

## **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)