatives of the Regional Adaptation Collaborative (RAC). The methodology includes using the existing logic model for NRCan's new adaptation programming to refine the proposed strategic approach and organize the planned workplan elements of RAC proposals to reflect the logic model of the parent program. Deliverables includes a presentation, a final strategic approach for the RAC and a draft of the existing workplan elements of the RAC proposals. (2009-present)
- Currently managing the **evaluation** of the Forest Industry Long Term Competitiveness Strategy and Core Funding for 2008-09. The purpose of the **evaluation** is to examine the relevance, success and cost-effectiveness of the key elements of the initiative (FPInnovations, the Canadian Wood Fibre Centre and Transformative Technologies Program) in meeting their objectives. It also includes assessing the relevance, success and cost-effectiveness of the core funding of FERIC and Forintek through contribution agreements. This **evaluation** will provide evidence concerning the effectiveness and impact of the NRCan contributions to the Forest Research Institutes, and will be used to provide input to renewal of funding. Methodology includes document and file review, in-depth interviews, case studies, and analysis, integration and reporting. (2009-present)

- Assisted Natural Resources Canada to develop and implement performance indicators for the Canada Wood Export Program (CWEP). Approach involved a **performance measurement** workshop with CWEP and the Forestry Innovation Investment Ltd. (FII) staff to review the draft logic models and develop **performance measurement** indicators and a strategy for measurement. Following the workshop, a process for introducing the new **performance measurement** approach to industry associations was finalized. (2007)
- Managed the **evaluation** of the Canada Wood Export Program (CWEP). The study involved conducting an **evaluation** assessment. Issues examined were related to the program's relevance, success and cost-effectiveness. The **evaluation** methodologies included a document and data review, in-depth interviews with representatives of the industry associations (key delivery agents) and the Canadian Forest Service, industry clients, other government department representatives and international stakeholders, and three in-depth case studies. (2006-2007)
- Assisted the department with the preparation of a Results-based Management and Accountability Framework (RMAF) for the Climate Change Impacts and Adaptation Directorate (CCIAD). Methodologies included document review, and the development of profile, logic model, **performance measurement** and **evaluation** and reporting strategies. Deliverables included a draft and final RMAF. (2007)
- Managed a major review of the Federal Energy and Environmental Science and Technology Investments (FEESTI) as a senior member of the project team. FEESTI is a major horizontal program managed by NRCan, which involves a number of other science based Departments and agencies, including Environment Canada, Agriculture and Agri-Food Canada, Transport Canada and NRC. The study focussed on those elements funded by NRCan, including the Program for Energy Research and Development (PERD), Technology and Innovation (T&I), Climate Change Action Plan (CCAP) and Technology Early Action Measures (TEAM), as well as other federal funders and science and technology performers related to FEESTI. Issues examined included relevance, success, cost effectiveness and design and delivery. The study included a detailed examination of departmental submissions previous **evaluation** studies, in-depth interviews with managers and researchers, case studies and consultation with experts. Detailed findings and recommendations were presented to an interdepartmental workshop. Tasks included interviews with stakeholders, clients and staff; detailed document review and data analysis for major aspects of the initiative; and, the development of the report, including findings, conclusions and recommendations. (2006)
- Conducted an **evaluation** of the Forest Research Institutes support programs provided by the Canadian Forest Service of Natural Resources Canada. **Evaluation** issues such as relevance, success and cost-effectiveness / design and delivery / alternatives were addressed. The methodological approach involved the use of multiple lines of evidence and complementary research methods. **Evaluation** methodologies included the use of management and information systems; program and project document and file review; and, feedback from Institutes' staff, managers, key clients and other stakeholders (e.g. surveys, interviews). Deliverables included a draft data gathering and analysis work plan, a preliminary findings of the data gathering and analysis report and a draft final data gathering and analysis report. (2005)
- Assisted with the development of an RMAF for the Forest Research Institutes (FRI) Treasury Board Submission using the latest RMAF Guide. Components of the RMAF included profile of the program, expected results and monitoring and **evaluation** plan including **performance measurement** strategy. (2005)
- Managed the **evaluation** of the Canadian Council of Forest Ministers (CCFM) International Forestry Partnerships Program (IFPP). The review involved an assessment of four main **evaluation** issues: continued relevance, reach, success and cost-effectiveness (program design and delivery). The **evaluation** also addressed the extent to which recommendations from a 1996

- evaluation** study were implemented. The methodology included extensive file review and in-depth interviews with IFPP management and staff, members of the Board of Directors representing provinces and territories, as well as other government, industry and non-government organizations stakeholders. A special workshop session was held to develop a logic model for the program. The methodology also included the development of a detailed questionnaire for completion by Foreign Affairs Canada officers located in missions in Europe, Japan and the United States. A comprehensive report including detailed findings, conclusions and recommendations was delivered. A presentation was also given to the IFPP Board of Directors. (2004)
- Managed an **evaluation** of Forintek Canada Corporation. The **evaluation** of Forintek examined its continued relevance, objectives achievement and alternatives (design and delivery). The study utilized multiple lines of evidence to produce findings and recommendations including document and file review, client telephone survey, in-depth interviews of staff and stakeholders, limited (threshold oriented) cost-effectiveness analysis and case studies of selected projects. (2004-2005)
 - Forest Engineering Research Institute of Canada (FERIC) is a not-for-profit research organization supported by the harvesting sector of the Canadian forest industry, and the federal and provincial governments. The mission of FERIC is to provide members with knowledge and technology to conduct cost-competitive, quality forestry operations that respect the environment. The **evaluation** of FERIC examined its continued relevance, objectives achievement and alternatives (design and delivery). The study utilized multiple lines of evidence to produce findings and recommendations including document and file review, client telephone survey, in-depth interviews of staff and stakeholders, limited (threshold oriented) cost-effectiveness analysis and case studies of selected projects. This study produced some unique insights about FERIC as serving significant environmental (specifically GHG reduction) objectives – as well as industry productivity objectives. The findings have been directly used to set up the terms for the future funding of this and other Forest Research Institutes. (2004-2005)
 - Assisted with the development of an **evaluation** framework to for the **evaluation** of the contribution in support of Forintek Canada Corporation by the Canadian Forest Service (CFS) of NRCan. This project involved in-depth interviews with NRCan and Forintek management, preparation of a draft profile, a one-day workshop with key NRCan managers and Forintek representatives, development of full draft report and preparation of final report. (2003-2004)
 - Led the **evaluation** of PERD POL 6.2.1 Enhancement of Greenhouse Gas Sinks (EGGS) initiative. The **evaluation** of the initiative involved an assessment of six main **evaluation** issues: continued relevance, objectives achievement, reach, success, design and delivery and the effectiveness of the initiative's results-based management structure for planning, **measurement** and reporting. The methodology included in-depth interviews with research scientists and policy / rule makers. A special workshop session was held to refine the logic model for the initiative. Detailed cased studies were also developed. A comprehensive report including detailed findings, conclusions and recommendations was delivered. (2003-2004)
 - Managed a project to conduct an interim evaluation of the Research, Development and Deployment for Industrial Sensors and Controls (SENSCON). The main focus of the **evaluation** was assessing the success of the initiative, or the extent to which the initiative was progressing towards decreasing the energy intensity and improving the productivity of industrial processes through the development / adaptation, deployment and use of sensors and controls. The study also assessed the effectiveness of the initiative's results-based management structure for planning, measuring and reporting of **performance measurement** information and results. (2003)
 - Managed a project to conduct an interim **evaluation** of the Forest and Forest Products Initiative was completed in order to meet Treasury Board requirements. The first objective of the

evaluation assessed the initiative's progress toward meeting its objective which is the reduction of the fossil fuel intensity of Canada's forest and forestry products industries. The second objective of the study evaluated the extent to which the design and delivery of the initiative facilitates achievement of its objective including examining the effectiveness of its program structure, assessing funding and project approval processes and, identifying internal and external influences on program performance. The last objective of the study assessed **performance monitoring** and accountability functions within the initiative. The study involved document and literature review, key informant interviews and case studies on selected projects. (2002-2003)

- Managed a project to conduct an **evaluation** of Agricultural and Forestry Biomass Supply for Energy Initiative. The objectives of the **evaluation** were to: assess the initiative's progress toward meeting its objective, evaluate the extent to which the design and delivery of the initiative facilitates achievement of its objective and assess **performance monitoring** and accountability functions within the initiative. Tasks included conducting 40 key informant interviews, completing 4 case studies, and preparing a collection report, a draft **evaluation** report and a final **evaluation** report. (2002-2003)
- Managed a project to conduct an **evaluation** of the initiative to Reduce the Fossil Energy Intensity of Canada's Fishing Industry. The objectives of the **evaluation** were to: assess the initiative's progress toward meeting its objective, evaluate the extent to which the design and delivery of the initiative facilitates achievement of its objectives, and assess the **performance monitoring** and accountability functions within the initiative. Tasks included conducting 12 key informant interviews and 3 case studies, and preparing a data collection report, a draft **evaluation** report and a final **evaluation** report. (2002)
- Assisted NRCan in developing a report which combined information from 70 case studies to describe CANMET's impact. Each case study was read and analyzed to obtain a thorough understanding of their content and then a report was prepared which summarized information obtained in the case studies.
- Developed an **evaluation** framework for the Effects of Forestry Practices Science and Technology Network and Biodiversity Science and Technology Network of the Canadian Forestry Service (CFS). Also, two one-and-a-half-day workshops were held for each of the science and technology networks to establish a team performance vision, identify key performance areas and outcomes, provide a basis for **performance planning and measurement**, feed the development of the **evaluation** frameworks, profiles, issues and options, and foster a commitment to the implementation of the performance **measurement frameworks**. A brief lessons learned report was then prepared following the completion of the two **evaluation** frameworks to provide guidance for the development of other performance frameworks for the CFS Science and Technology Networks.
- Evaluated the cost-effectiveness of environment-related and light frame structure projects funded by the Department. This included a project portfolio of **performance measurement frameworks** – profiling how resources were used, who was reached, and what were the intended (and in some cases actual) results; detailed case studies which established order-of-magnitude levels of cost-effectiveness for a representative set of projects; and, conclusions on the cost-effectiveness of the projects by type and lessons learned for future programming.
- Reviewed the design of NRCan's proposed Science and Technology framework. Tasks involved assessing the risk elements inherent within the Framework (e.g., gaps, contradictions); advised Audit and Evaluation Branch management on the establishment of criteria required to measure departmental implementation of the Framework; and, also advised management on the process for reporting on sectoral progress in implementing the Framework.
- Conducted an **evaluation** study of the Mine Environment Neutral Drainage (MEND) program to report on nine issues established by an **evaluation** plan approved by the MEND Board of

Directors. This study included a document and file review; a methodology and interview guide; a telephone survey of workshop participants; interviews with MEND participants, associate participants, industry associations, and outside experts; and, three reports.

- Evaluated NRCan's (formerly Canadian Forestry Services) contribution to Forintek. A **performance measurement framework** approach was used to focus on the work. This study incorporated a document review of strategic Forintek documents; a file review of Forintek work programs, budgets, and project documentation; visits and consultations with members of Forintek staff and management; consultation with Forestry Canada stakeholders; consultations with other stakeholders; client survey of Forintek members and non-members; and case studies on a small selection of major initiatives.
- Prepared a Special Highlights Report and briefing for the Geological Survey of Canada (GSC) on the 1992-93 GSC program **evaluation** study. The final report consisted of a concise and direct summary of the key issues and sub-issues addressed in the **evaluation**.
- Participated as Project Co-ordinator in a major **evaluation** of the Geological Survey of Canada (GSC) which involved a series of case studies, a survey of clients, and several others line of evidence. The study set an appropriate **performance measurement framework** for the GSC, analyzed its key impacts and made recommendations regarding policy and program management. Several specific initiatives regarding client / user service were taken up as a result of the study.
- Conducted the **evaluation** of the Forest Protection Research Program. The study focussed on providing a comprehensive **evaluation** of Forestry Canada's role in forest protection research. Such research areas as environmental impacts, biological control and chemical risk were profiled in case studies.
- Conducted the **evaluation** study of the Forestry Engineering Research Institute of Canada (FERIC). This study analyzed the impacts of FERIC, a technology centre co-funded by the Federal Government, projects and services in terms of technology transfer to the Canadian forest industry. A survey and case studies were used.
- Conducted the **evaluation** study of the National Forestry Statistics Program (FORSTATS). The purpose of the **evaluation** was to provide assistance in the restructuring of the national statistics function.

Natural Sciences and Engineering Research Council (NSERC)

- Developed a **performance measurement framework** for the eBusiness Services Project. The framework precisely measured the success / performance of the strategy developed by the department to transform business processes in order to use internet-based tools. The performance **measurement framework** also helped establish trends and evaluated the need for mid-term correction.
- Conducted an **evaluation** of the Strategic Projects Program (SPP) to provide Senior Management with objective information to determine and analyze the impacts of the Program and its niche in the current NSERC program structure. Methodologies used included a document review, telephone survey, in-person interviews, and case studies. The report included the findings from all sources and recommendations for improvements. (1998-1999)
- Conducted the **evaluation** of the University-Government Program (UGP). This study involved the questionnaire design, file reviews, data collection and analysis, program documentation and the development of a **performance management framework**.

- The **evaluation** of the Special Microelectronics Fund (SMF) answered the management and impacts of the SMF. Alternative delivery mechanisms were considered. The study helped senior NSERC management assess their program delivery instruments.

Nova Scotia Department of Environment and Labour

- Assisted the Nova Scotia Department of Environment and Labour with the development and delivery of a **Performance Measurement** for Policymakers workshop as part of the overall Regulatory Management Curriculum. Tasks included consultations with key parties, review of key documents, development of outline; development of materials for the module; and, delivery of the pilot session. (2007-2008)

Office of the Comptroller General

- Undertook the Study of the Utilization of Science and Technology Evaluations to follow-up on the usage and results of science and technology evaluations. This involved: analyzing the science and technology initiatives of the major science and technology departments and agencies; and surveying both Directors of Evaluation and the managers of programs evaluated for their perceptions as to the usefulness of the **evaluations** and their impact on decision making.

Ontario Ministry of Aboriginal Affairs

- Assisted the Ontario Ministry of Aboriginal Affairs with the preparation and delivery of a one-day **performance measurement** training. The objectives of the training included identifying potential solutions related to **performance measurement** for Aboriginal programs and policies in Ontario. It was a starting point for integrating /aligning any / all work being done in the Ministry on **performance measurement** and laid the groundwork for the development of a **performance measurement framework** and a report card to assess the overall achievement of desired outcomes related to Ontario's Corporate Aboriginal Strategic Course of Action. The training used a hands-on approach, drawing on practical examples and experiences of participants and the facilitator and involved a pre training session survey. (2009)

Parks Canada

- Assisted with the development of appropriate **performance measurement** indicators for eleven business cases. Provided expert advice to management teams in ten national parks on **performance measurement**, indicator development and performance reporting in support of the development of business cases to obtain funding for multiyear projects to improve ecological integrity within the national park. (2004)

Privy Council Office (PCO)

- Assisted the Privy Council Office to develop a results framework plan, with specific reference to regulatory governance and smart regulation initiatives, key results and progress indicators and an implementation and reporting strategy. Tasks included project familiarization, interviews / consultations, conducting PCO workshops, conducting stakeholder workshops / briefings and finalizing the results plan and commitments. (2004-2005)
- Assisted the Privy Council Office and the External Advisory Committee in Smart Regulation (EACSR) to develop an **evaluation** framework for the Smart Regulations initiative of the Government of Canada. Conducted interviews, designed and conducted workshops and briefings, and prepared the final **evaluation** framework. (2003)
- Assisted the PCO with a review of current results management practices in key Canadian federal regulatory agencies. The intent was to assist the PCO to identify and disseminate best Canadian practices in measuring outcomes. The objective of this study was to assess how Canadian

Federal Departments measured the results and effectiveness of their regulatory programs. Specifically, this project examined:

- how and when regulatory **performance measurement** indicators are developed; and,
- how regulatory results are captured, transmitted, and communicated.

Document reviews, interviews and case studies were reviewed in the context of two analytical frameworks which were used to guide the examination of the **regulatory** agencies. First, agency 'performance orientation' was examined to determine the principles guiding the program management of each agency. Second, our study attempted to discern the 'level of implementation' of results management practices in each case example. Both of these frameworks were applied to the agencies in the study scope in order to better understand the current state of results management practice.

The report was well received, approved by all parties – and formed the basis for subsequent workshops and policy development in this area. (2002)

Public Health Agency of Canada (PHAC)

- Assisted PHAC with the development of a high level results chain (i.e. Logic Model). Methodology included meetings, document review, interviews / consultations, preparation of draft and final logic model and a summary report. (2009)
- Assisted PHAC with a study to scan the literature regarding evaluating / measuring the impact of surveillance. The findings were summarized and a basic results logic for the PHAC surveillance function was suggested. Methodology included meetings, interviews and literature review. Deliverables included a draft final report that presented all of the data collected, identified themes emerged and suggested an appropriate results model for PHAC surveillance. (2008)
- Assisted PHAC with the development of a **Performance Measurement Framework** and the associated Governance Structure. At the completion of this project, PHAC provided TBS with both draft and final submissions to comply with Management, Resources and Results Structure Step 2 requirements and timelines. Deliverables included an action plan for implementing **performance measurement and reporting**, including timelines, responsibilities and a recommended report format for presenting integrated financial and non-financial performance information. (2007-2008)
- "The objective of the "Clarification of Internal Roles and Responsibilities for the Integrated Strategy on Healthy Living and Chronic Disease" project was to develop and test a process that allowed the roles and responsibilities of the Diabetes Strategy within the ISHLCD to be articulated and clarified. Methodology involved using a Linear Responsibilities Chart (LRC) to describe and then examine different aspects of key decision-making processes for the Diabetes Strategy within the ISHLCD. The LRC illustrated the roles played by various participants in the delivery process. Methodology included document review, workshop design and facilitation, development of draft roles and responsibility template each for the key decision-making areas, analysis of completed roles and responsibilities templates, reporting and senior management briefing. (2007)
- Assisted PHAC with Step 1 of their Management, Resources and Results Structure development, Strategic Outcomes and Program Activity Architecture. Deliverables included advisory assistance with regard to strategic outcome / Program Activity Architecture results statements and early help with **Performance Measurement Framework** development. (2007)
- Assisted PHAC with an Implementation Review: Year 1 of the Integrated Strategy on Healthy Living and Chronic Disease. This Strategy represented a new way of engaging staff and stakeholders in addressing public health issues using an integrated approach. Tasks included: literature review; **preparation of an evaluation plan** with sampling strategy, and data collection and analysis methods; develop data collection tools such as interview guides; and collect,

summarize and analyze data. Deliverables included an **evaluation** plan, a report with summary of themes emerging from survey and areas for probing in interviews, a final **evaluation** report and PowerPoint presentation, a draft engagement continuum and **measurement strategy**, a draft report on operationalizing engagement and a final report on operationalizing engagement. (2006-2007)

- Developed an umbrella Results-based Management and Accountability Framework (RMAF) for the Integrated Healthy Living and Chronic Disease Strategy for PHAC. Tasks included attending meetings, document review, develop and finalize structure and process for the umbrella RMAF development, meet with TBS analysts as required, develop and facilitate workshop, summarize and analyze data, participate in follow-up meetings as needed and develop draft and final Umbrella RMAF. Deliverables included a draft RMAF report and a final RMAF report which included **performance measurement and evaluation** strategies. (2005)
- Assisted PHAC to draft and refine the CIDPC's Program Activity Architecture for submission to Treasury Board in March 2005. Tasks included the review of existing CIDPC materials, including existing results plans, indicators and reports and previously established draft Program Activity Architecture indicators, development of a basic results logic model based on this work, consultations and briefings with select CIDPC staff. Deliverables included various results chains and Program Activity Architecture **performance measurement framework** related documents outlining strategic outcomes, Program Activity Architecture statements, and **performance measurement framework** suggested indicators / indicator clusters, including the consideration of the governance and management of the **performance planning and management** function. (2005)
- Designed and facilitated a half-day meeting on the **evaluation** services and approaches needed for the Centre of Excellence for Program Design and Evaluation. Tasks included a review of **evaluation** systems and literature, meeting, workshop presentation / facilitation, preparing summary of the workshop outputs, and providing follow-up advice on next steps. (2005)

Public Service Commission (PSC)

- Assisted Public Service Commission of Canada with the development of a Staffing Management Accountability Framework (SMAF). The objective of the assignment was to provide an analytic report in the context of Leading Indicators in relation to SMAF (consistency with SMAF; potential to clarify / refine SMAF reporting requirements; and potential to reduce SMAF reporting burden). Tasks involved project initiation meeting, document review and consultations. Deliverables included draft analytical report, briefing and final analytical report. (2007)

Science Council of Canada

- Conducted the **evaluation** of Canada-Japan Science and Technology Agreement 1988. Tasks involved examination of the progress of projects assisted under this agreement. Recommendations were made on design and delivery.

Société Franco Manitoabaine

- Developed an **evaluation** framework for a five year agreement to be established between the Government of Canada (Secretariat of State) and the franco-manitobaine community (Provincial Planning Committee). The **evaluation** framework study included four elements: 1) a logical framework; 2) identification of fundamental **evaluation** issues; 3) an **evaluation** approach; and 4) an **evaluation** plan. Nine **evaluation** issues were identified. The study involved the review of some pertinent documentation and working session with the SFM's special advisor and negotiator for the Agreement.

Spinal Cord Injury Solutions Network

- Assisted the Spinal Cord Injury Solutions Network with the development of a results-based strategic framework and provided advice and guidance on a **measurement strategy**. Also assisted with the design and facilitation of a results-based planning session and provided advice on how to meet monitoring and **evaluation** requirements for Health Canada (HC). Further assisted with the development of a Results-based Management and Accountability Framework (RMAF) for the HC funded portion of the network's activities. Tasks involved facilitating four planning sessions in Toronto and Vancouver, participating in debriefs and preparation of the RMAF following HC RMAF assessment guide. (2008)

Transport Canada (TC)

- Assisted Transport Canada (TC) with the preparation of a horizontal **performance management framework** for the Asia-Pacific Gateway and Corridor Initiative (APGCI). Similar to an RMAF, this horizontal initiative included Transport Canada (TC), Canadian Border Security Agency (CBSA), Department of International Trade and Foreign Affairs (DFAIT), Parks Canada and Western Economic Diversification (WD). Tasks included consultation and coordination with the departments involved in order to define their objectives, responsibilities and **performance measurement**, facilitation of multilateral sessions leading to the development of the logic model and **performance measurement** strategy and development of the **performance management framework** including a logic model and **performance measurement** strategy. (2006)
- Co-managed the **evaluation** of the Central Research and Development Program. The study was divided in two phases: the preparations of an **evaluation** planning memorandum to outline the approach for the study; and the **evaluation** phase which determined the continuing need for the Central R&D program at Transport Canada. The study examined issues relating to the resourcing, design and delivery of the R&D programs run by the group. Organizational alternatives were also considered as part of the study scope.

Treasury Board Secretariat (TBS)

- Assisted with the development of case studies to provide clear examples of how to implement the TBS Guidelines for the **Performance Measurement** and Evaluation (PMEP) for regulatory initiatives under the Cabinet Directive on Streamlining Regulations (the CDSR). This assignment involved two case studies and focused on the effectiveness of regulations to address public policy issues. (2008-2009)
- Assisted TBS through the provision of advice on best practices in **performance measurement** in the public sector and revision of the department's Program Activity Architecture. Methodology included leading working sessions with Offices of Primary Interest (OPIs) across TBS Sectors and development of results statements. Deliverables included direct assistance characterising the nature of the TBS performance story, the provision of a results chain framework approach – including the characterization of strategic outcomes, Program Activity Architecture statements, and a modified **performance measurement framework** suggesting indicators, and the consideration of the governance and management of the **performance planning and management** function (i.e. responsibility for collection / analysis). This work formed the blueprint for the completion of the TBS **performance measurement framework**. (2007-2008)
- Provided advice and support in the development of the Performance Measurement Framework for the Treasury Board Secretariat (TBS), in relation to its Program Activity Architecture (PAA) and advancing results-based management. Tasks included providing advice on best practices in performance measurement in the public sector and the development of department-wide performance measures, facilitate working group discussions, advise project leads on the framing of the PMF, and review and advise on key products, including presentation decks for consideration by senior management. (2007)

- Examined the Treasury Board Secretariat's issue brief summarizing the history and development of the Whole of Government Framework, its 3 broad areas and 13 Government of Canada outcomes, the current set of indicators, the current application of the framework, a description of the reports that were envisioned, and other relevant background information. The issue brief contained assumptions and questions around accountability, attribution, **performance measurement**, to which response was required. This response provided formed the main deliverable of this project. Deliverables included participation in teleconference calls and in-person meetings, development of draft Issue Brief Response Paper and other relevant thoughts, revised Response Paper drafts (up to two revisions as necessary) addressing TBS comments made on previous drafts and final copy of the Issue Brief Response Paper. (2006)
- Assisted TBS with the development of a basic framework and short set of guiding principles as part of the Management Results and Resources Structure and corporate measurement strategy in federal government departments. Deliverables included a document describing the framework, its main principles and the key steps involved in developing a **performance measurement strategy** of this nature. (This work contributed to **RDIMS 494225**.) Deliverable also included a short discussion paper, characterising the nature of the department performance story, the provision of an alternative framework approach – including the characterization of strategic outcomes, Program Activity Architecture statements, and a modified **performance measurement framework** suggested indicators / indicator clusters, and the consideration of the governance and management of the **performance planning and management** function. (2003-2004)
- Development of criteria and guidance for assessing **evaluation** reports. Principles used to conduct this assignment included developing a report assessment tool, seeking out informative examples, developing the model with the engagement of the (target) communities of practice and using the criteria with modesty. This included a review of **evaluation** systems. (2002)
- Developed an **evaluation** framework for the policy review of the contracting status of the Canadian Corps of Commissioners (CCC). This framework provided the practical vision of the policy in terms of activities, outputs, reach, direct impacts, and long-term impacts. The framework established the context, orientation, and methodologies for future **evaluation** of this policy. Methodologies included document reviews, interviews and a half-day workshop.

Performance and Management of Studies

- As an Evaluation Manager in the DRIE Program Evaluation Branch, and as a private consultant managed over 50 evaluation projects ranging from short one person studies to major projects involving as several hundred thousand dollars in budget and over a dozen professionals. Performed evaluation projects for fifteen government departments within the last four years. Also, experienced in the use of electronic data processing for studies and other aspects of the planning and management of evaluation.

Interdepartmental Development Work

- Developed innovative techniques for the performance of evaluation including computerized content analysis methods, a new form of interview guide for role review and a conceptual model for R&D evaluation. Participated on an interdepartmental committee, chaired by the Office of the Comptroller General, on the evaluation of R&D programs. Reviewed state of the art evaluation practices for NRC, MOSST and OCG.

Project experience details for Mr. Montague's other areas of expertise are available upon request but have not been included here due to the "*Evaluation and Performance Measurement*" focus of this proposal.

SUZANNE J. LAFORTUNE

Partner

EDUCATION: University of Ottawa, B.Comm. (1978)

PROFESSIONAL

AFFILIATIONS: Canadian Evaluation Society
American Evaluation Association

BACKGROUND:

Suzanne Lafortune is a partner and founding member of Performance Management Network Inc. She has more than thirty years of consulting experience. During that period she has been involved in over 600 research projects. Her qualifications include an honours degree in business complemented with special training in questionnaire design and data collection from Statistics Canada. She has been involved in program evaluation, performance measurement, performance monitoring, and survey research studies. Suzanne is fluently bilingual.

OVERVIEW OF EXPERIENCE:

Program Evaluation

Managed or played a major role in several program evaluation studies for numerous federal and provincial government departments including: Atlantic Canada Opportunities Agency, Industry Canada, Fisheries and Oceans, Canadian Heritage, National Research Council, Ontario Ministry of Community and Social Services and many others.

Performance Management

Led the development and implementation of performance-based management systems in several public sector and not-for-profit organizations. Provided training, facilitation, and analytical assistance to a broad range of organizations. Specific areas of focus have included the development of performance measures, benchmarking, performance reporting, and change management.

Survey Research

Has managed or played a major role in over 600 studies involving surveys. Is experienced in managing studies involving in-person, telephone, mail, email and internet surveys. Has managed surveys involving as few as 50 respondents and as many as over 10,000.

Focus Groups

Has extensive experience in moderating focus groups in both English and French. Has moderated focus groups with senior executives, other business representatives, adults, teens and children. Has moderated focus groups on such varied subjects as business development, tourism, mascots, restaurants, advertising, Total Quality Management, and others.

EXPERIENCE:

Agriculture Adaptation Council (AAC)

- ▶ Conducted a survey of a sample of clients of projects funded by the Agricultural Adaptation Council (AAC). The surveys touched on the usefulness of, and satisfaction with, various aspects of the projects. The study involved data collection activities, analysis, and report writing. (1998)

Agriculture and Agri-Food Canada (AAFC)

- ▶ Assisted in developing a results-based logic model and performance indicators for all parties involved in the Food Safety and Quality (FSQ) component of the Agriculture Policy Framework. (2004)
- ▶ Facilitated two workshops, each two days in length to help in the development of logic models and performance measurement strategies for new environmental initiatives at AAFC. (2002)
- ▶ Facilitated a two-day planning workshop and assisted in the development and pilot implementation of performance measures. This included preparing for and delivery of the presentation for the Adaption Division and Industry Initiatives to develop performance frameworks and measurements; provided Adaption with assistance in the refinement of program frameworks; and assisted in the development and analysis of specific Adaption pilots. (2000)
- ▶ Conducted the review of AAFC Food Production and Inspection Branch Laboratories which involved profiling the food laboratories; assessing the relevance, success, and cost-effectiveness of current operations; evaluating any opportunities for cost reductions; and, assessing performance against desired results of current revenue generation initiatives. Methodologies included document reviews, interviews, and fieldwork at three laboratories (i.e., Ottawa, Calgary, and Guelph). (1992)

Association of Municipalities of Ontario (AMO)

- ▶ Managed a summative evaluation of the Federal Gas Tax Fund (GTF) and Public Transit Fund (PTF) in Ontario. The purpose of the evaluation was to report on the progress of the GTF and PTF towards final outcomes to date and to determine what adjustments should be made to ensure success of the programs by the end of their funding periods. The joint evaluation examined both the success and progress of the programs and their cost-effectiveness. Study methodologies included a document and literature review, secondary data analysis, 30 in-depth interviews, a telephone survey of 150 ultimate recipients, and four case studies. Individual lines of evidence technical reports were required as well as an integrated summative evaluation report. (2008)

Atlantic Canada Opportunities Agency (ACOA)

- ▶ Completed an impact evaluation of four program sub-activities under the Community Development Program Activity: Community Investment, Community Development Resources, Official Languages Minority Communities and Aboriginal Communities. The purpose of the evaluation was to assess the extent to which the four program sub-activities are fostering the economic development of Atlantic communities. It focussed on results achieved through their funding vehicles, and assessed the effectiveness and efficiency of the program sub-activities in meeting government-wide economic objectives. The evaluation involved a document review, data analysis, 85 in-depth interviews with a range of program stakeholders, a survey of 350 funding recipients and 150 collaborators and 10 case studies. (2008-2009 – ongoing)
- ▶ Developed Strategic Outcome Umbrella Results-based Management and Accountability Framework (RMAF) for ACOA. The objective of this project was to complete the development of

one umbrella RMAFs for ACOA's strategic outcome and three program activities (Enterprise Development, Community Development and Policy, Advocacy and Coordination). The study involved an extensive document review, meetings / interviews with program officials and round table discussions. The RMAF was intended to incorporate all Treasury Board requirements, changes in ACOA's structure and expressed concerns over the existing draft documents. (2008-2009)

- ▶ Managed a summative evaluation of the Strategic Community Investment Fund (SCIF), a community infrastructure program aimed at community economic development. The purpose of the evaluation was to assess the relevance, effectiveness / success and cost-effectiveness of SCIF, which ended in March 2005. The methodologies include a document and literature review, a file review, database analysis, key informant interviews, case studies and two telephone surveys. As team leader, responsible for all aspects of the study and involved extensively in the design, analysis and reporting tasks, including presentations to the Steering Committee. (2007-2008)
- ▶ Completed a study to assess the results of a project of the Atlantic Innovation Fund (AIF). The project organization, Springboard, was applying for renewed funding. In this context, ACOA required information related to Springboard's performance in order to decide on approval for renewal. Completed a document review and a series of in-depth interviews with representatives of university Technology Transfer Offices, Springboard staff, ACOA staff, university presidents and other national and international organizations. (2007)
- ▶ Managed a review of the Lean Manufacturing component of the Innovation and Skills Development Initiative (ISDI) for ACOA's New Brunswick office. The purpose of the study was to assess the results of this initiative to help management decide on future endeavours related to productivity improvement. The study involved a document review, in-depth interviews, a survey of recipients and a market scan of other initiatives and trends regarding productivity improvement. As team leader, was involved in all aspects of the study and was responsible for all analysis and reporting tasks, including a presentation of the results to management and staff. (2007)
- ▶ Developed an evaluation framework for ACOA's advocacy function for an upcoming implementation evaluation of the function. The project involved a workshop to help develop a logic model for the function as well as preliminary evaluation issues, follow-up consultations and document / file reviews. Was responsible for the preparation of the evaluation framework document which will include a profile, logic model, evaluation issues and indicators, evaluation methods, an evaluation issues / indicators / methods matrix, evaluation costs, evaluation timing and evaluation reporting requirements. (2007)
- ▶ In partnership with Hickling Arthurs Low (HAL), assisted in the development of Results-based Management and Accountability Frameworks (RMAFs) for ACOA's three Program Activities (Enterprise Development, Community Development, Policy Advocacy and Coordination) as well as in the development of an umbrella RMAF for ACOA's Business Development Program. Role included familiarization, the facilitation of nine workshops for the Program Activities as well as some of its Program Sub-Activities to help develop logic models and performance measurement strategies, ongoing support in the revisions of the logic models and performance measurement strategies, advice on implications for the PAA, and expert advice / support in the development of other parts of the RMAFs. (2006)
- ▶ Facilitated a 1½ day workshop with ACOA's Sustainable Development Strategy Working Group to help the members develop an understanding of key components of logic models, prepare a logic model for the strategy and identify useful measures for ongoing performance measurement. (2006)
- ▶ Provided expert advice in the development of a RMAF for the Goose Bay Development Fund (a fund aimed at economic development in a region affected by the potential loss of a major

employer) which included a profile, expected results, and monitoring and evaluation strategies. This was done through a one-day workshop to help develop a common understanding of the key components of the RMAF, facilitate the development of a logic model for the Fund, and identify useful performance measures, based on the logic model. Also provided follow-up advice related to various parts of the RMAF. (2006)

- ▶ Provided coaching and advice on the development of ACOA's Social Economy Initiative RMAF based on the draft horizontal RMAF (H-RMAF) for the Social Economy Initiative and the Treasury Board RMAF Guidelines. (2005)
- ▶ Developed a RMAF for the Innovative Communities Fund (ICF), a community infrastructure program aimed at community economic development. Conducted a review of relevant documentation, a workshop to present the principles of logic models and develop the ICF logic model and its performance indicators, follow-up consultations, and the preparation of the RMAF document. The RMAF set forth the profile, expected results and monitoring and evaluation plan for the ICF and has been approved by TBS. (2005)
- ▶ Subsequent to helping program management develop a performance measurement strategy, helped in the development of an updated RMAF for the AIF. This included coaching and advice related to the then recently introduced new TBS RMAF guidelines. (2005)
- ▶ Developed a performance measurement and evaluation strategy for the AIF. The objectives of the project were to review the initial AIF RMAF (i.e. for relevancy), agree on a high level approach to how the summative evaluation could be conducted, identify appropriate timing for the evaluation, determine whether the current performance measurement system (BMTS) would be sufficient for reporting on the program's results and also to advise on the appropriateness of the benchmarking concept. Further, also researched what other jurisdictions' results are from investment in R&D projects, to determine an expected ratio of "successful", "semi-successful", and "failed" projects to apply in the summative evaluation of the AIF. Facilitated involved a workshop involving regional program representatives, completed a review of AIF documents, consulted with representatives of other innovation programs and also a reviewed relevant documents on these programs. Prepared the final report which included a revised AIF logic model and the performance measurement and evaluation strategies for the AIF. (2004)
- ▶ As team leader, completed a formative evaluation of the Women in Business Initiative (WBI). The evaluation focussed on how the program was being implemented, whether adjustments were necessary, whether progress toward the achievement of the initiative's outcomes was occurring, and whether there were early indications of effectiveness. Results were used for decision-making in adjustments needed to the design or implementation of the initiative in order to ensure the intended outcomes were being achieved. Methodologies included: review of documents; data review; telephone surveys of 401 clients and 100 business service providers; 50 in-depth interviews with ACOA WBI representatives, ACOA management, representatives from other ACOA programs, representatives from other government departments, representatives of provincial / regional organizations and a representative from Consulting and Audit Canada; and, a benchmark study of three selected organizations (Human Resources and Skills Development Canada (HRSDC) Self Employment Initiative, Western Diversification (WD) Women's Enterprise Initiative, US Office of Women's Business Ownership). (2004)
- ▶ Managed a formative evaluation of the AIF for ACOA. The evaluation involved a review of documents, a review of a sample of 22 applicant files, a database review, a telephone survey of 50 recipients, a telephone survey of 66 not approved applicants, a telephone survey of 20 project partners, and 33 in-depth interviews with ACOA representatives, members of the AIF Advisory Board, institutional / organizational representatives and representatives of national R&D agencies. The final report presented findings, conclusions and recommendations on issues of relevance, implementation and cost-effectiveness / success. (2003-2004)

Canadian Child Care Federation

- ▶ Managed an evaluation of the Canadian Child Care Federation (CCCF). The evaluation methodologies included: review of internal and external documents and internal information systems, 30 interviews with CCCF management and staff (5), Board members and affiliates and others (15) and other stakeholders (10). The report addressed formative issues related to the Federation's relevance, its success, its cost-effectiveness, and the appropriateness of its results-based management systems. (2005)
- ▶ Developed a detailed evaluation plan with evaluation issues, indicators, approaches, costs and data collection instruments expanding on the Federation's Results-based Management and Accountability Framework (RMAF). (2003)

Canadian Coalition for Agricultural Safety and Rural Health

- ▶ Conducted a survey of the Canadian Coalition for Agricultural Safety and Rural Health clients of projects funded through the Canadian Agriculture Safety Program (CASP). The survey helped assess the usefulness of, and client satisfaction with, various aspects of the projects. The study involved conducting data collection, analysis, and report writing. (1998)

Canadian Council of Archives

- ▶ As team leader, conducted the program evaluation of the Canadian Council of Archives (CCA). The study involved gathering information on the impacts of CCA activities and programs through generic program evaluation issue areas: user relevance, impacts and effects, objectives achievements, and alternatives. (1992-1993)
- ▶ Participated in the review of the Secretariat to determine if its structure and resources are appropriate to the current needs of the CCA. Methodologies included file reviews and interviews. (1994)

Canadian Food Inspection Agency (CFIA)

- ▶ Managed a formative evaluation of the National Aquatic Animal Health Program (NAAHP), a program which is co-delivered by CFIA and Fisheries and Oceans Canada (DFO). The purpose of the evaluation was to assess the relevance and performance (effectiveness, economy and efficiency) of the NAAHP and to inform future programming efforts. The study involved preliminary consultations, the development of a work plan and evaluation framework (with profile, logic model, evaluation issues and methodology), data collection, analysis, reporting and presentations. (2009 – ongoing)
- ▶ Managed a formative evaluation of the NAAHP, a program which is co-delivered by CFIA and Fisheries and Oceans Canada (DFO). The purpose of the evaluation was to assess the relevance and performance (effectiveness, economy and efficiency) of the NAAHP and to inform future programming efforts. The study involved preliminary consultations, the development of a work plan and evaluation framework (with profile, logic model, evaluation issues and methodology), data collection, analysis, reporting and presentations. (2009)
- ▶ Produced of an updated plan for evaluations at CFIA. The purpose of this study was to develop a report identifying evaluation priorities for three years and five years, based on risk and other significant factors affecting Agency operational effectiveness. Some documents for briefing senior management were also development. The project required a review of documents and the finalization of evaluation work already underway with staff at the Agency. (2008-2009)
- ▶ A report provided to the Canadian Food Inspection Agency (CFIA) in November 1997 outlined a corporate performance measurement system for CFIA. This project assisted CFIA to develop

performance measurement systems for the various levels within the Agency. This was accomplished through weekly Task Force meetings as well as through the development of 14 Performance Measurement Guides for senior and operational managers within CFIA. (1998)

- ▶ Assisted CFIA to develop key results and performance measures. The project developed key expected results and associated performance measures and indicators for each strategy / priority; provided advice on the Agency's performance measurement systems to provide performance measures for the expected results; provided advice and support to managers on how to integrate the divisional level program and operational performance measurement and reporting framework with the Agency's framework; and, provided preliminary cost estimates of implementing the proposed Agency strategies. Methodologies used in this assignment included document reviews, interviews, and performance framework development sessions. (1997)

Canadian Heritage (PCH)

- ▶ Managed a review and formative evaluation of the 2010 Federal Secretariat (FS). The purpose of the review was to provide PCH senior management with assurance that management controls, risks management frameworks and overall governance structure were effective and adequate. The purpose of the formative evaluation was to assess the performance of the FS and assess the extent to which federal investment and activity was advancing the Government of Canada's stated objectives and fulfilling its expected results. The study involved document, file and database reviews and 40 key informant interviews. Four technical reports were prepared, one for each line of evidence and one for the review component. The final report provided an integrated analysis of the findings from all sources, and a series of conclusions and actionable recommendations. (2007-2008)
- ▶ Provided assistance and advice to complete an integrated Results-based Management and Accountability Framework and Risk Based Audit Framework for "A Canada for All: Canada's Action Plan Against Racism". (2004-2005)
- ▶ Assisted Canadian Heritage (PCH) prepare a Results-based Management and Accountability Framework (RMAF) and Risk Based Audit Framework (RBAF) for the Movable Cultural Properties Program. The project involved a comprehensive document review, development of a logic model, performance measurement strategy, an evaluation strategy and reporting strategy. (2002-2003)
- ▶ Managed an evaluation of the 2003 Canada Winter Games. The evaluation involved a wide range of evaluation methodologies including interviews, database analysis, focus groups, surveys and a mystery shopper approach to validate compliance with official languages requirements. (2002-2003)
- ▶ Developed a performance measurement strategy for the Canada New Media Fund, an initiative of the Canadian Internet Cultural Content Initiative (CICCS) administered by Telefilm Canada. This involved a workshop with representatives of CICCS and Telefilm, as well as follow-up consultations. (2002)
- ▶ Managed a project to update a Results-based Management and Accountability Framework (RMAF) for the Historical Places Initiative (HPI). This involved a series of workshop-type meetings with departmental representatives to refine the logic model and performance measurement strategy. (2002)
- ▶ Developed a logic model and performance measurement strategy for the Canada Portal, a new departmental initiative. The project involved literature review, meetings with key staff and a half day workshop. (2001)

- ▶ On two separate occasions, revised a Results-based Management and Accountability Framework (RMAF) for the Canadian Digital Cultural Content Initiative (CDCCI) now known as the Canadian Internet Cultural Content Strategy (CICCS) – for Parts I and II. Revisions to the frameworks involved reviewing relevant documentation to understand the addition of new initiatives, co-deliverers, and distribution of resources and their impacts on the RMAF; and consultations with PCH / CICCS staff on the changes and their impact. The revisions made ensured that the most current guidelines of the Treasury Board Secretariat (TBS) regarding RMAFs were met. (2001)
- ▶ Provided ongoing support to CICCS management in the context of its performance reporting requirements over a six-month period. (2001)
- ▶ Designed and delivered a bilingual half-day workshop for the Human Resources Branch at Canadian Heritage. The workshop increased the participants' awareness and understanding of the key principles, techniques, and processes of performance-based measurement. (2001)
- ▶ Conducted a one-day workshop held for representatives from the Official Languages group of PCH. The purpose of the workshop was to explain the basic principles of results-based management, and develop the performance framework and performance indicators with the workshop participants. (2000)
- ▶ Conducted a one day workshop on results-based management. The workshop focussed on various models of performance frameworks and lead to the adoption of one such model by the group. (2000)
- ▶ Assisted in developing an accountability framework and identifying preliminary measures for the Cultural Sector Trade Opportunities Program (CSTOP) as per Treasury Board requirements. The process of developing the framework, performance measures, and data sources included reviewing literature and conducting telephone interviews and / or in-person consultations with departmental staff who work in close relation with the different cultural sub-sectors. (2000)
- ▶ Designed and delivered a bilingual Cultural Development workshop on performance. The workshop increased participants' knowledge and awareness of performance measurement, accountability and various techniques in developing a performance measurement frameworks. (2000)
- ▶ Assisted in developing a performance framework and identifying preliminary measures for the proposed First Works initiative. Conducted a two day workshop with the First Works team. During the first day of the workshop, introduced the principles of performance management and lead a discussion in the development of a performance framework for the proposed initiative. The second day of the workshop focussed on reviewing the performance framework and determining if further refinements were required and key performance measures were developed. (2000)
- ▶ Developed a results-based performance measurement framework with performance indicators for the Canadian Digital Cultural Content Initiative (CDCCI). This study involved the development of a performance measurement framework. This involved reviewing literature to develop an understanding of the program and its environment; conducting telephone interviews and / or in-person consultations with departmental staff to develop a preliminary performance framework; and, conducting two workshops with departmental staff members, co-deliverers, and stakeholders, to confirm the products from the interviews, develop performance measures, data sources, and identify gaps and key evaluation issues. (2000)
- ▶ Developed two evaluation frameworks one for the Publication Assistance Program and another for the Canada Magazine Fund to assist Cultural Industries Policy to support and reinforce its planning and management processes. The approach used to develop the frameworks involved comprehensive document reviews, preliminary interviews, designing and conducting two performance framework development sessions with key stakeholders. The project also involved

conducting interviews with program staff (in-person) and telephone interviews with a sample of industry representatives / partners to identify and confirm potential evaluation issues, performance measures, performance indicators, data sources and strengths and weaknesses. A one-day training session was designed and delivered to managers and staff on the development of the framework and its use in future planning, measurement, evaluation and reporting. (2000)

- ▶ Assisted in the development of an evaluation and performance framework for the Book Publishing Industry Development Program (BPIDP) which will assist the program to make incremental changes to measure BPIDP effectiveness and accountability. The project involved reviewing literature and past evaluations to develop an understanding of the program and its environment. A workshop was conducted with five departmental staff members to develop a preliminary performance framework and five telephone interviews and / or in-person consultations with departmental staff were held to confirm the products from the workshop, and develop performance measures, data sources, and gaps, as well as to identify key evaluation issues. (2000)
- ▶ Assisted Canadian Heritage to develop an evaluation framework for the implementation of Sections 41 and 42 of the *Official Languages Act*. The study involved document reviews, four workshops, and follow-up interviews. The report presented the performance framework for the implementation of Sections 41 and 42, including key results; evaluation issues to be considered for future evaluations; and, the principles to develop a performance measurement strategy. (1999-2000)
- ▶ Developed an evaluation framework for the Young Canada Works (YCW) Program. The study identified a performance measurement strategy for the program as well as key evaluation issues to be considered for future evaluations. The study involved document reviews, two workshops, and in-depth interviews. The report identified all information gathered along with two costed options for a future evaluation of the program. (1999-2000)
- ▶ The agreement between Canadian Heritage and the Franco-Ontarian community requires a yearly evaluation of the agreement. The evaluation involved the development of a performance framework for the agreement, identification of a series of evaluation issues, the development of an interview guide, and a series of individual or group interviews with representatives of the department and the community. The report presented findings by issue and recommended on improvements to future agreements. (1998-1999)

Canadian Institutes of Health Research (CIHR)

- ▶ Developed a RMAF for the CIHR / Rx&D Collaborative Research Program, which is a partnership between CIHR and Canada's Research-based Pharmaceutical Companies to support health research of interest to the industry and the public health research community. The program is in transition and requires the development of a performance measurement strategy and a plan for an upcoming evaluation. The study includes document review and in-depth interviews with key stakeholders. (2006-2007)
- ▶ Developed an evaluation framework for the Operating Grants Program. The project involved 30 expert interviews with individuals represent the various organizations and fields in health research. The framework was presented to a steering committee comprising of Canadian and international experts in the area of health research. (2001-2002)
- ▶ Developed and delivered training to managers from the various Institutes on performance management, in particular on the principles of developing valid performance measures. (2001)

Canadian Intergovernmental Conference Secretariat (CICS)

- ▶ Completed a study to help CICS refine and finalize its Measurement Resources and Results Structure (MRRS), develop a performance measurement framework (PMF), develop the tools required for ongoing performance measurement and collect the first year of data to help in pilot testing the PMF and tools, update the MRRS and set performance targets based on the pilot test results. (Ongoing to 2009)

Canadian Paediatric Society (CPS)

- ▶ Assisted the CPS in the development of a performance measurement and evaluation strategy for the Healthy Active Living Strategy (HAL), as well as conducted a brief intercept survey of 83 members about Health Canada's Physical Activity Guide at the Society's professional development forum. (2004)

Canadian Space Agency (CSA)

- ▶ Assisted the CSA on the subject of performance-based management. Developing performance frameworks at the Agency level and at the Service Line level; developing key results statements; drafting the Planning, Reporting and Accountability Structure document; and, conducting consultation meetings with senior management to finalize the performance frameworks for the Agency as well as for the individual Service Lines. (1997-1998)

Citizenship and Immigration Canada (CIC)

- ▶ Provided ongoing support to the Settlement Contribution Program in developing data elements for all its program components in the context of implementing a new online system to contribute to performance measurement requirements. (2002)
- ▶ Delivered three one-day workshops to departmental staff in headquarters and in the regions on the Treasury Board requirements to RMAFs and on how to develop RMAFs. (2002-2003)
- ▶ Was responsible for developing a one-day workshop tailored to the needs of the department on RMAFs. The workshop was offered to five groups within the department. (2002)
- ▶ Gathered and analysed information for, and prepared, the draft and final report on departmental review from the Deputy Minister of Citizenship and Immigration Canada (CIC) to the Secretary of the Treasury Board. This involved identifying sources for, and obtaining information needed to, compile the list and the description by reviewing audit and evaluation reports, annual plan documents, results to date, and plans for other key CIC review work; interviewing staff and senior departmental managers; analysing the information collected from the perspective of meeting Treasury Board's reporting requirements; and preparing the final list and description. (1995)
- ▶ Facilitated a workshop and developed a "Tool Kit" for managers on Service Standards and Risk Management. The tools in the kit were: a Service Standards Methodology; a Risk Management Framework; and, a Risk Management Decision Process. The tools were developed specifically to link service standard and risk management considerations. (1995)

City of Ottawa

- ▶ Developed and delivered a one-day performance measurement workshop to City of Ottawa staff involved in developing performance measures for the various components of the City's Vision 2020. (2002)

Conseil pour le développement de l'agriculture du Québec (CDAQ)

- ▶ Conducted a survey of a sample of clients of projects funded by CDAQ. The survey helped assess the usefulness of and client satisfaction with various aspects of the services provided by CDAQ. The study involved data collection activities, analysis, and report writing. (1999)

Correctional Services Canada

- ▶ Conducted a series of in-depth interviews in selected Quebec penitentiaries to assist in the evaluation of a special inmate adult education program. Interviews were conducted in French with administrators, staff, and inmates. (1986)

Court Administration Services (CAS)

- ▶ Facilitated two sessions with managers to develop logic models, identify performance indicators and targets for each program activity in the CAS's MRSS. As a result of these workshops, developed a performance management framework for the CAS. (2007-2008)

Elections Canada

- ▶ Assisted Elections Canada (ElecCda) in designing the Post-electoral evaluation framework. The purpose of the evaluation was to identify recommendations to improve the electoral processes within each respective department process within each respective department. The project involved document reviews, interviews, development of a logic model, development of a performance measurement strategy and, report preparation and delivery. This project involved a high level of input from numerous stakeholders. (2000)

Enterprise Cape Breton Corporation (ECBC)

- ▶ Revised ECBC's performance management framework and developed the Corporation's Management, Resources and Results Structure (MRRS). The study involved a document review, a series of consultations, nine workshops, a best practice review, a report outlining ECBC's performance management framework and MRRS and presentations to a steering committee. As team leader, was directly involved in all aspects of the study. (2008)

Environment Canada (EC)

- ▶ Managed a study to develop an integrated RMAF and RBAF for the Migratory Bird Conservation Program. The project included: document review, consultations, a workshop and regular meeting with an advisory committee. (2008)
- ▶ Developed a Results-based Management and Accountability Framework for the Environmental Indicators initiative. These measures evaluated the short and long-term results and provided adequate detail for assessment and review and provided enough information on performance for each project to provide each indicator manager with an integrated performance story. The completed framework served as a key management tool in advancing the Environmental Indicators initiative. (2004)
- ▶ Developed a Results-based Management and Accountability Framework (RMAF) and a Risk Based Audit Framework (RBAF) for the National Agri-Environmental Standards Initiative (NAESI) Program. (2004)
- ▶ Assisted in revising a Results-based Management and Accountability Framework (RMAF) with a section on risk management for the Nature Business Line's Priority Ecosystems. The RMAF, prepared by another organization, needed to be revised because managers did not "see

themselves” in the logic model and therefore did not buy-into the RMAF. The revised version was approved by all managers involved in the business line. (2004)

- ▶ Managed a project to assist EC in revising a Results-based Management and Accountability Framework (RMAF) and a Risk Based Audit Framework (RBAF) for the EcoAction Community Funding Program. The project involved document review, revision of the existing RMAF and RBAF, facilitating a workshop with regional representatives and updating the documents based on regional input. (2003)
- ▶ Co-managed a project to help develop a performance measurement menu for the department’s outreach activities. The project involved a series of seven (7) focus groups in the regions and at headquarters to help gauge the status of outreach activities and measurement. In addition, co-facilitated a one-day workshop with 60 departmental representatives involved in outreach. (2003)
- ▶ Co-managed a project to develop a RMAF for the department’s Weather and Environmental Predictions (WEP) business line. The study involved document reviews, consultations as well as a two-day workshop. (2002-2003)
- ▶ Developed a Results-based Management and Accountability Framework for the EcoAction community funding program. The project involved document review to develop the initial measures and logic model. Six interviews were conducted with regional managers and several meetings were held with headquarters staff to obtain their input on continuing developments. Final adjustments were made to the document based on a final workshop with managers from the regions as well as representatives from the national headquarters. (2002)
- ▶ Developed a Results-based Management and Accountability Framework (RMAF) for the ENRFA Cluster. The project was a multi-departmental initiative involving the five Natural Resources departments. The key activities involved in this project were development of workshop material, development of draft logic model and performance measurement strategy, conducting interviews with key departmental representatives and reporting. (2001-2002)
- ▶ Assisted the Emergency Prevention and Preparedness group with the development of performance measures. The workshop defined key results areas, associated performance indicators, and information sources. Organized the workshop and drafted the performance frameworks and blueprints. (1997)

Fisheries and Oceans (DFO)

- ▶ Completed a management review of two Centres of Expertise (COE): the Centre for Offshore Oil & Gas Environmental Research (COOGER) and the National Centre for Arctic Aquatic Research Excellence (N-CAARE). The management review was intended to provide guidance towards improving the management and operation of all COEs and towards the establishment of additional COEs. The study involved a document review, data analysis and interviews. The final report identified best practices, opportunities for improvement, impediments and barriers to program delivery, extent of collaborations and COE effectiveness. As team leader was responsible for all aspects of this study. (2008)
- ▶ Managed a study to develop a plan for the review of the provision of scientific peer reviewed advice for decision making. The study involved the development of a methodological approach to be used for the review, including in-depth interview guides for deliverers and recipients of advice. (2007)
- ▶ Managed a study to develop an evaluation framework for the Federal Science and Technology Community Management Secretariat housed at DFO. The study involved a document review, in-depth interviews and a facilitated workshop. The evaluation framework identified the issues, methodologies, timing and budget for an evaluation of the Secretariat. The study also involved a

requirement to prepare the Terms of Reference for the upcoming evaluation of the Secretariat. (2007)

- ▶ Development of a Results-based Management and Accountability Framework (RMAF) for Program Integrity 1 Initiatives. The project involved developing an integrated RMAF for all Program Integrity initiatives, as well as separate RMAFs for the five individual components. The project involved both a detailed planning phase and an implementation phase. The planning phase involved document review and interviews with key staff to develop profiles and logic models for each component and a work plan for completion of the study. The implementation phase included additional document review, interviews and workshops with DFO managers and staff to develop performance frameworks and identify performance measures and indicators for each of the components, as well as potential evaluation issues and methodologies for future evaluations. Integrated and component level RMAFs were provided. (2001)
- ▶ Managed development of study involving the Accountability and Evaluation Framework for the Program for Sustainable Aquaculture. The project involved document review, and over 20 interviews with program managers and staff, as well as several workshops with national and regional managers and program delivery personnel to develop and validate the performance measures and indicators. Support was also provided for the development of an appropriate governance structure. Close contact was maintained with the interdepartmental program steering committee, and program office personnel. Separate performance frameworks and measures were developed for each of the four sub-components, as well as an integrated framework and measures at the program level. Evaluation issues and methodological approaches were also identified for a future evaluation. (2001-2002)
- ▶ Evaluation studies were conducted of DFO programs to reduce pressures on Pacific salmon stocks and Atlantic groundfish stocks by retiring fishing licences through a buyout program. The study examined 15 issues related to program design and delivery, alternatives, objectives achievement and the social and economic impacts of the program on individuals and local communities involved in these fisheries. The study included document review, in-depth interviews with program staff and stakeholders, and a telephone survey of representative samples of three groups; those who had applied for licence retirement but not been accepted, those who had applied and been accepted and those who had not applied. (2000-2001)
- ▶ Assisted DFO Canada to develop a detailed work plan outlining proposed approaches to develop and implement a performance measurement framework and service standards for the Small Craft Harbours Program. (1999-2000)
- ▶ Conducted eleven two-day workshops (Newfoundland, Central, Laurentian, Maritimes, Pacific, and six at headquarters) to prepare a blueprint for the Marine Technical and Support Services (MTSS). Each workshop defined key results areas, associated performance indicators, and information sources. Also, a consolidation of workshop blueprints and aggregate MTSS analysis was performed in this project. Specific implementation requirements, draft measurement tools (e.g., surveys) and an action plan for implementation was also completed. (1996-1997)

Foreign Affairs and International Trade

- ▶ Developed an evaluation framework for the Canadian Passport Renewal Project, Phase 3A Pilot. The purpose of the evaluation framework was to provide management with the information it needed to ensure that the appropriate ongoing measurement systems were in place to support an evaluation of the pilot in a timely and cost-effective fashion. The development of the evaluation framework involved a document review, in-depth interviews and a facilitated workshop. (2007)
- ▶ We assisted the Program Services Branch of the International Securities Branch to develop a results-based management approach for Branch core programs, required in response to a Departmental commitment to improved accountability and performance based reporting. The

project included document review, interviews and presentations to senior management. The deliverable was a report outlining a plan for the introduction and implement of a Results Based Management strategy within the Branch. (2006)

- ▶ A survey was developed and conducted for the Department of Foreign Affairs and International Trade (DFAIT) for its Anti-Drug Information Program. A questionnaire was developed and 100 interviews were conducted in two Montreal apartment buildings, 50 in each of the two buildings. An analytical report was completed. (1996)

Forest Products Association of Canada

- ▶ Managed an evaluation of the European operations of FPAC. The evaluation involved a review of FPAC documents (including bi-monthly and other reports from the European Bureau, and the 1997 evaluation report) and interviews with 31 individuals selected to represent a wide range of stakeholders (including forest industry officials in Canada, forest industry representatives in Europe, NRCan and other Canadian government officials in Canada, Canadian government trade officials in Europe, European Trade Associations and FPAC managers). (2004-2005)

Health Canada (HC)

- ▶ Completed a situation analysis of the Health Directorate of the Health Promotion and Program Branch as it relates to performance management. The analysis was to determine what performance management really meant to managers and directors, and to determine what processes and practices were in place. (2000)
- ▶ Completed a study to identify gaps, overlaps and inconsistencies in the existing accountability and planning activities within the Medical Services Branch (MSB). A total of 30 interviews were conducted with Health Canada representatives who were deemed to be able to provide information on accountability and / or planning for MSB. The final report included a description of the methodology followed, detailed findings, a description of what additional work needed to be completed, and a detailed methodology for this additional work. (1997-1998)

House of Commons

- ▶ Conducted a review of the Public Information Office which included the examination of the extent to which goals and objectives have been realized over the full range of services provided. The review also examined the efficiency with which these services are provided and alternative means for their provision; the quality of management information used in decision-making; and, the manner in which assets such as broadcasting equipment are managed over their useful lives. The study involved interviews with program staff, with other House of Commons staff, and with Members of Parliament; an intercept survey with visitors to the Hill; and mail surveys with three distinct client groups. (1994)

Human Resources Development Canada (HRDC)

- ▶ Assisted the International Academic Mobility (IAM) initiative to further develop its performance measurement strategy. As per the results-based accountability framework, the project involved the development and pretesting of an annual reporting format to be submitted by educational institutions participating in the initiative. The project also involved designing and pretesting three survey instruments. (2001)
- ▶ Developed a Results-based Management and Accountability Framework (RMAF) for the IAM that includes performance measurement indicators and options for on-going data collection. The RMAF ensured that the IAM initiative can be monitored in a cost-effective and timely manner and all Treasury Board requirements were being met. (2000)

- ▶ Assisted the Income Security Program (ISP) and Employment Insurance (EI) to identify key results, performance measures, information sources, and gaps. The study involved two workshops, one with regional and headquarters ISP staff and the other with regional and headquarters EI staff, follow-up interviews, and report writing. (1999)
- ▶ Designed a questionnaire for a survey of unemployment insurance clients for the Department of Human Resources Development Canada to help improve the quality of service at Canada Employment Centres. The survey was part of a national audit of the Canada Employment Centres. Also provided expert advice regarding sampling as well as analysis and reporting. (1994-1995)
- ▶ Developed a performance framework and performance indicators for the Employer Registration Division. This included a two-day workshop which established key results for the Division through the review of the draft performance framework; determined potential data sources to be used to measure the achievement of the key results; and, developed appropriate performance indicators. (1994)

Indian and Northern Affairs Canada

- ▶ Developed a logic model and performance measurement strategy for the International Polar Year. The study involved a workshop with representatives from the various departments involved in the initiative as well as a series of follow-up interviews. (2006)
- ▶ Developed a Results-based Management and Accountability Framework for Phase two of the Marshall Strategy. The strategy was a multi-departmental initiative involving INAC, DFO, Parks Canada, and Environment Canada. The project involved a one day workshop to develop a consensus logic model. The project also involved interviews with key program proponents in defining indicators and key evaluation issues. (2002)
- ▶ Developed a Results-based Management and Accountability Framework for the Labrador Innu Comprehensive Healing Strategy. The strategy was a multi-departmental initiative spearheaded by INAC and involved Health Canada, and the Solicitor General. The project involved document review, the development and facilitation of a two-day workshop and the conduct of telephone interviews to assist in development of a logic model, performance measures, evaluation issues, and a data collection plan based on current data collection and reporting systems. (2001)
- ▶ Prepared and delivered a workshop for the Litigation Management and Resolution Branch (LMRB). The workshop provided participants with a basic understanding of performance management concepts, logic models, performance measures and results-based management and accountability frameworks. A key element of the workshop was the development of a departmental logic model based on the input of participants. (2001)

Indian Claims Commission (ICC)

- ▶ Completed a review of the annual reports and other data available on the Commission's activities, outputs and outcomes. The purpose of the study was to develop a quantitative and qualitative database for future use by the ICC. The information also served to report on the performance of the ICC in a fifteenth anniversary report. (2006)

Industry Canada

- ▶ Facilitated a one-day workshop to help FedNor develop a logic model and performance measurement strategy for its Trade Strategy. (2009)
- ▶ Prepared an integrated RMAF-RBAF for the Bombardier CSeries projects. The study involved a review of documents, a workshop to develop the AIF logic model, performance measures and risk

strategy, additional consultations and the preparation of the RMAF-RBAF in accordance with Treasury Board guidelines. (2008 – ongoing)

- ▶ Completed a review of FedNor's Export Development Initiative (EDI). The purpose of the review was to assist FedNor in assessing the value of its investment to determine whether the initiative should continue. The study involved a document review, data analysis, 50 in-depth interviews, a telephone survey of 200 EDI clients and a benchmark to compare the two host organizations delivering the program. (2008 – ongoing)
- ▶ Provided assistance in the development of a logic model and performance indicators in anticipation of a Results-based Management and Accountability Framework (RMAF) for the Student Connections program. The work included the development of a project proposal template for small and medium-sized enterprises (SMEs) and pre and post evaluation questionnaires for SMEs and youth. In addition, a pilot test was administered, and the results of the pilot test were analyzed and presented in a PowerPoint presentation deck. (2008 – ongoing)
- ▶ Managed a study to develop an integrated Results-based Management and Accountability Framework and Risk Based Audit Framework (RMAF-RBAF) for the Automotive Innovation Fund. The study involved a review of documents, the facilitation of a ½ day workshop and follow-up consultations. (2008)
- ▶ Completed a study which involved updating four case studies of projects funded under Technology Partnerships Canada (TPC). The study was completed to provide information on longer term impacts as well as to provide management of the Strategic Aerospace and Defence Initiative (SADI) with a tool for ongoing performance measurement. The study involved an intensive review of project files, interviews with program managers, project recipients and other stakeholders. (2008)
- ▶ Prepared a combined RMAF and RBAF for the Structured Financing Facility (SFF) to reflect a change in the program, in follow-up to a renewed Treasury Board Submission. The study involved an in-depth document review, workshop and follow-up consultations. (2007)
- ▶ Completed a study to provide IC with a report on the results of its activities related to EDOLMCs. The study involved a review of relevant documents, interviews with representatives of IC, regional development agencies and clients of some of the EDOLMC programs of IC. The report was used to help meet the reporting requirements of IC to the Department of Canadian Heritage in the context of Section 41 of the Official Languages Act. (2007)
- ▶ Provided coaching on performance measurement for FedNor's Northern Ontario Development Program (NODP formerly NODF). Provided an initial 2-day coaching session to the FedNor project lead, followed by ongoing advice on outcomes, performance indicators and measurement methodologies including reviewing the products for each priority. Developed a Final Project Report form to systematically collect information on project results and a revised logic model for the program. (2006)
- ▶ Managed a summative evaluation of the Northern Ontario Development Fund (NODF) which will assess the achievements and identify lessons learned from the program. The evaluation methodologies include: database analysis, document and literature review, 71 key informant interviews, 200 telephone survey of recipients, and 9 case studies. The summative evaluation follows a formative evaluation of the program (also managed by Suzanne) which confirmed that the program design and delivery methods would allow FedNor to achieve the goals of the NODF. (2005-2006)
- ▶ Performed a series of tables for the Canada-Ontario Business Service Centre using the Ontario client satisfaction survey data for the 2005 CBSC Client Feedback survey. The tables included: stage of business life cycle by gender, size of business by gender, highest level of schooling by

gender, as well as other tables from the report. Prepared a brief interpretive paragraph for each of the tables prepared, highlighting the gender differences. (2005)

- ▶ Managed a formative evaluation of the Eastern Ontario Development Fund (EODF) which assessed the design, delivery and implementation of the program. The evaluation results are to provide evidence critical to FedNor program planning and design in light of the March 31, 2006 sunset for the program. Research questions addressed issues of design and delivery, relevance, success, monitoring and accountability, alternatives and cost-effectiveness, and lessons learned. The evaluation methodologies included: document review, database analysis, 28 key informant interviews (including FedNor management and staff, CFDCs and other stakeholders), survey of 250 recipients as well as five case studies. (2005)
- ▶ Developed an integrated RMAF and RBAF for the Program for Strategic Industrial Projects (SIPP). The project included: document review, document preparation and consultations. The intent of this integrated RMAF / RBAF was to provide a framework within which to evaluate the projects funded under this program as well as a framework to manage the risks associated with the program and the projects. (2005)
- ▶ Provided a report to the Canada-Ontario Business Services Centre (COBSC) on its ongoing performance measurement strategy based on a survey of COBSC clients. A benchmarking analysis comparing findings from the COBSC Client Feedback Survey, March 2004, was included in this report. The report provided detailed findings for ongoing management purposes, including detailed survey tables. (2005)
- ▶ Conducted an evaluation of the Canadian Biotechnology Secretariat (CBS) Fund, CBAC (advisory committee) and CBSec (secretariat). The evaluation examined issues related to the relevance of the CBS program and its components, its design and delivery, continuous improvement, its performance measurement systems and its success. The evaluation methodologies included a document review, analysis of data and 36 in-depth interviews with program staff, board members, and departmental representatives. (2005)
- ▶ Revised the report that scoped an upcoming evaluation of the CBS to ensure that issues were still relevant to management and that the methodologies were still appropriate given recent developments. (2005)
- ▶ Completed a survey of FedNor clients in the context of the FedNor Service Improvement Initiative. The project included: sampling, questionnaire design, data collection (151 clients) and capture, data analysis and reporting. The report compared the results of the 2005 survey to a survey also completed by PMN in 2002. (2005)
- ▶ Prepared a report that scoped an upcoming evaluation of the CBS by updating the existing RMAF to take into account issues of concern to management and stakeholders as well as to ensure that the evaluation did not duplicate the efforts of several other studies undertaken in the Federal biotechnology community (including the Treasury Board Expenditure Management Review of the Biotechnology Strategy). The report was prepared based on a document review, a database review and interviews with CBSec representatives, TBS, and biotechnology departments and agencies. (2004)
- ▶ Managed a study involving the development of a Results-based Management and Accountability Framework (RMAF), and a Risk Based Audit Framework (RBAF) for a PRECARN planned program renewal. The RMAF identified both performance measurement and reporting requirements and the RBAF identified risk management and audit issues that program management needed to take into consideration. (2004-2005)
- ▶ Conducted a study to provide a progress report to Technology Partnerships Canada (TPC) management on the program's outcomes based on the recently agreed upon core benefits and

indicators. The study involved the design of a form to capture key program results, file reviews and confirmation of the results with the clients. The final report summarized the extent to which the program's key results were being achieved. (2004)

- ▶ Conducted a survey of clients for the Canada Business Services Centres from four provinces: Ontario, Quebec, Manitoba and Saskatchewan. In total, 558 surveys were completed – 246 with clients who had accessed the services by telephone, 182 in-person, 2 by email and 128 via the internet; 109 with clients from Québec, 298 from Ontario, 77 from Manitoba and 74 from Saskatchewan. (2004)
- ▶ Conducted an evaluation of the Innovation and Knowledge-Based Economy (KBE) Initiative in Northern and Southern Ontario. The evaluation study focused on both the Northern portion of the initiative delivered by FedNor and the Southern portion delivered by Community Futures Development Corporations (CFDCs) in Southern Ontario. The evaluation examined issues related to relevance, design and delivery, success, monitoring and accountability, and alternatives, cost-effectiveness and lessons learned. The evaluation study involved a review of program documents, an analysis of program data, interviews with 44 key informants, a survey of 169 project recipients, and five case studies carried out on completed projects. (2004)
- ▶ Conducted a series of mini case studies to provide information to Technology Partnerships Canada (TPC) management on the applicability of the program's core benefits, outcomes, and performance indicators. (2004)
- ▶ Completed a survey of COBSC clients as part of this organization's ongoing performance measurement requirements. The survey involved four types of clients (call centre clients, email clients, internet clients and in-person clients via Regional Access Centres) and four different survey methodologies were offered to clients regardless of service used (clients could complete by telephone, mail, fax or internet). (2003-2004)
- ▶ Completed a study to pilot test a proposed questionnaire to measure the needs and satisfaction of client of the Canada-Ontario Business Service Centre (COBSC). The study involved refining a questionnaire to meet management requirements as well as the revised requirements of the Common Measurements Tool (CMT). The questionnaire was then tailored to four types of services (call centre clients, email services, internet services, and in-person via Regional Access Sites) and four response options (telephone, fax, mail, or internet). The final report provided conclusions and recommendations regarding ongoing survey methodologies. (2003)
- ▶ Managed a study involving the preparation of a summary "roll-up" report of the four regional evaluations completed of the Community Futures Program – this included Atlantic Canada Opportunities Agency (ACOA), Community Economic Development (CED) for Quebec Regions, FedNor, and Western Economic Diversification (WD). (2003)
- ▶ Managed an evaluation of the Community Futures program in Ontario. The evaluation involved more than 100 in-depth interviews with various audiences (management, staff, co-deliverers and stakeholders), a survey of 417 clients, 5 case studies, database analyses and document reviews. The final report was presented to the evaluation steering committee as well as to FedNor Management Committee (FMC). (2002-2003)
- ▶ Developed a performance measurement guide for the Smart Communities Program. The guide was to be provided to program recipients to help them implement appropriate performance measurement strategies in the context of their projects. (2002)
- ▶ Managed an evaluation of the Canada-Ontario Business Service Centre (COBSC). The evaluation provided management with objective information to plan the development and continuation of the program. The evaluation examined issues related to the relevance, success, and cost-effectiveness of the program. The study involved document reviews, 44 in-depth

interviews with COBSC staff, managers and partners, a benchmarking study comparing the COBSC to other federal and provincial call centres, 20 site visits to regional access centres and a telephone survey of over 500 clients and 280 non-clients. The report included the findings from all sources and recommendations for improvement. The findings of the evaluation were presented to the staff and managers. (2002)

- ▶ Managed a large evaluation of the Federal Economic Development Initiative for Northern Ontario (FedNor). The project involved the review of documents; analysis of internal databases; telephone survey of 164 clients; two focus groups with stakeholders; 10 interviews with experts; 24 interviews with co-deliverers; 20 interviews with management and staff; five case studies; and a benchmark study comparing FedNor to other economic development agencies. The evaluation examined issues related to the relevance, success, and cost-effectiveness of the program. The findings were presented in a comprehensive report and presentation to the evaluation steering committee. (2001-2002)
- ▶ Managed a study to develop baseline statistics for FedNor. The study was to support the program's Service Improvement Initiative. The study involved the presentation of detailed statistics based on a self completed surveys of 100 clients and 29 staff. (2001-2002)
- ▶ Designed an ongoing client survey strategy for the COBSC. The study involved developing an approach suitable to the wide range of services of the COBSC and designing the appropriate survey instruments. (2001)
- ▶ Revised the Federal Economic Development Initiative in Northern Ontario (FedNor) evaluation framework initially prepared in 1997. The revision of the evaluation framework took into account changes to FedNor's program framework, recent FedNor audit report, FedNor's management and accountability framework and Treasury Board policies and guidelines. The revisions to the evaluation framework included a new profile, revised issues, and an evaluation strategy incorporating methodologies, options and recommendations. The changes were based on document review and consultations with FedNor representatives. (2001)
- ▶ Was contracted on two separate occasions to help the Trade Team Canada Sector (TTCS) further develop its performance measurement strategy via client surveys. (2000)
- ▶ Developed a performance measurement tool to assess client satisfaction with the outreach activities in which International Trade Centres (ITCs) play a significant role. These outreach activities include seminars and workshops.(2000)
- ▶ Conducted an evaluation study of the implementation of Section 41 of the *Official Languages Act*. The evaluation study involved the review of relevant documentation, analysis of 18 key programs and services, 39 interviews with regional coordinators, Operations staff, community representatives, representatives from other departments and senior government officials, a focus group with regional coordinators, a telephone survey with 102 IC managers, and a telephone survey with 74 community representatives. (2000)
- ▶ Conducted an evaluation of the Canada-Ontario Business Service Centre (COBSC) Regional Access Program (RAP). The evaluation provided management with objective information to plan the development and continuation of the program. The evaluation examined issues related to the relevance, success, and cost-effectiveness of the program. The study involved document reviews, in-depth interviews, and a telephone survey of over 2,400 clients and non-clients. The report included the findings from all sources and recommendations for improvement. (1999-2000)
- ▶ Conducted an evaluation of the Standards Initiatives Program (SIP). The evaluation examined issues related to objectives achievement, impacts and effects, and design and delivery. The study involved document reviews, in-depth telephone interviews, telephone survey of 268 people affected by a sample of SIP projects, and 14 case studies. (1999-2000)

- ▶ Developed an evaluation framework for the Smart Communities Program. The evaluation framework was developed by first conducting a document review. Two workshops were then held to develop a performance framework, key performance measures, and information services. In-depth interviews were conducted to finalize the products of the workshops, and identify additional systems and procedures required to collect the necessary performance information. The report identified all information gathered as well as costed options for a future evaluation of the program. (1999)
- ▶ Assisted the Industry Sector to develop an evaluation framework for its Human Resource Action Plan. The study developed various options for the Industry Sector to assess on-going progress in the implementation of its HR Action Plan and measure performance / results. The study involved document reviews, five workshops, and report writing. (1999-2000)
- ▶ Conducted a study to identify the needs of Francophone businesses in Southern Ontario, and identify gaps in Industry Canada services the Francophone business community. This study involved eight focus groups across Southern Ontario. The report discussed awareness and use of Industry Canada and other services, quality of services in French, gaps, and suggestions for improvements. (1999)
- ▶ Conducted a survey of partners of the Regional Trade Network (RTN) in the Prairies and developed and tested questionnaire(s) and methodologies to measure partner satisfaction with various aspects of the RTN. A report was written, describing the survey results and implications for a national survey. (1999)
- ▶ Conducted a pre-test of survey instruments for on-going measurement of Community Futures Development Corporations (CFDCs) for the Community Futures Program (CF). (1998-1999)
- ▶ Developed an evaluation framework for the Community Access Program (CAP). This study identified a performance measurement strategy for the Program as well as key evaluation issues to be considered for future evaluations. This study involved document reviews, a workshop, and expert consultations. A pre-test of survey instruments was conducted with three CAP sites to determine the level of client satisfaction with, and usefulness of, the training courses provided. (1998)
- ▶ Conducted an evaluation of the Canada-Ontario Business Service Centre (COBSC). The evaluation examined issues related to objectives achievement, impacts and effects, and alternatives. The study involved interviews, analysis and reporting. (1998)
- ▶ Conducted a benchmarking study for the Canada-Ontario Business Call Centre (COBCC). This study involved a survey of various call centres across Ontario. The survey dealt with issues such as service standards, means of communication and equipment, and identified best practices. (1998)
- ▶ Assisted the Community Futures Program develop an evaluation framework. The framework was developed by first conducting a document review and interviews. A workshop was then held to develop a performance framework, key measures and indicators, and a 'blueprint' for performance planning and reporting. A gap analysis was conducted through in-depth interviews, by assessing existing information systems' capabilities to provide performance measures, and by identifying additional systems and procedures which were required. The report identified all information gathered along with costed options for a future evaluation of the program. (1998)
- ▶ Assisted the Standards Initiative Program (SIP) of Industry Canada develop performance measurement and reporting methodologies. For each project within SIP, a performance framework, which describes inputs, activities, outputs, reach, short-term outcomes and longer-term results, was developed. Performance indicators, information sources, and gaps were also

identified for each project. This involved in-depth interviews with representatives of the organizations undertaking the projects. (1998-1999)

- ▶ Conducted performance-based management workshops for the Standards Initiative Program, Information Technology Industry Branch and the Competition Bureau. The workshops helped participants develop a consensus team vision for success; a basis for performance planning; specific measures covering the spectrum from inputs through outputs, users / clients, short and longer-term outcomes; and, draft performance reporting blueprints showing the key performance areas, measures, and sources of information. (1997-1998)
- ▶ Completed a survey of clients of the International Trade Centres (ITCs) across Canada. A total of 436 interviews were completed. A report for each region as well as a national report was then prepared and presented. (1996-1997)
- ▶ Undertook a study which led to the development of service standards for the Québec International Trade Centres (ITC). This included preparing a performance framework, conducting a client survey, performing interviews with staff to assess potential levels of service and, development of actual standards and an on-going monitoring instrument and methodology to ensure that the standards are met. (1996)
- ▶ Undertook the design phase for the surveys of actual clients and potential clients of the Canada-Ontario Business Service Centre (COBSC). The survey of actual clients was used to obtain statistically valid and reliable information on current COBSC client information needs, usage, perceived value, and benefits, while the survey of potential clients obtained the information needs, preferred medium, and perceptions of potential clients across the five major postal code regions of Ontario. The design phase included methodology, sample, and instrument design. (1995)
- ▶ Industry Canada senior management had requested a combined audit / evaluation be undertaken of the IC / NQI agreement. This audit / evaluation covered the compliance of the contribution agreement; determined NQI's performance and achievements; examined the allocation of resources; and, assessed the completeness and accuracy of costs claimed. Opportunities to streamline and improve the program delivery were also explored. (1995)
- ▶ Conducted an evaluation of the Canada Scholarships Program (CSP) to provide program management with direct input in its preparation of a Cabinet document. The study included the conduct of four large scale surveys and involved close to 1,500 telephone and on-site interviews. (1994)
- ▶ Assisted the Aboriginal Economic Program of Industry Canada to undertake a survey of 1,000 clients of the Aboriginal Business Development Programs. The purpose of the survey was to assess client satisfaction with various program attributes, determine the short-term impacts / results of the program on recipients, and identify areas of improvement to the program. (1994)
- ▶ Assisted the Aboriginal Economic Program (AEP) of Industry Canada to undertake the design phase for a survey of successful and unsuccessful applicants for program assistance. (1994)
- ▶ Assisted in the implementation of the Performance-Based Management System (PBMS) in selected centres. The implementation of the PBMS enabled the Technology Outreach Program (TOP) management to assess the performance of individual centres receiving IC funding on an on-going basis against relevant program criteria and stated centre objectives and allowed officers of the TOP program to report within government on an going basis on the effectiveness of the program as a whole. The study involved a survey of 2,300 clients of the centres to assess satisfaction with and impacts of the services of the centres. (1994)

- ▶ As the team member, participated in the evaluation of the Materials Assessment Project. The study involved a review of all documentation. A qualitative assessment of all existing evidence of cost-effectiveness of MAP was delivered. In total, more than 100 users and non-users of the program were interviewed. (1993)
- ▶ As team leader, conducted the evaluation study of the Science Culture Canada (SCC) program. This study involved examining key specific issues included in the broad evaluation issues of rationale, objectives achievement, impacts and effects, and alternative programs to and ways of delivering SCC. This study involved a series of surveys with program clients, co-delivery agents and rejected program applicants to assist in determining the impacts of and satisfaction with the programs. (1992-1993)
- ▶ Assisted in the on-going financial performance and operational monitoring of the Composite Materials Centre (CMC) of St-Jérôme. For this technology outreach centre funded in part by the Technology Outreach Program, an official plan was developed with the CMC to establish the framework for monitoring activities. The objective of the monitoring exercise was to verify that the technology centre was meeting departmental and program requirements as set out in its letter of offer, and to provide regular reports and advice to the ISTC-TOP representatives. (1992-1993)
- ▶ As a team member, conducted the evaluation of the TOP-AIM program. This study examined the effectiveness of TOP-AIM in developing networks. It involved a survey of clients to assess satisfaction with the program and its impacts. (1992-1993)
- ▶ Conducted a series of seven focus groups across Canada with senior representatives of small and medium sized firms from the manufacturing and service sectors. The purpose of the groups was to assess the competitive importance of quality in these organizations to learn what businesses are doing in the area of total quality management, and to determine which government services are needed in this area. (1992)
- ▶ Conducted an impact assessment study of the Canadian Industrial Innovation Centre / Waterloo (Innovation Centre). The study included a satisfaction survey with 500 clients of the Centre. (1991-1992)
- ▶ Conducted a series of focus groups across Canada with representatives of Canadian businesses. The purpose of the groups was to gather information to assist in the preparation of a marketing strategy for the department. A concept for an approach to servicing clients was also tested. Groups were conducted in English and French. (1991)
- ▶ As the team leader, participated in a study for the Environmental Affairs Branch involving in-depth interviews with potential clients of the St-Lawrence Environmental Technologies Development Program. The study was designed to help program management determine which firms it should target. Interviews were conducted in English and French. A major role was played in the overall study design, interviewing, report writing and presentation of the results. (1991)
- ▶ Managed a study involving a survey of 500 Canadian businesses to help assess their needs for market intelligence. Past usage of various information sources was measured as well as the level of interest in various types of market information. Focus groups were also conducted in three major Canadian cities to help understand some of the survey results by probing more deeply into certain issues. (1989-1990)
- ▶ Extensively involved in an evaluation of the Industrial and Regional Development Program (IRDP). Responsibilities included sampling, questionnaire design, conducting interviews with program officers, program managers and rejected applicants, undertaking case studies, and analysing and reporting on the results of the evaluation, based on several data sources. These sources included: file reviews, literature reviews, case studies, interviews with program officers

and managers, quantitative surveys with recipients of program assistance, rejected applicants, and a comparison group. (1989-1990)

Infrastructure Canada

- ▶ Completed a summative evaluation of the Infrastructure Canada Program (ICP). The evaluation helped determine the extent to which the program had been implemented as planned and assess the full range of results from outputs through immediate and intermediate outcomes and, where possible, the ultimate outcomes as identified in the program's logic model. The study involved a document and literature review, data analysis, cost-effectiveness analysis, 100 key informant interviews, 10 case studies and a survey of 1,000 municipalities. (2009 – ongoing)

International Trade Canada

- ▶ Developed a Performance Management Implementation Plan including a logic model with target outcomes and performance indicators for the International Business Opportunities Centre (IBOC). The project included the design and delivery of a one day workshop, the development of a performance measurement plan, the design, administration and analysis of a time reporting exercise, the development of data collection tools and the development of a results-based reporting plan. (2005)

Justice Canada

- ▶ Managed a formative evaluation of the Aboriginal Courtwork Program. Multiple lines of evidence were used to address issues related to implementation and delivery, data collection, and success. The methods for this project included a document review, 31 in-depth interviews and a survey of 130 courtworkers. (2006-2007)
- ▶ Revised the RMAF for the Department's Public Safety and Anti-Terrorism initiative to ensure that it reflected the needs of managers and pictured the initiative as it was being delivered. This involved a document review, a series of workshops with managers to develop the logic model and performance measures for the initiative, and follow-up interviews with departmental representatives. (2006)
- ▶ Completed an evaluation framework for the Access to Justice in Both Official Languages Support Initiative through a review of documents, data and consultations. (2006)
- ▶ Developed a Child-centred Family Justice Fund (CCFJF) Performance Measurement and Reporting Handbook for use by P/T recipients. The guide included performance measurement tools, such as survey questions, reporting templates, etc. (2005)
- ▶ Conducted an assessment of the needs of P/T stakeholders regarding implementation of the performance measurement and reporting requirements for the Child-centred Family Justice Fund (CCFJF). The purpose of the study was to determine the feasibility of developing a performance measurement guide for use by P/Ts. The project included: document review, needs assessment interviews, and a final report. (2004-2005)
- ▶ Assisted Justice Canada's Aboriginal Courtwork Program (ACW) with further development and implementation of a performance measurement and reporting strategy for use by P/T funding recipients and service delivery agencies to measure and report on the ongoing performance of their P/T ACW Program. The study included the development of a performance measurement guide, which provided strategies for the development and implementation of performance measurement and reporting strategies. The guide included survey strategies and questionnaires, reporting templates and other useful tools for use by service delivery agencies. (2004-2005)

- ▶ Assisted the Official Languages Division in developing a logic model and performance measures for the implementation of Article 41 of the *Official Language Act* in the Department. The study involved a series of meeting with management as well as focus groups with representatives of minority official languages throughout Canada to validate the outcomes identified in the logic model. (2001)
- ▶ Assisted the Evaluation Division of the Department of Justice, in partnership with the Learning and Education Section, with the delivery of training to managers and their staff within the Department, on the development and implementation of performance measures. The project involved reviewing reference material to formulate a suitable training process, conducting meetings with the contract authority and a representative from the Learning and Education Section to discuss the proposed training process; and conducting 8 training session. (2000)
- ▶ Undertook a study which led to the finalization of service standards for the Contracts and Materiel Management Division (CMMD) at the Department of Justice Canada. The study involved consulting clients to review the current draft of the service standards for CMMD in terms of clarity, relevance, and acceptability; establishing "*benchmark*" information as to CMMD's current levels of services; determining the appropriate reporting tools as it relates to the information required to assess whether or not CMMD is meeting its levels of service; and, finalizing the service standards, reporting methodology, and reporting instruments. (1995-1996)
- ▶ Prepared service standards and an ongoing client satisfaction monitoring instrument for the Contracting Unit. This methodology involved two focus groups with departmental clients and a series of interviews with departmental clients in the regions as well as with suppliers who deal with the Contracting Unit. The first focus group served to help determine the service features which were important to clients and provide input into setting some of the standards. The second focus group and the interviews served to assess the draft service standards. (1995)
- ▶ In another study, focus tested the draft Standards for Service to the Public, prepared by the Communications and Consultation Branch of the Department of Justice Canada. (1993)

NAFTA Secretariat - Canadian Section

- ▶ Reviewed the current staff evaluation process at NAFTA Secretariat to be consistent with the performance measurement system of the Secretariat, and with the Universal Classification System (UCS). The review was completed in two stages. A detailed study methodology was developed. This included examining other private and public sector organizations to compare their performance assessment process, preparing a rationale for changing the current evaluation methodology and preparing a revised evaluation criteria form. The second stage was obtaining employee buy-in, through a workshop, for the new evaluation form. (1998)
- ▶ Over a three year period, analyzed and reported on the NAFTA Secretariat's performance based on the results of an on-going survey of clients. Reports compared current year performance to targets and to performance in previous years. The reports were used by the Secretariat in its preparation of yearly Departmental Performance Reports (DPR). (1996-1998)
- ▶ Was hired to prepare the service standards document for all services of the Secretariat. The results of the client satisfaction survey were used to help establish the most important service features. Staff was also consulted extensively to help establish standards which were challenging yet achievable. (1995)
- ▶ Based on the service standards developed in an earlier study, developed an ongoing client satisfaction survey instrument for the Secretariat. (1994)
- ▶ As a team leader, participated in the Study on Service Standards for the Binational Secretariat – Canadian Section (now NAFTA Secretariat). The objective of this study was to develop service

standards and service quality measures. It involved producing a performance framework through a half-day workshop, conducting a survey of clients and analyzing and reporting on the results. (1994)

National Archives of Canada (now Library and Archives Canada)

- ▶ Assisted and facilitated the work of National Archives management in re-engineering its Reference Services sub-activity. This assignment consisted of a strategic analysis of NA's Reference Services sub-activity and entailed a high-level, selective re-engineering review. The objective of this study was to help National Archives management achieve significant improvement in the delivery of services to the public and to recommend actions in the areas of appropriate levels of services; improved access; single window service; processes; user fees; and organization and accommodation. Various processes which were most amenable to significant re-engineering potential were identified, analyzed and practical recommendations were made on improved business processes, methods of service delivery and information systems to contribute to streamlining of the Reference Services sub-activity. (1994-1995)
- ▶ Managed a major evaluation of the control sub-activity of the National Archives of Canada. Responsibilities included overseeing all aspects of the study which involved multiple lines of evidence. Methodologies included: interviews with staff and with representatives of other archival institutions; a survey of researchers; systems analysis; document review; and, discussions with a panel of experts. (1991)
- ▶ Completed an evaluation assessment of the control sub-activity of the National Archives of Canada. Responsibilities for the assessment included: preparation of a logic model and component profile; development of issues, needs and indicators; evaluation options; and development of draft survey instruments. (1989-1990)

National Defence

- ▶ As team leader, participated in the Evaluation of the Defence Industry Research (DIR) Program. The purpose of the evaluation was to determine the program's reach, client satisfaction, and the impacts of the program. The study involved producing a performance framework for the DIR Program, file reviews, interviews and a final report. (2004)

National Library of Canada (now Library and Archives Canada)

- ▶ Managed an evaluation study of the "*Read Up On It*" Program, a program designed to encourage the reading of Canadian books by elementary school students. The study involved a mail survey of elementary school librarians and addressed issues related to program awareness, relevance, and impacts. (1991)

National Research Council

- ▶ Developed a case study whose main objective was to examine the impacts, both internal and external of the National Research Council Genomics and Health Initiative (NRC-GHI). The case study involved the GHI Biorenewable Oil project, based in Saskatoon. The case study focused on specific impacts derived from two broad categories: external (the social and economic impacts realized to date and potential future impacts) and internal (the impacts on the NRC institutes and related organizations in terms of collaborations, management practices, resource allocation, administration and research focus). The study included a review of documents and file as well as interviews with internal and external stakeholders. (2009)
- ▶ Six departments currently receive funding under the Genomics R&D Initiative: Agriculture and Agri-Food Canada, Environment Canada, Fisheries and Oceans Canada, Health Canada, National Research Council Canada, and Natural Resources Canada. PMN conducted an

interdepartmental, horizontal evaluation study of this Initiative. Managed the evaluation of this initiative which addressed issues related to the Initiative's relevance, early success, cost-effectiveness or alternatives and design and delivery. The methodologies used included a document review, 26 in-depth interviews with departmental managers, 61 in-depth interviews with researchers, 19 in-depth interviews with departmental stakeholders, and 9 in-depth interviews with "horizontal" stakeholders. Based on some of the evaluation findings and Treasury Board guidelines, also updated the Results-based Management and Accountability Framework (RMAF) for the Initiative. This involved a workshop, follow-up consultations and the preparation of the RMAF document. (2006-2007)

- ▶ Managed an evaluation of a pilot project which co-locates IRAP Industrial Technology Advisors (ITAs) in Business Development Bank of Canada (BDC) service centres. The primary objective of the evaluation was to estimate the impacts and benefits of the initiative on the IRAP network system at the regional level, and how it has influenced the delivery of its services to SMEs. Interviews were conducted with representatives of IRAP and the BDC in each of the three pilot cities, Vancouver, Toronto, and Montreal. Interviews were also conducted with IRAP representatives from New Brunswick and the Prairies where informal networks exist. The report outlined the methodology, presented findings as they related to the key issues, as well as presented recommendations for improvements. (1999)
- ▶ Co-managed an evaluation of the Institute for Research in Construction (IRC) which showed accountability and demonstrated the effective use of resources to achieve a reasonable level of performance, and allowed IRC to achieve greater effectiveness through program improvement. Methodologies used included a document review, client surveys, stakeholder interviews, case studies, and a benchmarking study. The report included the findings from all sources and recommendations for improvements. (1997-1998)
- ▶ Assisted the Canadian Technology Network (CTN) assess the effectiveness of its promotional activities. This study included describing the promotions activity carried out by regions and the national office as well as producing product inventory lists for each region. Recommendations were aimed at improving the internal administrative procedures supporting promotions activity; developing a communications plan for the fiscal year 1997-98; and, developing a plan of action to monitor the on-going performance of the proposed communications activities. (1997)
- ▶ Assisted the Canadian Technology Network (CTN) develop and pre-test collection instruments and methodology to obtain client feedback on an on-going basis from people who go directly to CTN affiliates for services. The completed surveys were analysed for differences in response rates; completeness of surveys; the quality of responses; and, responses per se. A report was prepared summarizing the results, recommending an approach for on-going monitoring; and, finalizing the questionnaire to be used as per the recommended methodology. (1996-1997)
- ▶ Conducted a telephone survey of 500 IRAP clients who completed a project involving IRAP funding over a two year period and of 100 clients who received advice without funding from an IRAP Industrial Technology Advisor (ITA). A presentation of the results was held and a report was prepared. (1996-1997)
- ▶ Assisted NRC in the development of the methodology, instrument and preparation for a survey of IRAP clients, in the context of an evaluation of the program. Included was: identifying issues for the survey; designing the survey methodology and questionnaire; a pre-test of the survey; and, preparation and mail out of letters to potential survey clients. (1996)
- ▶ Conducted a preliminary audit of the IRAP client database and files. This was achieved by identifying the fields in the IRAP project files relevant to an assessment of program performance; identifying additional fields necessary for performance measurement and which are not included in the IRAP project files; assessing the quality of information in the IRAP project file database;

and, developing a statistically reliable profile of IRAP funded projects in terms of type of firm, location, technology and funding level. (1996)

- ▶ Provided the services of a survey specialist to help one of NRC's branches assess the type of rewards and recognition program which would best address the needs of employees at all levels. (1994)
- ▶ Conducted an assessment of NRC's achievements for Corporate Planning and Evaluation in order to demonstrate the Council's key role in Canada's technology infrastructure. The study involved conducting interviews with key NRC officials and other organization contacts and providing an in-depth profile of 30 NRC successful projects. (1993)
- ▶ Participated in a major Strategic Assessment of Engineering at NRC. Responsibilities included the managing of a client survey from five engineering Institutes as well as the delivery of presentations to several management groups. (1992)
- ▶ Managed a review of the impact of the IRAP program on PEI. In-depth interviews were conducted in person or by telephone to measure the impact of the program on organizations depending on the type of project, the number of projects subsidized, and many other factors. (1991)
- ▶ Managed the survey component of a major evaluation of the IRAP program. Telephone and / or personal interviews were conducted using seven different survey instruments. A complex weighing scheme was put into effect to adjust for disproportionate sampling. A major file review was also undertaken. (1989-1990)
- ▶ As part of the evaluation assessment of the IRAP program, conducted interviews with regional representatives, to assist in the development of evaluation issues, their indicators and relevant information sources. (1989)

Natural Resources Canada

- ▶ Managed an evaluation of the Clean Electrical Power Generation (CEPG) Sub-sub Activity within the Energy Science and Technology Sub Activity of the Department's Program Activity Architecture (PAA). The purpose of the study was to evaluate the CEPG Sub-sub Activity, administered by Office of Research and Development (OERD). The evaluation examined the relevance, success and cost-effectiveness of the key elements of the CEPG in meeting its objectives. The main clients of the evaluation were NRCan senior management and Treasury Board Secretariat (TBS), who required evidence-based information on the performance of the program activities under CEPG to inform the decision about the renewal of the Clean Air Agenda. The study involved a document, project file and administrative data review, 50 interviews and 15 case studies.
- ▶ Completed a study to develop profiles for four departmental renewable energy initiatives: the Wind Power Production Incentive, Renewable Energy Deployment Initiative, ecoENERGY for Renewable Power Program and ecoENERGY for Renewable Heat Program. The profiles were developed through a document review and data analysis, supplemented with consultations with departmental representatives. The evaluation issues were identified through consultations with departmental representatives as well as with industry representatives. (2008)
- ▶ Co-managed a summative evaluation of the Value to Wood Program (VWP). The study examined issues related to the program's relevance, success and cost-effectiveness. The evaluation methodologies included a document and data review, 67 in-depth interviews with a wide range of individuals involved in the program, a telephone survey of 80 technology transfer clients, and five in-depth case studies. (2006-2007)

- ▶ Participated in an evaluation of the contribution in support of FERIC by the Canadian Forest Service of NRCan. Was responsible for the design, implementation, analysis and reporting of a telephone survey (of 100 members and others receiving advice and assistance, and in some cases participating in research projects, randomly selected from lists provided by FERIC). (2004)
- ▶ Participated in an evaluation of the contribution by the Canadian Forest Service of NRCan in support of Forintek Canada Corporation. Was responsible for the design, implementation, analysis and reporting of telephone surveys (of 40 research partners and 130 members receiving advice and assistance, randomly selected from lists provided by Forintek). (2004)
- ▶ Assisted the Canadian Forest Service (CFS) design and implement a method to measure customer satisfaction. Designed a customer satisfaction measurement framework, based on information available, CFS needs and priorities, and its performance indicators and impact assessment initiatives. Also designed survey methodologies and questionnaires. (1997-1998)
- ▶ Participated in an evaluation study of the MEND program to report on nine issues established by an evaluation plan approved by the MEND Board of Directors. Responsible for a telephone survey of workshop participants, including design, implementation, analysis and reporting. (1996)
- ▶ Participated in an evaluation of Natural Resources Canada's (formerly Canadian Forestry Services) contribution to Forintek. Was responsible for a client survey of Forintek members and non-members, including design, implementation, analysis and reporting. (1994)
- ▶ Participated in a major evaluation of the Geological Survey of Canada (GSC). Was responsible for a client survey, including design, implementation, analysis and reporting. (1994)

Natural Sciences and Engineering Research Council of Canada

- ▶ Participated in an evaluation of the Strategic Projects Program (SPP) to provide Senior Management with objective information to determine and analyse the impacts of the Program and its niche in the current NSERC program structure. Methodologies used included a document review, telephone survey, in-person interviews, and case studies. Was responsible for a client survey, including design, implementation, analysis and reporting. (1998-1999)
- ▶ Participated in the evaluation of the University-Government Program (UGP). The purpose of the evaluation was to determine the program's reach, client satisfaction, and the impacts of the program. This study involved the development of a performance framework model, file reviews, questionnaire design, data collection and analysis, and report writing. (1993)

Office of the Auditor General (OAG)

- ▶ Developed an office-wide approach to conducting surveys of parliamentarians (clients) and auditees (stakeholders) that provided the OAG with information required for performance reporting and performance management. The project deliverables included the development of a survey tool and survey strategy for both parliamentarians and auditees. Interviews were conducted with 12 key OAG staff and two external sources to develop the survey methodology and determine the information requirements to be obtained from the surveys. (2001)
- ▶ Worked with the OAG team in conducting an audit of the Canadian Broadcasting Corporation (CBC). The key determination of this study was to assess whether current performance measurement systems and practices constituted a potentially significant risk to the ability of the CBC to deliver on its mandate. This determination provided the basis for the execution phase of the special investigation. (1999)

Office of the Information Commissioner of Canada (OIC)

- ▶ Managed a study to assist the Office of the Information Commissioner of Canada (OIC) in the review and streamlining of the complaints handling process which includes investigative and administrative processes. The study focussed on three components of the OIC's backlog strategy: review of the OIC's complaint handling process, including administrative services, an intake or early resolution unit, and a review of the OIC's service standards for investigative procedures. The study involved one-on-one interviews, group interviews, focus groups and a comparison to organizations involved in investigative processes. As team leader, was involved in all aspects of the study. (2007-2008)

Parks Canada

- ▶ Assisted Parks Canada to develop appropriate performance indicators for eleven business cases. Provided expert advice to management teams in ten national parks on performance measurement, indicator development and performance reporting in support of the development of business cases to obtain funding for multi-year projects to improve ecological integrity within the national park. (2004)

Public Service Commission

- ▶ Participated in the evaluation of the External Recruitment Programs at the Public Service Commission. The study involved a survey of university recruits and hiring managers. (1993-1994)

Public Works and Government Services Canada

- ▶ Developed and tested performance measures for the On-line Informatics Professional Services (IPS) Pilot. Included in this study was the refinement of an existing IPS performance framework and set of performance measures; the assessment of the validity and reliability of current sources of information required to address measurement needs; and, the design and pre-test of data collection instruments and a collection methodology (e.g., sampling design) for measures previously identified which have insufficient current information available. Random sample surveys were conducted of 103 clients from departments using the service as well as of 175 representatives from supplying companies. The work was summarized in a specialized performance report for IPS. (1997)
- ▶ Conducted an evaluation of Electronic Procurement and Authorization (EPA) system to determine its success and therefore provide management with the required performance information for its Treasury Board submission to obtain funding for the expansion of the EPA pilot to the Electronic Procurement and Settlement (EPS) system. (1995)
- ▶ Developed an evaluation framework for EPA and EPS pilot projects and subsequently produced a Performance Evaluation Criteria for the use of the Director of the EPS Project. This analysis was completed by document reviews, interviews and a workshop involving representatives of the various stakeholder groups. (1994)

Revenue Canada (now Canada Revenue Agency)

- ▶ Designed and delivered a two-day workshop to assist the Revenue Collections Directorate of Revenue Canada develop a performance measurement system for the Revenue Collections Program. The workshop defined key results, performance indicators, information services and gaps. The report focussed on results of the workshop, a blueprint for reporting, an action plan, and a communication strategy. (1997)

Service Canada

- ▶ Provided senior management of the Web Channel Office with an approach to measuring the performance of the Office. The study involved a workshop with WCO staff and managers as well as one-on-one and group coaching to develop a results-based logic model and performance measures for the Office as a whole that reflected the work undertaken by all parts of the Office. (2007)

Solicitor General Canada

- ▶ Managed a study to develop the RMAF for the department's First Nations Policing Policy and Program (FNPP). Preparing the RMAF involved review of documents, a one-day workshop with departmental representatives as well as meetings with program management. (2002-2003)

Springboard

- ▶ Developed a performance measurement strategy for Springboard. The study involved review of relevant documentation, a one day workshop to develop a logic model, consultations. The purpose of this study was to meet Atlantic Canada Opportunities Agency's (ACOA) reporting requirements and ensure that these requirements could be adapted to meet the needs of other government departments and agencies. (2005)

Standards Council of Canada (SCC)

- ▶ Conducted a survey for the Standards Council of Canada (SCC) to review the Canadian industry's experience with ISO 9000 and ISO 14001 families of quality and environmental management standards. Completed this project using a four-phased approach: survey design, survey testing, survey implementation, and data analysis and reporting. The essential components of this study included the experience and attitudes of the private sector in general, in respect to ISO standards, and their attitudes. The study involved 5 survey populations, 9 questionnaires, and close to 3,000 completed interviews. (1998-1999)

Tax Court of Canada (TCC)

- ▶ Performed a survey pre-test for Tax Court of Canada. The key steps that were undertaken included: coding, data entry, analysis, and reporting. Analysis was performed according to: type of appeal and application, province, type of representation, and language. A report which provided an analysis of the success of the pre-test as well as a section on the survey results and implications was then prepared. (1998)
- ▶ Assisted TCC with the development of a performance management system. Facilitated a workshop to develop a performance framework, measures, sources, and gaps. Also involved in developing an implementation plan for TCC. (1997)

Transport Canada

- ▶ Assisted Transport Canada with the development of performance measures for the Corporate Services (CS) group. The workshops introduced the principles of performance measurement, defined key results areas, associated performance indicators, and information sources. (1999)
- ▶ Undertook a study to provide consulting assistance to Transport Canada's Corporate Services (CS) group in developing service standards. In specific cases, these standards were the basis for developing service level agreements between its service line components and client organizations. The study involved a workshop with selected representatives of each CS group to discuss the principles of service standards. On-going coaching was also provided in developing

the service standards. In addition, focus groups were held with CS clients to review the service standards. (1999)

Treasury Board

- ▶ Managed a study to provide advice to the Treasury Board Secretariat (TBS) Internal Audit and Evaluation Division with respect to developing an effective process for managing evaluation activities within TBS. The project included in-depth interviews with senior officials of TBS to scope the evaluation universe, a comparative study of other federal evaluation functions, documentation and policy review, as well as an e-mail survey of other jurisdictions. Included within the scope of this study was the development of organizational options to consider, recommendations for a governance structure, planning process, project management and quality control considerations for managing evaluation functions within the federal context. (2003)
- ▶ Provided training to TBS Analyst on the components of RMAFs and, in particular, the approach to strategic RMAFs. (2002)
- ▶ Designed a quarterly reporting tool for Service Canada Access Centres. The project involved conducting a full day workshop with Service Canada staff and national co-ordinators to determine key performance indicators that need to be measured and reported quarterly. A draft report was developed and pretested with 22 centres and changes were made to the report based on discussions with management on the pre-test findings. (2001)
- ▶ Developed an evaluation framework for the Early Departure Incentive Program (EDI) and Early Retirement Incentive Program (ERI). The study involved determining issues related to the relevance, success (results), and cost effectiveness of the two programs and developing options for a future evaluation of the program. This was done through a documentation review, workshops to develop a performance framework for the programs and to discuss potential evaluation issues, and additional consultations with representatives of departments and central agencies. (1996)
- ▶ Conducted a review of current performance measurement practices in the Canadian federal government. This major department-by-department analysis involved developing key questions, reviewing documentary evidence of performance measurement and its use in management, identifying key federal contacts for performance measurement in departments and other entities, reviewing submissions to Treasury Board and performance measurement work readily available, designing a collection instrument to gather the required information, collecting information from participating federal entities, developing typologies or categories of performance measurement development, and reporting on performance measurement. Over 25 departments were analysed. (1995)
- ▶ Developed an evaluation framework for the policy review of the contracting status of the Canadian Corps of Commissionaires (CCC). This framework provided the practical vision of the policy in terms of activities, outputs, reach, direct impacts, and long-term impacts. The framework established the context, orientation, and methodologies for a future evaluation of this policy. Methodologies included document reviews, interviews and a half-day workshop. (1994)

Western Diversification Canada

- ▶ Provided critical commentary and advice on the draft final evaluation report for the WDP summative evaluation. Our role was to ensure that the evaluation used sound evaluation techniques and methodologies to arrive at findings, methodologies and recommendations.
- ▶ Developed a Horizontal Results-based Management and Accountability Framework (H-RMAF) for the Capacity Building and Financing Programs within the Federal Initiatives in Support of the Social Economy for Western Economic Diversification (WD), Industry Canada (IC) / FedNor,

Atlantic Canada Opportunities Agency (ACOA), Community Economic Development for Quebec (CED-Q) and Social Development Canada. The study involved a document review, a one-day workshop to develop the logic model and preliminary performance indicators, follow-up consultations and the preparation of the RMAF document. (2005)