Service
Function #5

Service
Function #1

Service
Function
#4

Service
Function
#2

Service
Function
#3

Building a Performance Framework
for LBS Support Organizations

Written and developed by
Lindsay Kennedy
for
Project READ Literacy Network, 2008

Acknowledgements

Project READ Literacy Network Waterloo-Wellington
298 Frederick Street, Kitchener, ON Canada   N2H 2N5
www.projectread.ca

Table of Contents

Table of Contents (continued)

Notes

This document was originally written as a preface for the first draft of the logic models and performance indicators that was shared with LBS support organizations in October and November 2008. The body of this document was revised in December 2008. The logic models and performance indicators were not revised.

In late November 2008 staff from most Literacy and Basic Skills (LBS) support organizations (regional networks, provincial sectoral and umbrella organizations) participated in a full day workshop to review the framework—the logic models and performance indicators for the five Ministry of Training, Colleges and Universities (MTCU) service functions. The workshop provided the opportunity for organizations to increase their understanding of the framework and to begin to see how to use it in their organizations.

The framework, as a "living draft" in December 2008, is not mandatory. The intent of the project was not to create a cage. Rather, the intent was to provide the opportunity for support organizations to become more familiar with the ideas and concepts of this type of performance management and measurement.

During the November 2008 workshop Sande Minke[1] provided the following information about the general direction of performance management for LBS support organizations:

> "… [MTCU] will be using a performance management framework that looks remarkably similar to the CIPMS system that LBS [delivery agencies] have been developing and implementing for the past 8 years. The dimensions of effectiveness, efficiency and customer service are the same, and you will see that the framework will identify measures and standards to evaluate the delivery of services funded by EO. It states clearly that 'An accountability framework is being developed to monitor the success of new services and programs.' So presumably these measures and standards will be developed for the new literacy service/program as the program itself is developed….

---

[1] Sande Minke, Consultant, Western Region. Literacy and Basic Skills (LBS), Ministry of Training, Colleges and Universities.

> The most important thing is to learn how to function within such an environment, to put in place the processes you will need to perform in order to meet the requirements of the system: the "Measuring, Planning, Resourcing, Communicating" elements of organizational capacity...
>
> ... this project has been about drafting core measures and indicators, based on your current service functions, so that you can be as familiar and comfortable with functioning within the EO accountability system as the LBS delivery agencies."

A performance *framework* should provide a set of predetermined outcomes and describe how progress towards the outcomes will be assessed and evaluated. Performance *measurement* should tell you how resources are being used (efficiency), how the work you do contributes to the achievement of stated outcomes (effectiveness) and whether or not your "customers"—LBS delivery agencies and other stakeholders—are satisfied with the results.

In this document, the logic models are referred to as "living drafts". It is hoped by using this phrase that the people who work in the LBS service support organizations in Ontario will take the logic models and performance indicators and make them "live" in that organization. In other words, they will make the revisions they see as necessary to ensure that the framework is a "fit" for their organization while supporting the development of a consistent system-side performance management system.

Preface

The purpose of *Building a Performance Framework for LBS Support Organizations in Ontario* (CIPMS for LBS Support Organizations*)* was to provide support organizations with the opportunity to **enhance** their understanding of the key processes and elements of Continuous Improvement Performance Management (CIPMS)—as it applies to them. Funded by the Ministry of Training, Colleges and Universities (MTCU), Project READ Literacy Network engaged a project consultant. The work was supported by an advisory team that included staff from a cross-section of LBS support organizations and from MTCU. The final product of the project was a performance framework that includes sample outcome statements, performance indicators and measurement tools.

Methodology

During the project, staff from all LBS support organizations were interviewed and two face-to-face workshops were held. Business plans were requested from a wide sample of organizations. The first workshop served as a basis to introduce the project and to provide staff with a basic understanding of logic models. The second workshop, held towards the end of the project, provided the opportunity for organizations to review and discuss the draft framework and identify next steps.

Logic models, using MTCU service functions as the starting point, are the basis for the performance framework. Logic models are used by many non-profit agencies (the United Way being one of best known) to describe programs, to focus attention and resources on priorities and for program evaluation. This multi-function ability allows you to create a clear and easy to understand "picture" of a particular point in time, based on certain assumptions.

Logic models are built on a set of "if-then" statements. For example:

- **If** you have access to certain resources, **then** you can use them to accomplish your planned activities

- **If** you accomplish your planned activities, **then** you will deliver (in theory) the amount of product and/or service that you intended

- **If** you accomplish your planned activities to the extent intended, **then** your participants will benefit in specific ways

⊛ **If** these benefits to participants are achieved, **then** certain changes in organizations, communities or systems might occur under specified conditions.[1]

Support organizations in Ontario include regional networks, sectoral organizations (community-based, school-board and college-based) and provincial umbrella organizations working in the Anglophone, Francophone, Native and Deaf streams. Currently, MTCU funds **all** service and support organizations[2] for **five service functions**:

1. Supporting LBS funded delivery agencies to deliver coordinated, quality services responsive to emerging needs (identified by the community and government) within an integrated training and employment system

2. Providing support for ministry led initiatives using a model of continuous improvement

3. Developing and providing accessible, quality resources that support LBS-funded agencies to deliver a quality LBS program.

4. Supporting professional development of LBS-funded agencies to effectively deliver the LBS program

5. Supporting the production and integration of research and development results and products that are linked to and support the LBS Program.

Throughout this document we'll refer to the service functions in this order. For example, a reference to service function #1 will always mean the service function that says you support LBS funded delivery agencies to deliver coordinated, quality services responsive to emerging needs (identified by the community and government) within an integrated training and employment system.

The language of performance management can be new to some people. A glossary of terms has been provided (see Appendix "A").

---

[1] *Logic Model Development Guide*. W.K. Kellogg Foundation, 2004.

[2] Please note: Support organizations, as noted above, are the umbrella, sector and regional networks funded by MTCU. **Service** organizations are the three resource agencies: Centre Fora, AlphaPlus and Ningwakwe Press. This project did not involve these agencies as the type of work they do to support the literacy field in Ontario is vastly different from the work of all other support organizations.

Building a Performance Framework

Continuous improvement performance management (CIPMS) is described by the Ministry of Training Colleges and Universities (MTCU) as a:

> "… framework for program measurement and management that incorporates a number of day-to-day operations including data collection, client satisfaction, agency self-assessment and outcomes-based program evaluation. Core measures and performance indicators are used to provide an overall picture of what a program aims to achieve, what it actually achieves and how well it meets its goals. CIPMS is an ongoing cycle of implementation, monitoring, reacting and measuring. CIPMS shifts the focus away from the processes we use to the results we achieve. Data gathered and analyzed as part of CIPMS can be used in the community by agencies to promote the results we achieve, for learner recruitment, for fundraising and so on. The same data can be used on a provincial level by MTCU to promote the LBS program within government and to the public at large. Together, we can use CIPMS to definitively and confidently showcase our successes."

So what does that mean in terms of the work that support organizations do? We'll use MTCU's description of CIPMS will help to answer that question.

Day-to-day operations: CIPMS is a process. The intent is not to impose an additional system of monitoring on an organization. Rather, the intent is to ensure that activities that you are already doing are re-shaped or modified in a way that allows you to demonstrate three cornerstones of CIPMS: *effectiveness, efficiency and customer satisfaction.*
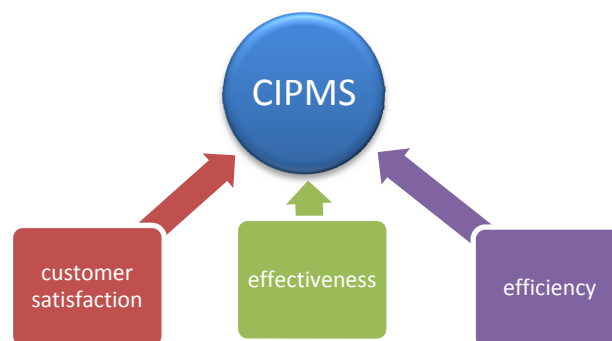
Cornerstones of continuous improvement

In some cases you may need to add data collection mechanisms to activities you are already doing, but for the most part you may only need to re-frame your activities in terms of language and description. For example, indicating that 90% of the practitioners signed up to participate in a training activity is a valid measure. Additional data, however, will allow you to demonstrate your ability to achieve the three cornerstones of CIPMS. For example, you could collect data that answers questions such as: what did they learn, how will they apply the new knowledge and did you provide the workshop in an effective manner?

Core measures and performance indicators: You already have some core measures and performance indicators in place. When you create your annual business plan you are required to use the service functions/categories set by MTCU to describe your activities for the coming fiscal cycle. Also, MTCU, within its annual business plan process, sets a number of priorities. In the business plan you describe your approach to these priorities. The activities you describe, the expected results and the evidence of results that you will gather are an integral part of CIPMS.

Ongoing cycle: Implementation, monitoring, reacting and measuring are built in features of any continuous improvement system. With the implementation of a performance management for LBS support organizations, the focus will be on ensuring that you are using available resources to build your capacity to achieve the service functions and priorities set by MTCU. In other words, the focus will be on how you support delivery agencies and how you measure the successful achievement of your stated outcomes.
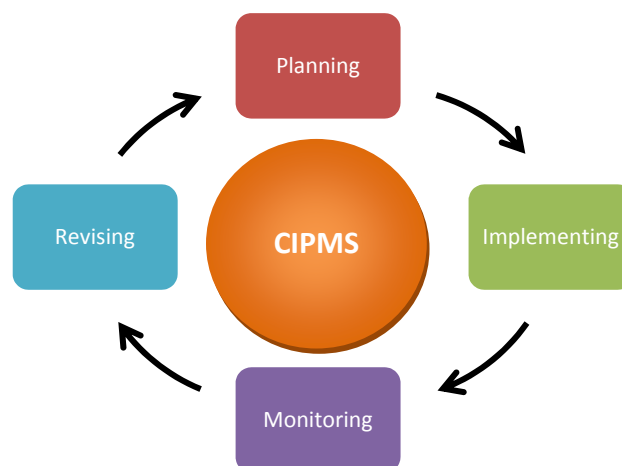
Continuous improvement means just that - an ongoing cycle of planning, implementing, monitoring and revising, but in an organized and logical way.

Results achieved: As stated in MTCU's description of CIPMS, focus shifts away from the processes you are engaged in and shifts towards to the results you are achieving. As a framework, you can use CIPMS to monitor and improve what happens within your own organization in a timely and efficient manner. A benefit of a performance management *system* is that data collection and analysis can become consistent across the province. This will contribute to the overall development and strengthening of the LBS system within Employment Ontario.

Support organizations play an important role in the current LBS system. CIPMS will help you become better at what you do because it will allow you to focus on the areas where you need to make changes and help you to enhance areas where you are already doing good work.

At the "heart" of performance management (CIPMS) is the logic model.

What do logic models have to do with CIPMS?

Logic models were developed initially as program evaluation or monitoring tools. They are valuable tools for this because they use performance indicators to demonstrate how outcomes will be achieved. Logic models are used now as tools for program planning and implementation.

Logic models provide a useful way to examine and explain what you want to achieve (program planning and implementation) and how the work you do will contribute to changing literacy in Ontario (program evaluation). The information can be presented in a way that makes it easy for others to gain an understanding of what it is you do as an organization. Assumptions, inputs, outputs and outcomes are the standard components of most logic models.

Ideally, anyone given one of the logic models could gain a strong sense of what you do, how you do it and the resources you need. Built on a solid set of assumptions, logic models will help you to illustrate a program or service in terms of the resources you need (inputs), the results you want to achieve (outputs) and how your work will help contribute to the literacy field (outcomes).

What does a logic model look like?

A logic model can take many shapes. In this document, as you can see in the diagram below, the information in the logic models is set up in a table format with numbered lists.

SAMPLE LOGIC MODEL			
Service Function #4 –Support professional development of LBS-funded agencies to effectively deliver the LBS program			
ASSUMPTIONS The support organization is committed to providing literacy practitioners with the opportunity to gain skills and knowledge. LBS delivery agencies and support organizations recognize the key role support organizations play in the provision of high quality training for the literacy and essential skills field (instructors, managers, volunteers and others).			
Inputs	**Outputs**		**Outcomes**
	Activities	**Results**	**Immediate, Intermediate & Impact**
1. Market research (topics) 2. Needs Assessment (Organizations &/or	1. Target Markets for PD training researched and	1. Practitioners are trained and/or informed	**Immediate** (changes in awareness, knowledge, attitude, opinions, motivation):

Information in a logic model can look "locked in" but the intent is to create an easy to understand illustration of what you are doing.

Some people get concerned when they see a logic model like the one above because it looks inflexible. But the *intent* of a logic model is just the opposite. In simple terms, a logic model is a way to think about and describe the work of your organization. It's a way to describe cause and effect[3].

The University of Wisconsin, a leader in program logic model theory and application, describes logic models as a useful way to "help clarify expected linkages, tease out underlying assumptions, focus on principles to test, educate funders and policy makers, and move a program into action and learning." Taylor-Powell and Henert[4] suggest you think of the "if-then" relationship between outputs and outcomes like this:

---

[3] Causation has been described as the relation between mosquitoes and mosquito bites (Scriven, 1991: 77).

[4] *Developing a Logic Model: Teaching and Training Guide.* Ellen Taylor-Powell and Ellen Henert. University of Wisconsin-Extension. Madison: 2008.

"If you have certain resources, then you will be able to provide activities, produce services or products for targeted individuals or groups. If you reach those individuals or groups, then they will benefit in certain specific ways in the short term.

If the short-term benefits are achieved to the extent expected, then the medium-term benefits can be accomplished.

If the medium-term benefits for participants/organizations/ decision-makers are achieved to the extent expected, then you would expect the longer-term improvements and final impact in terms of social, economic, environmental, or civic changes to occur.

This is the foundation of logic models and the theory of causal association."

There is no right or wrong way to create logic models. Ideally, however, logic models are created as part of your program planning and design process. They develop as part of an ongoing consultation and development process. Some of the discomfort with the logic models in this performance framework may arise from the fact that they were done *for you*, using information collected from a variety of sources: one-to-one interviews, feedback from training workshops, business plans provided by many support organizations.

What are the limitations?

Before we start to look at how the logic models for this performance framework were created, we want to look at some of the limitations of logic models. As you can see from the above description of the "if-then" relationship, logic models describe what you *intend* to do. They don't necessarily reflect the reality of what happens.

Here are the most common limitations of logic models:

- ↪ If you focus only on expected outcomes, you may overlook unintended outcomes (positive and negative)

- ↪ If you focus only on positive change, then you may overlook any negative impact that change can have

⇄ You may over simplify the complex nature of cause and effect, when the reality is that many factors influence process and outcomes

⇄ You can get caught up in creating a logic model and lose track of whether the activities or outcomes are the right ones

⇄ Logic models may stifle creativity and spontaneity. [5]

---

[5] Adapted from *Developing a Logic Model: Teaching and Training Guide.* Ellen Taylor-Powell and Ellen Henert. University of Wisconsin-Extension. Madison: 2008.

Logic Model Development

The development of a logic model usually starts with creating a clear definition of a problem or issue. From that point on, the process is one of data gathering and analysis. For this project, the MTCU service functions served as the starting point. This was followed by one-to-one discussions with staff from all LBS support organizations and an examination of over 15 business plans from a cross-section of support organizations. Again, the purpose of the project was to create *samples* or *templates* of logic models and performance indicators that can serve as starting points.

In the following sections we'll take a look at the component parts of a logic model: assumptions, inputs, outputs and outcomes. We'll use information from the "living draft" logic models to illustrate the type of information that is needed for each component. Don't forget: The list of assumptions, inputs, outputs (activities and results) and outcomes are not meant to be exhaustive or prescriptive. They should be considered as starting points. Of course, you can use the information in each logic model table as is, but you will probably want to refine it to more closely represent the work of your specific your organization.

ASSUMPTIONS

Despite the colloquial definition that you often hear about the word assume, logic model assumptions are statements that are based on what you know to be true, or certain, about a given situation at a *particular point in time*. Assumptions can also be made about things that you hope will be true in the future, as a result of certain actions. Almost everything we do is based on one assumption or another.

In terms of creating a logic model, examining our assumptions helps to make them explicit. Making them explicit will help you to determine whether or not the assumption is valid and what criteria it is based upon. As situations change so will your assumptions. This will cause a chain reaction throughout the logic model. But don't forget – the "CI" in CIPMS is about continuous improvement. Things **will** change!

Let's look at an example from one of the "living drafts". Service function #2 says that support organizations will provide support for ministry led initiatives using a model of continuous improvement. Here are the *assumptions* that were created for this service function:

> The support organization is committed to enhancing the field's ability to provide quality service delivery to adult learners.

1. MTCU initiatives/priorities are indentified through an internal planning process that reflect larger MTCU planning and directions; they are communicated to support organizations through the annual business plan development and by special communications to the field

2. MTCU's rationale for an initiative or priority area is described in a clear uniform manner to all support organizations

3. MTCU provides sufficient resources (monetary and human) to allow for implementation of initiatives (new and/or ongoing) across regions, sectors and/or streams

4. Support organizations have limited ability to control the roll out of MTCU initiatives/priorities

5. Support organizations engage in the process of providing information about and/or training for MTCU initiatives/priorities in a positive and supportive manner

6. Support activities relating to a specific initiative or priority area are developed based on information available at a particular point in time.

These assumptions were created based on consultation with MTCU staff and with the project advisory team. As you begin to work with the logic model for this service function you will need to decide if the assumptions are valid for your organization and, if not, what changes you will make to ensure that they are valid.

INPUTS

In a logic model, inputs are the resources you will need to accomplish the activities that you have identified. Let's take a look at some of the inputs noted for service function #1. This service function says that your role is to support LBS funded delivery agencies to deliver coordinated, quality services responsive to

emerging needs (identified by the community and government) within an integrated training and employment system. As you will see when you review the logic model for this service function (see page ___), it has been divided into three parts: community planning[6], outreach and networking.

Here are *some* of the inputs that were identified for this service function:

- ➲ Funding for
    - o Community planning process
    - o Information dissemination
- ➲ Participants - LBS staff; Partners; Key collaborators (other EO agencies, other service providers, other agencies)

OUTPUTS

Outputs focus on answering "what" questions. For example, what will you be doing and what do you hope to achieve? In our logic models we've divided outputs into two types: *activities* (what you will be doing) and *results* (what you hope to achieve). The discussion about outcomes is below, but for now we'll say that results are not the same as outcomes. Outcomes, as you will see, focus on answering the "so what" question.

Here's an example: an output *activity* (what you will be doing) could indicate that you will deliver five face-to-face workshops. The output *result* (what you hope to achieve) could be that 40 practitioners received training on a current MTCU initiative or "hot" topic.

There two important notes about outputs you will see in the logic models: (1) many cross more than one service function; (2) most are activities you are already doing. Take data collection for example – you already collect data and some of that data can be used to demonstrate that you are doing what you have been

---

[6] Community planning in this document, and in the logic models, refers specifically to the literacy community, not the broader community. It would include Literacy Services Planning meetings, focus groups and other methods used to collect and analyze information from member organizations (LBS and non-LBS). For example, a provincial organization could use its board members as a focus group to collect information, or an annual online survey of member needs/priority issues could also contribute to the community planning you do on behalf of the community you represent.

funded to do *across* a number of service functions. What you may need to do is enhance or broaden the scope of your current survey.

Below are a few of the activities from the community planning section of service function #1 and two of the results:

Activities

1. Data collection (emails, meetings, focus groups, questionnaires, community consultations)
2. Key initiatives identified and prioritized
3. Promotional materials developed in a variety of formats (printed, online, multimedia)
4. Website updated on a regular basis

Results

1. Key literacy and essential skills initiatives are promoted to:
    - General community
    - Potential learners
    - Employers
    - Media
    - EO/LBS service delivery agencies
    - Government departments and agencies

2. Delivery services available in a region/sector clearly identified.

OUTCOMES

Outcomes are really the key focus of the type of logic model used to create this performance framework. Outcomes are specific statements that capture what it is you are trying to change. The statements should answer the "so what?" question. Outcomes are usually divided into short-term, mid-term and long-term. In this framework we've described these as **immediate** (short-term), **intermediate** (mid-term) and **impact** (long-term).

There are no time lines set to these outcomes because time lines may vary from service function to service function. Instead we say that immediate outcomes reflect changes in things such as awareness, knowledge, attitude, opinions and motivation; that intermediate outcomes reflect changes in things such as behaviours, practices, decision-making and policies; and finally, impact outcomes reflect changes in things such as reputation, position, funding, opportunities and learner satisfaction. In other words, immediate outcomes are about l*earning*, intermediate outcomes are about taking *action* based on what you've learned and impact outcomes reflect the *change* in conditions that will result at some point in time as a result of your actions.

Let's go back to one of the results from the community planning section of service function #1 shown on the previous page: Key literacy and essential skills initiatives are promoted to a variety of stakeholders (and general community, potential learners, employers, media, EO/LBS service delivery agencies and government departments and agencies as given as examples). Keep in mind that this activity is only an *example* of the type of activity that can contribute to an outcome. Read the statement again.

Now ask "so what?" What would you expect people or organizations to *learn* from your promotion? What *actions* would you expect people or organizations to take? What would *change* in the long-term? For example, is it not possible that **if** this type of activity contributes to increased opportunities for communication and collaboration between and among LBS agencies, **then** literacy service delivery agencies and support organizations will work together to provide a training and employment system that is more responsive to indentified community needs? And in the long term, is it not possible that **if** your organization contributes to the process by collecting data and information, **then** you can see how you are contributing to the results that LBS funded delivery agencies must achieve?

Let's look at another example: While you are at a marketing workshop you may increase your knowledge of a particular aspect of marketing (immediate outcome). The next week you discuss the workshop with a colleague or co-worker. Your discussion helps you to decide to make a change to what is said when someone calls looking for information and how the call is documented. After a period of time you find out that people have been so pleased with the information they received they are suggesting to others to call your organization. In this example, it could take many months before the new information is ready to be used and therefore many months before you see any intermediate outcomes

(change in practice); and it could take a year or more before an impact outcome is achieved (change in reputation).

When you start to use the logic models you should see the interconnectedness between the inputs and outputs (activities and results) and the outcomes – the "if-then" relationship. Going back to our marketing example, you can probably *attribute* your decision to make a change to your process to your participation in the workshop fairly easily (e.g., "hey! I was just at this great workshop on marketing and there I learned that..."). As you move farther away from a specific activity, however, it can become more difficult to directly attribute the outcome to the activity.

What you should be able to do, however, is be able to demonstrate your *contribution* to the overall achievement of an outcome. If you change your intake information, then you should have a reasonable expectation that people will be happy with the information they received; if they are happy with the information they receive then it is possible that they will recommend you to someone else.
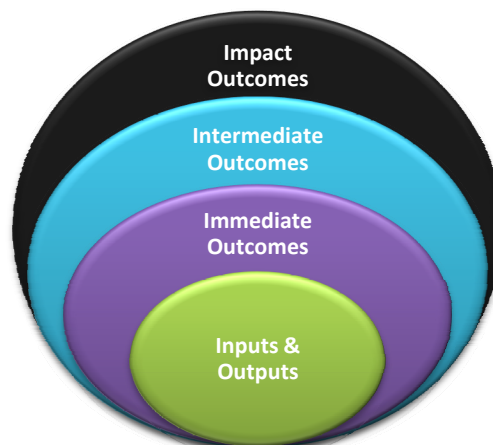
The farther away you move from the inputs and outputs, the more difficult it will be to **attribute** the outcomes to a specific activity or event. You should, however, be able to demonstrate the **contribution** you are making.

In the marketing example, how easy will it be to attribute the change in practice (intermediate outcome) or the change in reputation (impact outcome) to the workshop? If you ask people when they call how they heard about your organization, then you are in a better position to document a direct link to the information you have provided in the past. If you can't make a direct link to it,

can you find a way to link what you have done to the changes you have made? Careful wording of outcomes and careful selection of performance indicators should allow you to do this.

A final word on outcomes

The MTCU service functions have been used as the basis for the developing this performance framework. The current (2008) service functions are part of the mechanism that the MTCU uses to fund support organizations. The service functions are also part of MTCU's LBS logic model. Currently MTCU has described what it sees as the results of funding in terms of "Business Results" and Program Results".

Here are the business results:

➲ Quality LBS service for learners that improve over time

➲ Research and development linked to/supports LBS strategies and innovation

➲ Integrated approach to LBS program

➲ Effective partnerships with referral, support and transition partners

➲ Effective communication, marketing and stakeholder engagement

➲ Accessible, quality materials/resources across all streams

➲ Practitioners trained in delivery of LBS program

The medium and long term program results, that MTCU expects from the LBS program include:

Medium Term	Long Term
➲ Increase in the employability of LBS learners	➲ More literate Ontario
➲ Increase in LBS learners participation in further training and education	➲ More individuals participating in lifelong learning
➲ Increase in LBS learners literacy and essential skills	➲ A skilled workforce
➲ Increase of learners attainment of their short-term LBS goal	➲ Stronger communities

Medium Term	Long Term
⮂ Increase of LBS learners participating in the community	

Since your role is to support LBS delivery agencies, then you need to be able to demonstrate how you are contributing to their success. The framework developed by this project provides support organizations with a mechanism to demonstrate to MTCU what a useful performance management framework should look like. By working with the framework and adjusting the "living drafts" to better fit your organization, you have an opportunity to inform MTCU about the types of outcomes that make sense based on these service functions.

That is not to say that the service functions or the above outcomes will stay the same. It is possible that they too will change. Again, what you have *now* is an opportunity to develop your skills – to become familiar and comfortable with the process so you can work within it confidently in the *future*.

Performance Indicators & Measurement Tools

Each outcome in the "living drafts" has a set of performance indicators and a list of tools that can be used to measure each indicator. Key Performance Indicators (KPI) are the evaluative component of each logic model. **KPI are quantitative or qualitative measurements/demonstrations of activities (events, operations or processes).** They are set prior to an activity taking place.

PERFORMANCE INDICATORS

Performance indicators are the specific pieces of information that you will collect, document and analyze so you can demonstrate how you are achieving an outcome. Indicators allow you to demonstrate your ability to achieve the cornerstones of CIPMS: effectiveness, efficiency and customer satisfaction. In other words, the indictors describe what evidence you will provide to track your progress or success.

The performance indicators and measurement tools for *one* of the immediate outcomes for service function # 5 are shown in Preface Table 1 on the next page. This is the service function that says your role is to support the production and integration of research and development results and products that are linked to and support the LBS Program.

The outcome statement shown indicates that if you have supported the production of research **and** the integration of the results of research into current practice, then the field as a whole will have practitioners who have better skills and more knowledge. The performance indicators describe how you will decide whether or not this has happened. For example, what percentage of the practitioners reports an increase in knowledge of specific topic/issue, do they feel better equipped to teach or to manage the LBS program, are they using the information you have given them to provide a better learning environment for learners?

PREFACE TABLE 1 Immediate Outcomes: Key Performance Indicators & Measures

Service Function #5A – Support the production and integration of research and development results and products that are linked to and support the LBS Program

Immediate Outcomes	Performance Indicators	Measurement Tool
1. LBS field has practitioners (support organization staff, instructors, program managers and/or volunteers) with increased skills and knowledge	% of practitioners who report an increase in knowledge of specific topic/issue % of practitioners who report an increase in confidence to teach % of practitioners who report and increase confidence to manage LBS agency % of practitioners who report using information from a specific resource/training session % of practitioners who report an increase in awareness of specific topic/ issue % of practitioners who	• Needs assessment survey • Pre- & post-training evaluations • Information/event survey • Resource evaluation

> Performance indicators should allow you to measure effectiveness, efficiency and customer satisfaction.

BASELINES and BENCHMARKS

A baseline is a set of data which reflects the current state of affairs. A benchmark is a standard against which the performance can be measured. In general, baselines reflect current practice and benchmarks reflect the goal you are working towards. Change is monitored through setting targets.

The draft indicators do not give you baseline or benchmark information. For example, if the indictor is the percentage of the practitioners who report an increase in knowledge of specific topic/issue, then what per cent will give you reliable data? Is it 20% or 90%?

Before you, as a service support organization, can set baselines and benchmarks you have to work with the logic models to determine if the draft performance indicators are ones you want to keep or determine which ones you want to focus on within a certain time frame. Once you have verified or determined which KPI are relevant, then you can set baselines and benchmarks. Below is a six step suggested process for setting baselines and benchmarks.

Step 1 - Plan

- Select the indicators you want to work with

- Decide on how much information you require and how this will be obtained

Step 2 - Conduct Research

- Determine what information is available in-house

- Locate additional sources of information, as necessary (e.g., online, networking, research from other fields)

Step 3 – Partner with Others

- Rather than work alone, try to partner with at least one other service support organization

- Establish timelines and agree on a framework for sharing information

Step 4 – Collect, Share and Analyze Information

- Share data you have collected through observation, reviewing documents and other research

- Summarize the data you have collected

- Discussing findings with partnering organization

- Share your research with other staff members, board or others

Step 5 – Take Action

- Based on your analysis set baselines and benchmarks

- Create an action plan with reasonable targets and milestones

Step 6 - Continuous Improvement

➲ Check in and modify data on a regular basis, especially in the first year
In terms of Step 6 above, the review of the current targets and indicators will feed into the process of setting future targets. Here are some of the questions to consider as part of your continuous improvement process:

1. Which of the current indicators will you continue to collect? Will you add new ones?

2. What is the purpose of the target you've set? Is it a realistic assessment of what can be achieved or do you need to adjust it?

3. What do you want your indicators to show? (e.g., trends, comparisons with other areas, etc.)

4. Are there constraints or risks associated with the indicator/target?

5. Who is responsible for reporting the indicator and are joint working groups involved?

6. How will the data be collected? Does the indicator draw from existing data sources/targets? Do you need to create new tools?

7. Does the target require milestones to show interim progress?

8. How will the target be achieved (is there an action plan or work underway to address the target)?

9. Are the targets SMART: Specific, Measurable, Achievable, Realistic and Timely?

10. If other organizations are involved, has everyone been consulted and does everyone agree to the target?[7].

See Appendix "B" for a sample Indicator Criteria Checklist.

---

[7] Adapted from *Community Planning Partnership Proposal to Review Performance Management.* Retrieved from www.eastlothian.gov.uk/documents/.../Proposal%20to%20Review%20 Performance%20Management June 2008.

MEASUREMENT TOOLS

Take a look at the tools listed in the "Measurement Tools" column of Preface Table 1-1 (page 17). These four tools are suggested as the tools you can use to collect the data you need.

When you look at the logic models for all the other service functions you will notice that the "pool" of tools is small. The four tools you see in Preface Table 1 are used to collect data for other performance indicators most of the service functions. This means that the same tools can provide information that can be fed into many of the logic models.

You will find examples of each of the tools in the "Sample Tool" section of this document. It's important to remember that these are only meant as examples. You may have tools that you use and like.

Immediate Outcomes at a Glance

This section provides a listing of the **immediate outcomes** for each of the service functions. Immediate outcomes are about learning. They usually identify changes in things such as knowledge, attitudes and/or motivation. These outcomes should be the easiest to document and measure because the information is collected soon after an event or activity. In other words, you can *attribute* your activities directly to the outcomes.

Don't forget, these outcomes, like all the information is the logic models, are draft outcomes. They may or may not "fit" your organization. The service function statements are current at the time this document was written.

Service Function #1

Support LBS funded delivery agencies to deliver coordinated, quality services responsive to emerging needs (identified by the community and government) within an integrated training and employment system.

Please Note: This service function has been divided into three distinct but over-lapping areas: community planning, outreach and networking.

Community Planning – Immediate Outcomes:

1. Opportunities for communication and collaboration between and among LBS agencies are increased.

2. Opportunities for communication and collaboration between LBS and non-LBS service providers are increased.

3. Service coordination among LBS delivery agencies is improved.

Outreach – Immediate Outcomes:

1. Communication about and marketing of LBS services is responsive to community needs and demographics.

2. EO and other community partners have increased understanding of LBS service delivery options for adult learners.

3. Service coordination among LBS delivery agencies becomes more effective.

4. Potential learners have the information they need to make informed decisions about education and training options.

Networking – Immediate Outcomes:

1. EO and other community partners have increased understanding of LBS service delivery options for adult learners.

2. Support organizations and LBS service delivery agencies increase their understanding community partners' key issues.

Service Function #2

Provide support for ministry led initiatives using a model of continuous improvement.

Immediate Outcomes

1. Opportunities for partnerships and collaboration between and among LBS support organizations are increased.

2. Support organizations' abilities to help LBS funded agencies understand initiatives/priorities are increased.

3. Support organizations and delivery agencies have an increased understanding of their role in ministry led initiatives.

4. Data collection and analysis contributes to an increase in continuous improvement for both support organizations and delivery agencies.

Service Function #3

Develop and provide accessible, quality resources that support LBS-funded agencies to deliver a quality LBS program.

Immediate Outcomes

1. LBS delivery agencies will have an increased understanding of key topics/issues.

2. Support organization's capacity to support LBS delivery agencies is increased.

3. LBS delivery agencies' capacity to support LBS learners is increased.

4. Opportunities for partnerships and collaboration between and among LBS support organizations are increased.

5. Resource development contributes to an increase in continuous improvement for both support organizations and delivery agencies.

Service Function #4

Support professional development of LBS-funded agencies to effectively deliver the LBS program.

Immediate Outcomes

1. Support organization's ability to develop, organize and deliver quality training is enhanced

2. LBS field has practitioners (support organization staff, instructors, program managers and/or volunteers) with increased skills and knowledge

3. Support organization's capacity to support LBS delivery agencies is increased

4. LBS delivery agencies' capacity to support LBS learners is increased

5. Professional development contributes to an increase in continuous improvement for both support organizations and delivery agencies

Service Function #5

Support the production and integration of research and development results and products that are linked to and support the LBS Program.

Please Note: In your business plans, this service function is divided into two parts 5A and 5B. 5B is used to identify project ideas for future funding. Only the outcomes for 5A are shown.
Immediate Outcomes – 5A

1. LBS field has practitioners (support organization staff, instructors, program managers and/or volunteers) with increased skills and knowledge

2. Support organization's capacity to support LBS delivery agencies is increased

3. As a result of project work, LBS delivery agencies' capacity to support LBS learners is increased

4. Opportunities for partnerships and collaboration between and among EO and LBS support organizations are increased

5. Participation in research initiatives contributes to an increase in continuous improvement in both support organizations and service delivery agencies

As you can see, there are over 25 immediate outcomes. These outcomes relate to demonstrating the achievement of a specific service function – there is very little overlap or cross referencing from one service function to another.

In contrast to this, there are only seven (7) impact outcomes. In the next section we'll take a look at these outcomes and you'll see how several of them are used in most of the service functions.

Cross Match

Have you ever noticed how in a photograph it is the details in the foreground that are the most distinct? You can still clearly make out objects in the middle distance but the background objects are less distinct. Outcomes are a bit like that. In the foreground, or the period of time immediately after an activity, there are more things you can measure and document and more things that you can **attribute directly** to the activity or event. As you shift your focus to intermediate and impact outcomes there are fewer things that you can attribute directly to the activity. You can, however, demonstrate what you are **contributing** to these outcomes.

As previously mentioned, very few of the **immediate** outcomes "repeat" across the service functions. This is due in part to the fact that capturing the evidence or performance indicators for immediate outcomes is often easier to do and you can create very specific indicators for each service function. Of course, a few of the outcomes do repeat. As you read through the immediate outcomes in the previous section, did you notice that the outcome "Support organization's capacity to support LBS delivery agencies is increased/enhanced" shows up in three of the service functions?

Repetition happens more with the **intermediate** and the **impact** outcomes. In fact, for all the service functions there are only seven distinct impact outcomes. Don't forget that impact outcomes are long-term and usually represent changes in things such as reputation, position, funding, opportunities and learner satisfaction. Also, as just mentioned, the farther in time you move away from an activity the more difficult it becomes to attribute a specific change to a specific activity. For these outcomes, you will only be able to show the contribution you are making.

Here are the draft impact outcomes for **all** the service functions:

Impact Outcomes – all Service Functions

1. Better informed decisions by government about funding and policy.
2. Support organizations help LBS funded delivery agencies achieve expected results.

3. Literacy and essential skills emerge as major issues at other community planning tables.

4. For the general public, literacy and essentials skills for workplace, home and community are major issues.

5. Non-LBS agencies consistently record/note literacy and essential skills needs of clients and make appropriate referrals.

6. The literacy and essential skills field provides effective and efficient service to adults that is responsive to and part of an integrated education and training system.

7. Community partners and other EO agencies understand the role of LBS funded programs and services in an integrated education and training system.

In Preface Table 2 you can see which of the service functions have the same draft impact outcomes.

PREFACE TABLE 2 Impact Outcomes Cross-referenced to Service Functions								
Impact Outcomes	Service Functions							
	SF #1 – community planning	**SF #1 – Outreach**	**SF #1 – Networking**	**SF # 2**	**SF # 3**	**SF #4**	**SF #5A**	**SF #5B**
Better informed decisions by government about funding and policy	✔	✔		✔		✔	✔	✔
Support organizations help LBS funded delivery agencies achieve expected results	✔	✔	✔	✔	✔	✔	✔	✔
Literacy and essential skills emerge as major issues at other community planning tables	✔		✔					
For the general public, literacy and essentials skills for workplace, home and community are major issues		✔						

PREFACE TABLE 2 Impact Outcomes Cross-referenced to Service Functions, cont'd								
Impact Outcomes	**Service Functions**							
	SF #1 – community planning	**SF #1 – Outreach**	**SF #1 – Networking**	**SF # 2**	**SF # 3**	**SF #4**	**SF #5A**	**SF #5B**
Non LBS agencies consistently record/note literacy and essential skills needs of clients and make appropriate referrals		✔						
The literacy and essential skills field provides effective and efficient service to adults that is responsive to and part of an integrated education and training system				✔	✔	✔	✔	✔
Community partners and other EO agencies understand the role of LBS funded programs and services in an integrated education and training system							✔	✔

Linking it All Together – how do I use the framework?

When a logic model is completed it should tell a story. Like any good story, it will capture a point in time. It should start by building the background (the resources you will need). Then it should move on to provide some depth—character or story development (the activities you will engage in). And, like any good story it should move towards the denouement: how you define success and how you will know when you have been successful (outcomes and performance indicators).

Logic models do take time and resources to develop. Fortunately, the funding received for this project provided the opportunity to have logic models developed for each of the service functions.

At first glance, the information presented in the logic models may seem overwhelming. As you review and think about each one, you should begin to notice that activities, results and even some outcomes cut across one or more of the service functions. This means that some data can help you demonstrate your ability to achieve outcomes for more than one service function. You should also notice that much of the language is familiar to you because it describes things you are already doing.

You may also think that using the logic model, the performance indicators and/or the measurement tools will require you to drop everything else you are doing. That isn't the case. The "living drafts" of the logic models are meant to give you a place to start, modify or enhance your journey along the road of performance management improvement. What you need to do is take the drafts and develop a performance framework that fits your organization now and in the future.

In fact, here are a few things to keep in mind:

- ➲ The framework (logic models and performance indicators) is currently a living draft. You do need to decide, based on where your organization is at, which service function or which outcomes to focus on first.

- ➲ You are already doing much of the work describe in the logic models – the logic models and the performance indicators merely take what you already do (for the most part) and provide you with a way to clearly demonstrate the impact you are really making.

➲ While things are still in draft, they do provide a standardized framework that should allow and encourage collaboration with your colleagues in other support organizations in areas of shared interested and/or concern.

➲ The number of outcomes is finite and most of the measurement tools are ones you are already using.

Here's one suggestion for how you approach the logic model for each service function:

1. Make time for your review

Set aside a reasonable amount of time to review the logic models and to think about the implications for your practice.

2. Skim and Scan

Don't try to review the logic models in-depth on your first read; start by making yourself familiar with the layout of the document and then go back and read the Preface a second time; jot down questions that come to mind; then take another look at the logic models. This might be a good time to re-read "Immediate Outcomes at a Glance" or "Cross Match" sections.

3. Learn the Language

Logic models come with terms and concepts that may sound "foreign" to you; take the time to learn the difference between an input and an output, as an example. You may want to refer to the Glossary in Appendix "A".

4. Review and Reflect

Now review a logic model critically. Jot down your questions or ideas. Can you identify one or two areas where you think you should focus your attention? (Remember you'll want to start small!)

See Appendix "C" for sample questions for reflection.

Here's some additional information for you as you begin to work with the "living drafts' of the performance framework: [8]

- Outcome information is *vital* for indicating what needs to be done to improve future outcomes. Your choice of which performance indicators to track should not be determined by the extent of your influence over the outcome but the importance of the outcome those you serve.

- Performance indicators are not just *success* indicators. They should be used to identify where results are going well and where not so well. When things are not going well, you need to attempt to find out why. This process is what leads to continuous learning and improvement.

- It may be wise to start tracking only a very small number of the indicators, especially if you have limited resources. Not all outcomes or indicators listed in the logic models will be relevant to every support organization. Once your organization becomes more comfortable with outcome measurement, then you can start measuring more outcomes and indicators.

- Selecting which outcomes and indicators to monitor is crucial. Discussions with staff and board members, colleagues and others, to talk about which outcomes and which indicators to monitor, will be important. Discussion will also keep everyone aware of the outcome measurement efforts.

- Some of the most important outcomes and performance indicators will require new data collection procedures (such as doing follow up with practitioners at 3 or 6 months). You shouldn't give up too quickly on implementing such data collection procedures. Often, surprisingly inexpensive procedures can be used, especially when you have ongoing contact with the same practitioners.

---

[8] Adapted from *Building a Common Outcome Framework to Measure Non-profit Performance*. The Urban Institute, Washington D.C., and The Center for What Works, Chicago, Illinois. December 2006.

Cautions and Concerns

In October and November of 2008, support organizations received a draft of the logic models. In late November, support organizations were invited to attend a one-day workshop to learn more about the logic models and to spend time working with the framework. At the workshop, organizations were asked to submit their concerns in writing. Only four organizations provided critical feedback. The concerns expressed in this section are theirs.

1. While organizations understood that the logic models were working or living drafts, some organizations were concerned that they may not be given adequate time to gain a solid working knowledge of the logic models and performance indicators or they may not have time to revise the logic models to better fit their organization.

2. Some organizations were concerned about performance indicators that included learners. For example, one of the immediate outcomes for the community planning aspect of service function #1 says "Service coordination among LBS delivery agencies is improved" and uses the following as performance indicators and measurement tools:

Performance Indicator	Measurement Tool
# of new or revamped partnerships created in response to prioritize needs	• Community planning report • LSP service delivery charts spreadsheets • Newsletters (electronic or paper)
Information and referral protocols in place	• LSP report • LSP meeting minutes • LBS agency policy and procedures • Support organization policy and procedures
# of learners served by each agency	• IMS Data • Community planning report
% of learners in each LBS level served by delivery agency	• IMS Data • Community planning report

Performance Indicator	Measurement Tool
Service delivery niche indentified by each agency	• Community planning report • LSP service delivery charts spreadsheets
% of participants who indicate that the community planning process helps to improve service coordination among and between LBS delivery agencies	• Meeting evaluation form • Community planning report evaluation

It was suggested that indicators that involve learners be removed and that we "stick to indicators where we can really have proof that our efforts had a direct impact on the results and the impact."

3. While some felt it wasn't their job to review the literacy service plans (LSP) that networks produce, others saw this as an opportunity to gain more information about the sector or stream they represent. They suggested that the language in the framework be modified to take the focus off the LSP report. For example, in the above table, refer to a community planning report rather than the LSP report – the LSP being just one example of this type of report.

4. Some support organizations had concerns about committing to the long term impacts described in this project. When the outcome or indicator relies on what others (practitioners, for example) will do with the information, some organizations felt it was beyond their scope to monitor or measure this: "we will commit to ensuring that they receive the valid and concrete information or knowledge... we can't guarantee what they do with it on a long term basis".

In Closing – The Next Steps

Are logic models and performance indicators magic bullets? Absolutely not. Is the framework, at this point in time, perfect? Absolutely not.

The logic models have been developed as one way to look at the work that support organizations do for the funding they receive from the Ministry of Training, Colleges and Universities. The framework should be seen as an opportunity to describe to MTCU what it is you do, given a certain set of circumstances (the service functions) and based on a set of assumptions about way things unfold in the literacy field in Ontario at this point in time. If you work with the framework, then you should be able to make the case for what you do.

Without a doubt organizational life is never as clear cut as an "if-then" statement or relationship suggests. There are many interconnected and overlapping correlations between what you do and what happens as a result. Powell-Taylor and others have noted that one of the limitations of logic models is the "necessity of communicating on paper in a two-dimensional space" what can be multi-dimensional issues or problems.

As has been stated throughout this document, the logic models and performance indicators were created as a *living draft* framework. Each logic model was reviewed by the advisory team and each one was determined to be a reasonable "picture" of each service function. The expectation is that support organizations will now tailor the logic models to be a best fit for the work that they do.

Logic Models & Performance Indicators: LIVING DRAFTS

Service Function #1

Service Function #2

Service Function #3

Service Function #4
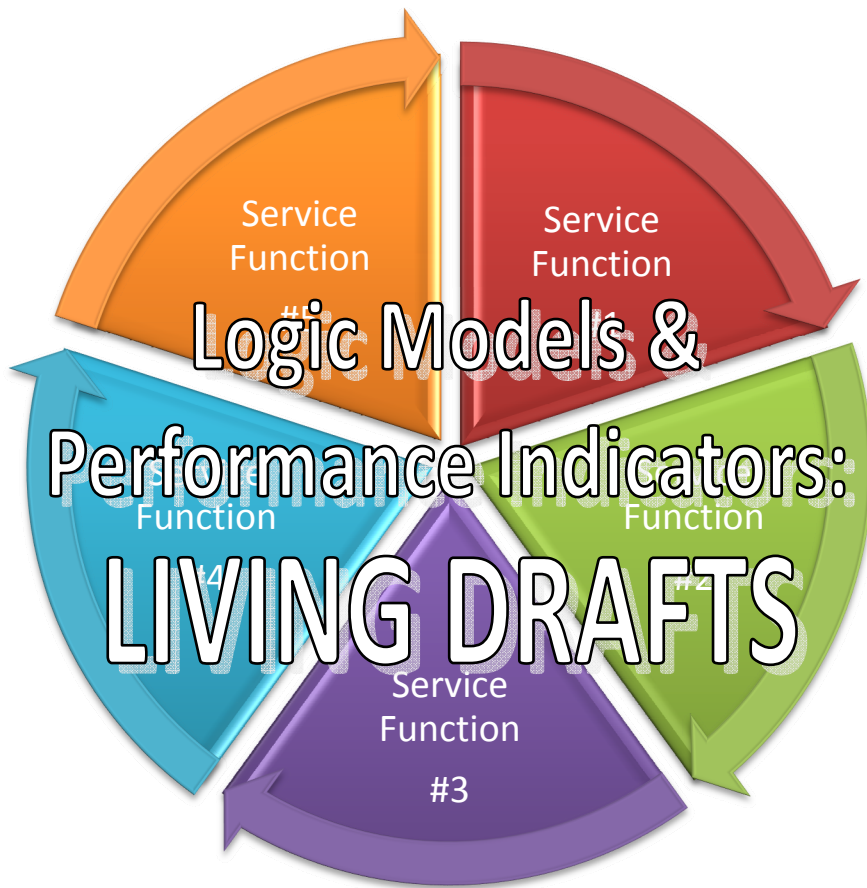
Service Function #5

TABLE 1: Service Function #1 Assumptions

Service Function Description: Support LBS funded delivery agencies to deliver coordinated, quality services responsive to emerging needs (identified by the community and government) within an integrated training and employment system.

Coordinated services, responsive to emerging needs, includes all or some of the following types of activities:

- ➲ Community planning
- ➲ Outreach
- ➲ Networking

Community Planning - Assumptions

The support organization is committed to participating in and coordinating a planning process for the literacy community.

1. Community planning takes place as a result of a consultative and collaborative process with service providers from all LBS-funded agencies (regardless of sector and/or stream) and with other local service providers and organizations.

   - ➲ Community planning includes Literacy Services Planning meetings and other methods used to collect and analyze information from member organizations (LBS and non-LBS). For example, a provincial organization could use its board members as a focus group to collect information. An annual survey of member needs/priority issues could also be called community planning.

   - ➲ The "report" from the community planning process could include newsletters or other documents that summarize the results of data collection. For regional networks the report would be the Literacy Services Planning (LSP) report that is required by MTCU based on annual guidelines set by MTCU. Provincial umbrella and sector organizations can also use the LSP reports to extract data about the needs of the organizations in the niche they serve.

2. Regional support organizations take on the responsibility for coordinating and producing the annual local literacy service plan (LSP).

3. Provincial umbrella and sector organizations take on the responsibility of reviewing and analyzing LSP reports so they can contribute to the development of an integrated and coordinated training and employment system by supporting their member agencies based on indentified priorities and initiatives.

4. Using IMS data, and other data, the service planning report identifies how LBS-funded service providers are meeting current needs

5. Using data from a variety of sources, including IMS reports, reports from local boards, labour market information and information from other service providers inside and outside the EO system, the service planning report indentifies a plan for meeting emerging needs

6. A formalized planning structure allows for more information to be shared widely (with LBS and non-LBS audiences and with audiences outside the EO system).

7. A coordinated and common planning practice amongst/between LBS funded programs will ensure an integrated training and employment system across the province.

8. All LBS funded delivery organizations and other key stakeholders inside and outside the EO system participate in the community planning process in a manner and to a degree that is appropriate to both the issue and the participant.

9. Regional support organizations actively participate in the annual Trends, Opportunities and Priorities process led by a Local Board

Outreach - Assumptions
The support organization is committed to providing the community in general (including potential learners), the literacy community in particular (practitioners, learners and volunteers), employers and the media, with information about available services, programs and resources. A variety of methods are used to provide information.

1. Accurate information about services is created and maintained, and information is provided to the community at larger by a variety of methods.

2. Adequate funding is provided to maintain and update information about of services.

3. Outreach is provided in a variety of accessible and effective ways. These could include toll-free phone numbers, directories, advertisements and/or web-based information.

4. Organizations referring potential learners to programs use a learner-centred process that puts the needs, preferences and goals of each individual at the forefront.

5. Learner referrals are made without preference to appropriate service delivery agencies.

6. Within a region or across regions, a collaborative approach is used for any information and referral processes.

Networking – Assumptions

Networking is about relationship building between LBS and non-LBS agencies and within the LBS field. The support organization is committed to working cooperatively and collaboratively with LBS delivery agencies, other support organizations, other EO agencies and TCU departments, other education and training organizations, social service organizations, funders and employers.

1. Staff from service support organization provide opportunities for key contacts to gain knowledge and information about LBS programs and service.

2. Staff from service support organizations participate in a variety of networking opportunities with key contacts.

3. Support organizations are viewed by other EO agencies and departments, and others, as sources of information and support for literacy and essential skills development.

TABLE 2: Service Function #1 Logic Model

Service Function Description: Support LBS funded delivery agencies to deliver coordinated, quality services responsive to emerging needs (identified by the community and government) within an integrated training and employment system.

COMMUNITY PLANNING

Inputs	Outputs		Outcomes
	Activities	Results	Immediate, Intermediate & Impact

1. Labour Market and/or other data
 	
2. Funding for
  ➕ Community planning process
  ➕ Information dissemination
 	
3. Evaluation Tools
 	
4. Participants:
  ➕ LBS staff
  ➕ Partners/ key collaborators (Other EO agencies, other service providers, other agencies
	1. Scan/survey of community needs
	
	2. Information sharing between and with LBS agencies
	
	3. Planning meetings scheduled
	
	4. In regional setting, all streams and sectors invited to attend planning meetings
	
	5. In regional setting other key community stakeholders and contacts are invited to participate in LSP
		1. For each support organization, key initiatives are identified and priorities are set
		
		2. At regional level, coordinated literacy services workplans are developed
		
		3. Information in LSP reports are grounded in solid decision making process
		
		4. Actions taken as a result of LSP reports led to improved services for adults
		
		5. Changes in service and/or management processes,
			Immediate (Learning: changes in awareness, knowledge, attitude, opinions, motivation):
			
			1. Opportunities for communication and collaboration between and among LBS agencies are increased
			
			2. Opportunities for communication and collaboration between LBS and non-LBS service providers is increased
			
			3. Service coordination among LBS delivery agencies is improved
			
			Intermediate (Action: changes in behaviours, practices, decision-making, policies)
			
			1. Literacy service delivery agencies and support organizations work together to provide a *coordinated* training and employment system based on indentified community needs

TABLE 2: Service Function #1 Logic Model

Service Function Description: Support LBS funded delivery agencies to deliver coordinated, quality services responsive to emerging needs (identified by the community and government) within an integrated training and employment system.

COMMUNITY PLANNING

Inputs	Outputs		Outcomes
	Activities	**Results**	**Immediate, Intermediate & Impact**
	process 6. Data collected from key constituents 7. Priorities set based on available data and clearly identified process 8. Information sharing 9. Evaluation format and protocols developed 10. Provincial umbrella and sector organizations review and analyze LSP reports	reflect changes in service needs 6. Gaps in service are documented, even if they can't be met 7. Information is disseminated widely (LBS and non-LBS agencies, funders, community stakeholders and others) 8. Provincial umbrella and sector organizations indentify their niches in the EO training and employment system	2. Literacy service delivery agencies and support organizations work together to provide a training and employment system that is more *responsive* to indentified community needs **Impact** (Social change: changes in reputation, position, funding, opportunities, learner satisfaction) 1. Better informed decisions by government about funding and policy 2. Support organizations help LBS funded delivery agencies achieve expected results 3. Literacy and essential skills emerge as major issues at other community planning tables.

TABLE 3: Service Function #1 Key Performance Indicators & Measures – Immediate Outcomes		
Community Planning Component		
Immediate Outcomes	**Performance Indicators**	**Measurement Tools**
1. Opportunities for communication and collaboration between and among LBS agencies are increased	# and type of community planning meetings held	• Support organizations annual report • Community planning report
	# of LBS funded agencies invited to participate in community planning process	• Community Planning report
	% of LBS funded agencies that participate in the community planning process	• Meeting minutes • Community planning report
	% of participants who indicate they were satisfied with the opportunity to be part of the community planning process	• Meeting evaluation form
	# of participants who rate the quality of information shared as part of the planning process as high	• Meeting evaluation form
	% of participants who indicated that the quality of information received useful to LBS programs	• Meeting evaluation form

TABLE 3: Service Function #1 Key Performance Indicators & Measures – Immediate Outcomes		
Community Planning Component		
Immediate Outcomes	**Performance Indicators**	**Measurement Tools**
2. Opportunities for communication and collaboration between LBS and non-LBS service providers is increased	# of other service providers invited to participate in community planning process[9]	• Meeting minutes
	% of LBS funded agencies who indicate that is was beneficial to invite other service providers	• Meeting minutes • Meeting evaluation form
	% of non-LBS participants who indicate they were satisfied with the opportunity to participate in the community planning process	• Meeting evaluation form • Community planning report evaluation
	% of participants who indicate information sharing during community planning process was useful	• Meeting evaluation form
	% of participants who rate the quality of the information LBS funded agencies received as high	• Meeting evaluation form
	# of meetings support staff are invited to	• Annual report

---

[9] For provincial umbrella and sector organizations this could include inviting LBS service providers from outside their niche or non-LBS services providers (i.e., Job Connect) to present information at board or annual meetings, training events or to share information electronically.

TABLE 3: Service Function #1 Key Performance Indicators & Measures – Immediate Outcomes		
Community Planning Component		
Immediate Outcomes	**Performance Indicators**	**Measurement Tools**
	attend (outside their niche or non-LBS)	
	% of meetings attended that support staff would rate as valuable for information sharing and exchange	• Event/Meeting self-evaluation form
3. Service coordination among LBS delivery agencies is improved	# of new or revamped partnerships created in response to prioritize needs	• Community planning report • LSP service delivery charts spreadsheets • Newsletters (electronic or paper)
	Information and referral protocols in place	• LSP report • LSP meeting minutes • LBS agency policy and procedures • Support organization policy and procedures
	# of learners served by each agency	• IMS Data • Community planning report
	% of learners in each LBS level served by delivery agency	• IMS Data • Community planning report
	Service delivery niche indentified by each agency	• Community planning report • LSP service delivery charts spreadsheets

TABLE 3: Service Function #1 Key Performance Indicators & Measures – Immediate Outcomes		
Community Planning Component		
Immediate Outcomes	**Performance Indicators**	**Measurement Tools**
	% of participants who indicate that the community planning process helps to improve service coordination among and between LBS delivery agencies	• Meeting evaluation form • Community planning report evaluation
4. Service delivery is more responsive to needs of local labour market and to needs of adults	# of learners served by each delivery agency	• IMS Data • LSP reports
	% of learners in each LBS level served by delivery agency	• IMS Data • LSP Reports
	# of learners with employment as a goal path	• IMS Data • LSP Reports

TABLE 4: Service Function #1 Key Performance Indicators & Measures – Intermediate Outcomes		
Community Planning Component		
Intermediate Outcomes	**Performance Indicators**	**Measurement Tools**
1. Literacy service delivery agencies and support organizations work together to provide a *coordinated* training and employment system based on indentified community needs	All LBS funded agencies participate fully in the community planning process	• Community planning Report
	Stakeholder involvement includes strong representation from the wider community	• Community planning Report
	There are ongoing opportunities for input from a broad range of stakeholders	• Community planning Report
	Planning processes are evaluated at least annually	• Meeting minutes • Meeting evaluation form
	Information in the community planning report provided a clear picture of present and future literacy needs	• Community planning report
	Information in the community planning report provides a clear picture of the range of services provided	• Community planning report
2. Literacy service delivery agencies and support organizations work together to provide a training and employment	Proposed activities are clearly linked to needs indentified	• Community planning report
	Proposed activities are prioritized	• Community planning report

TABLE 4: Service Function #1 Key Performance Indicators & Measures – Intermediate Outcomes		
Community Planning Component		
Intermediate Outcomes	**Performance Indicators**	**Measurement Tools**
system that is more *responsive* to indentified community needs	Process for prioritizing activities is clearly indentified	• Community planning report

TABLE 5: Service Function #1 Key Performance Indicators & Measures – Impact Outcomes		
Community Planning Component		
Impact Outcomes	**Performance Indicators**	**Measurement Tools**
1. Better informed decisions by government about funding and policy	Funding from provincial government is adequate for current and future indentified needs and priorities	• MTCU's annual report • Auditor general's report • Support organizations' annual reports • LSP reports
2. Support organizations help LBS funded delivery agencies achieve expected results	# of learner's achieving goals on exit % of learners who move onto employment or further education on exit # of learners served by LBS funded agencies meet provincial targets	• IMS Data • Learner exit surveys • Support organization's annual report • Delivery agency's annual report
3. Literacy and essential skills emerge as major issues at other community planning tables	# of requests for information about LBS programs and services from non-LBS agencies/service providers and/or other education and training providers % of requests that led to the establishment of new partnerships or program % of requests that require support organization to make a presentation at a meeting	• Information and referral data • Program evaluation data • Annual reports

TABLE 5: Service Function #1 Key Performance Indicators & Measures – Impact Outcomes		
Community Planning Component		
Impact Outcomes	**Performance Indicators**	**Measurement Tools**
	% of requests that ask for copies of outreach/marketing materials	

TABLE 6: Service Function #1 Logic Model

Service Function Description: Support LBS funded delivery agencies to deliver coordinated, quality services responsive to emerging needs (identified by the community and government) within an integrated training and employment system.

OUTREACH

Inputs	Outputs		Outcomes
	Activities	**Results**	**Immediate, Intermediate & Impact**

1. Funding to
  ➥ Develop and maintain outreach materials
  ➥ Maintain websites
 	
2. Evaluation Tools (user stats, feedback)
 	
3. Participants:
  ➥ LBS funded agencies
  ➥ Partners/key collaborators (other EO agencies, other service providers,
	1. Data collection (emails, meetings, focus groups, questionnaires, community consultations)
	
	2. Key initiatives identified and prioritized
	
	3. Promotional materials developed in a variety of formats (printed, online, multimedia)
	
	4. Website updated on a regular basis
		1. Key literacy and essential skills initiatives are promoted to:
		  ➥ General community
		  ➥ Potential learners
		  ➥ Employers
		  ➥ Media
		  ➥ EO/LBS service delivery agencies
		  ➥ Government departments and agencies
		
		2. Delivery services available in a region clearly identified
			Immediate (Learning: changes in awareness, knowledge, attitude, opinions, motivation):
			1. Communication about and marketing of LBS services is responsive to community needs and demographics
			
			2. EO and other community partners have increased understanding of LBS service delivery options for adult learners
			
			3. Service coordination among LBS delivery agencies becomes more effective
			
			4. Potential learners have the information they need to make informed decisions about education and training options

TABLE 6: Service Function #1 Logic Model

Service Function Description: Support LBS funded delivery agencies to deliver coordinated, quality services responsive to emerging needs (identified by the community and government) within an integrated training and employment system.

OUTREACH

Inputs	Outputs		Outcomes
	Activities	**Results**	**Immediate, Intermediate & Impact**
other agencies)	5. At regional level, database of local programs created, maintained and shared 6. Information sharing during regularly scheduled meetings (board, LSP, networking) 7. Promotional materials distributed in a variety of ways (website, e-bulletins, newsletters, presentations) 8. Referral protocols set and reviewed by key	3. General community members and potential learners have access to up-to-date information in a variety of formats 4. LBS agencies, other EO service providers and other service providers have access to up-to-date information in a variety of formats	**Intermediate** (Action: changes in behaviours, practices, decision-making, policies) 1. Number of learners contacting service delivery agencies is increased **Impact** (Social change: changes in reputation, position, funding, opportunities, learner satisfaction) 1. Better informed decisions by government about funding and policy 2. For the general public, literacy and essentials skills for workplace, home and community are major issues. 3. Support organizations help LBS funded delivery agencies achieve expected results

TABLE 6: Service Function #1 Logic Model

Service Function Description: Support LBS funded delivery agencies to deliver coordinated, quality services responsive to emerging needs (identified by the community and government) within an integrated training and employment system.

OUTREACH

Inputs	Outputs		Outcomes
	Activities	**Results**	**Immediate, Intermediate & Impact**
	community collaborators 9. Referral data analyzed annually 10. Evaluation format and protocols developed		4. Non LBS agencies consistently record/note literacy and essential skills needs of clients and make appropriate referrals

TABLE 7: Service Function #1 Key Performance Indicators & Measures – Immediate Outcomes		
Outreach Component		
Immediate Outcomes	**Performance Indicators**	**Measurement Tools**
1. Communication about and marketing of LBS services is responsive to community needs and demographics	# of information and referral inquires that match target markets identified in marketing and outreach materials	• Analysis of marketing materials • Information and referral reports
2. EO and other community partners have increased understanding of LBS service delivery options for adult learners	% of EO and other community members who indicate they have an increased understanding of service delivery options	• Community planning report • Community planning report evaluation
3. Service coordination among LBS delivery agencies becomes more effective	# of new or revamped partnerships created in response to prioritize needs	• Community planning report • LSP service delivery charts spreadsheets • Newsletters (electronic or paper)
	Information and referral protocols in place	• LSP report • LSP meeting minutes • LBS agency policy and procedures • Support organization policy and procedures
	# of learners served by each agency	• IMS Data • Community planning report

TABLE 7: Service Function #1 Key Performance Indicators & Measures – Immediate Outcomes		
Outreach Component		
Immediate Outcomes	**Performance Indicators**	**Measurement Tools**
	% of learners in each LBS level served by delivery agency	• IMS Data • Community planning report
	Service delivery niche indentified by each agency	• Community planning report • LSP service delivery charts spreadsheets
	% of participants who indicate that the community planning process helps to improve service coordination among and between LBS delivery agencies	• Meeting evaluation form • Community planning report evaluation
4. Potential learners have the information they need to make informed decisions about education and training options	# of new learners in each service delivery agency % of new learners who identify outreach materials as their source of information about a literacy program	• IMS Data

TABLE 8: Service Function #1 Key Performance Indicators & Measures – Intermediate Outcomes		
Outreach Component		
Intermediate Outcomes	**Performance Indicator**	**Measurement Tools**
1. Number of learners contacting service delivery agencies is increased	# of new learners in each delivery agency	• IMS data • LSP report

TABLE 9: Service Function #1 Key Performance Indicators & Measures – Impact Outcomes		
Outreach Component		
Impact Outcomes	**Performance Indicators**	**Measurement Tools**
1. Better informed decisions by government about funding and policy	Funding from provincial government is adequate for current and future indentified needs and priorities	• MTCU's annual report • Auditor general's report • Support organizations' annual reports • LSP reports
2. For the general public, literacy and essentials skills for workplace, home and community are major issues	# of people who contact support organizations looking for information on literacy and essential skills # of times stories on literacy appear in the media	• Information and referral data • Support organization's annual report • Delivery agency's annual report
3. Support organizations help LBS funded delivery agencies achieve expected results	# of learner's achieving goals on exit % of learners who move onto employment or further education on exit # of learners served by LBS funded agencies meet provincial targets	• IMS Data • Learner exit surveys • Support organization's annual report • Delivery agency's annual report
4. Non LBS agencies consistently record/note literacy and essential skills needs of clients and make appropriate referrals	# of requests for information about LBS programs and services from non-LBS agencies/service providers and/or other education and training providers	• Information and referral data • Annual reports

TABLE 10: Service Function #1 Logic Model

Service Function Description: Support LBS funded delivery agencies to deliver coordinated, quality services responsive to emerging needs (identified by the community and government) within an integrated training and employment system.

NETWORKING

Inputs	Outputs		Outcomes
	Activities	**Results**	**Immediate, Intermediate & Impact**
1. Participants: ⮑ LBS staff ⮑ Partners/ key collaborators (Other EO agencies, other service providers, other agencies) 2. Evaluation Tools	1. Information sharing between and with LBS agencies 2. Information sharing with employers and other key community contacts 3. Information sessions scheduled 4. Meeting evaluation format and protocols developed	1. Key messages communicated 2. Key priorities understood by all partners and key collaborators 3. Employers and other key community contacts received information about literacy and essential skills training	**Immediate** (Learning: changes in awareness, knowledge, attitude, opinions, motivation): 1. EO and other community partners have increased understanding of LBS service delivery options for adult learners 2. Service support organizations and LBS service delivery agencies increase their understanding community partners' key issues **Intermediate** (Action: changes in behaviours, practices, decision-making, policies) 1. The decision making process is based on accurate information about specific issues and needs of community partners (LBS and non-LBS)

TABLE 10: Service Function #1 Logic Model

Service Function Description: Support LBS funded delivery agencies to deliver coordinated, quality services responsive to emerging needs (identified by the community and government) within an integrated training and employment system.

NETWORKING

Inputs	Outputs		Outcomes
	Activities	**Results**	**Immediate, Intermediate & Impact**
			2. Key community contacts make more informed referral decisions
			3. Support organizations ability to build and maintain strong relationships in the community is increased
			Impact (Social change: changes in reputation, position, funding, opportunities, learner satisfaction)
			1. Support organizations help LBS funded delivery agencies achieve expected results
			2. Literacy and essential skills emerge as major issues at other community planning tables

TABLE 11: Service Function #1 Key Performance Indicators & Measures – Immediate Outcomes		
Networking Component		
Immediate Outcomes	**Performance Indicators**	**Measurement Tools**
1. EO and other community partners have increased understanding of LBS service delivery options for adult learners	% of EO and other community funders who indicate they have an increased understanding of service delivery options	• Community planning report • Community planning report evaluation
2. Service support organizations and LBS service delivery agencies increase their understanding community partners' key issues	# of new or revamped partnerships created in response to identified needs	• LSP service delivery charts spreadsheets • Newsletters (electronic or paper) • Community planning report
	% of meetings attended that support staff would rate as valuable for information sharing and exchange	• Event/Meeting self-evaluation form

TABLE 12: Service Function #1 Key Performance Indicators & Measures – Intermediate Outcomes		
Networking Component		
Intermediate Outcomes	**Performance Indicators**	**Measurement Tools**
1. The decision making process is based on accurate information about specific issues and needs of community partners (LBS and non-LBS)	# of reports/websites consulted # of people interviewed or contacted to gain information	• Community planning report bibliography
2. Key community contacts make more informed referral decisions	# of presentations given to non-LBS agencies and staff	• Organization's Annual report • Board meeting minutes
	% of EO and other community members who indicate they have an increased understanding of service delivery options	• Community planning report evaluation
	# of referral from EO and other community stakeholders	• Information and referral report
3. Support organization's ability to build and maintain strong relationships in the community is increased	# of new or revamped partnerships that participants rate as successful	• Program evaluation data • Newsletters (electronic or paper) • Community planning report
	% of meetings attended that support staff would rate as valuable for information sharing and exchange	• Event/Meeting self-evaluation form

TABLE 13: Service Function #1 Key Performance Indicators & Measures – Impact Outcomes		
Networking Component		
Impact Outcomes	**Performance Indicators**	**Measurement Tools**
1. Literacy and essential skills emerge as major issues at other community planning tables	# of requests for information about LBS programs and services from non-LBS agencies/service providers and/or other education and training providers # of requests for information about LBS programs and services from employers % of requests that led to the establishment of new partnerships or program % of requests that require support organization to make a presentation at a meeting % of requests that ask for copies of outreach/marketing materials	• Information and referral data • Program Evaluation data • Annual reports
2. Support organization's capacity to help LBS funded delivery agencies achieve expected results is increased	# of learner's achieving goals on exit % of learners who move onto employment or further education on exit # of learners served by LBS funded agencies meet provincial targets	• IMS Data • Learner exit surveys • Support organization's annual report • Delivery agency's annual report

TABLE 14: Service Function # 2 Assumptions

Service Function Description: Provide support for ministry led initiatives using a model of continuous improvement

The support organization is committed to enhancing the field's ability to provide quality service delivery to adult learners.

1. MTCU initiatives/priorities are indentified through an internal planning process that reflect larger TCU planning and directions; they are communicated to support organizations through the annual business plan development and by special communications to the field

2. MTCU's rationale for an initiative or priority area is described in a clear uniform manner to all service support organizations

3. MTCU provides sufficient resources (monetary and human) to allow for implementation of initiatives (new and/or ongoing) across regions, sectors and/or streams

4. Support organizations have limited ability to control the roll out of TCU initiatives/priorities

5. Support organizations engage in the process of providing information about and/or training for TCU initiatives/priorities in a positive and supportive manner

6. Support activities relating to a specific initiative or priority area are developed based on information available at a particular point in time

TABLE 15: Service Function #2 Logic Model

Service Function Description: Provide support for ministry led initiatives using a model of continuous improvement

Inputs	Outputs		Outcomes
	Activities	Results	Immediate, Intermediate & Impact
1. Staff (support orgs) 2. Participants (service delivery agencies) 3. Community partners 4. MTCU field consultants 5. Research - environmental scan 6. Resources (materials, funding, information) 7. Evaluation tools and protocol	1. Scan/survey of agencies conducted to determine current level of service or knowledge with regard to current TCU initiatives and priority areas 2. Data analysis conducted to identify best approach to specific initiatives &/or priority areas for agency &/or sector 3. Data analysis determines opportunities to build and maintain	1. For each support organization, approaches to key initiatives/priorities are identified and priorities are set 2. LBS agencies receive information, training and support they need to improve their capacity to deliver effective and efficient programs 3. Opportunities for partnering/collaboration provided and acted upon 4. Role of support	**Immediate** (Learning: changes in awareness, knowledge, attitude, opinions, motivation): 1. Opportunities for partnerships and collaboration between and among LBS support organizations are increased 2. Support organizations' abilities to help LBS funded agencies understand initiatives/priorities is increased 3. Support organizations and delivery agencies have an increased understanding of their role in ministry led initiatives 4. Data collection and analysis contributes to an increase in continuous improvement for both support organizations and delivery agencies **Intermediate** (Action: changes in behaviours, practices, decision-making, policies) 1. Service delivery is more responsive to needs

TABLE 15: Service Function #2 Logic Model			
Service Function Description: Provide support for ministry led initiatives using a model of continuous improvement			
Inputs	**Outputs**		**Outcomes**
	Activities	**Results**	**Immediate, Intermediate & Impact**
	partnerships/ opportunities for collaboration 4. Information /reports given to TCU (and others as needed) 5. Action plan for changing/improving current situation and for monitoring results created 6. Core activities undertaken 7. Information distributed 8. Evaluation format and protocols developed	organization in EO framework strengthened 5. Support organization's ability to provide service to delivery agencies is documented 6. Information about specific initiatives is integrated into marketing tools, program design and delivery, program management and/or program evaluation 7. Support organizations provide TCU with up-to-date feedback about the roll out of TCU	of local labour market and to needs of adults 2. Literacy service delivery agencies and support organizations work together to provide a *coordinated* training and employment system based on indentified community needs 3. Literacy service delivery agencies and support organizations work together to provide a training and employment system that is more *responsive* to indentified community needs **Impact** (Social change: changes in reputation, position, funding, opportunities, learner satisfaction) 1. Better informed decisions by government about funding and policy

TABLE 15: Service Function #2 Logic Model

Service Function Description: Provide support for ministry led initiatives using a model of continuous improvement

Inputs	Outputs		Outcomes
	Activities	Results	Immediate, Intermediate & Impact
		initiatives/priorities	2. Support organizations help LBS funded delivery agencies achieve expected results 3. The literacy and essential skills field provides effective and efficient service to adults that is responsive to and part of an integrated education and training system

TABLE 16: Service Function #2 Key Performance Indicators & Measures – Immediate Outcomes

Service Function Description: Provide support for ministry led initiatives using a model of continuous improvement

Immediate Outcomes	Performance Indicators	Measurement Tools
1. Opportunities for partnerships and collaboration between and among LBS support organizations are increased	Business plan reflects logical approach to priorities based on consultation and collaboration with pertinent stakeholders	• Organization's Business plan
	Process for prioritizing TCU initiatives/priorities clearly articulated and documented	• Organization's Business Plan
2. Support organizations' abilities to help LBS funded agencies understand initiatives/priorities is increased	Business plan reflects logical approach to priorities based on consultation and collaboration with pertinent stakeholders	• Organization's Business plan
	Process for prioritizing TCU initiatives/priorities clearly articulated and documented	• Organization's Business Plan • LSP meeting minutes
3. Support organizations and delivery agencies have an increased understanding of their role in ministry led initiatives	Information, training and support LBS agencies receive allows them to improve their capacity to deliver effective and efficient programs	• Practitioner/Program Survey (annual/semi annual)

TABLE 16: Service Function #2 Key Performance Indicators & Measures – Immediate Outcomes		
Service Function Description: Provide support for ministry led initiatives using a model of continuous improvement		
Immediate Outcomes	**Performance Indicators**	**Measurement Tools**
4. Data collection and analysis contributes to an increase in continuous improvement for both support organizations and delivery agencies	Improvement documented in program monitoring report Funder statistical targets achieved	• Funder monitoring and evaluation report • Funder's annual report to Minister

TABLE 17: Service Function #2 Key Performance Indicators & Measures – Intermediate Outcomes

Service Function Description: Provide support for ministry led initiatives using a model of continuous improvement

Intermediate Outcomes	Performance Indicators	Measurement Tools
1. Service delivery is more responsive to needs of local labour market and to needs of adults	# of collaborations with other EO Agencies	• Organization's Annual report
	Information in the community planning report provides a clear picture of present and future literacy needs	• Community planning report
	Information in the community planning report provides a c clear pictures of the range of services available from service delivery and service support organizations	
2. Literacy service delivery agencies and support organizations work together to provide a *coordinated* training and employment system based on TCU initiatives/priorities	# and type of partnerships between support organizations	• Practitioner/Program Survey (annual/semi annual)
	# and type of partnerships between delivery agencies	• Practitioner/Program Survey (annual/semi annual)
	# of partnerships brokered with employers	• Practitioner/Program Survey (annual/semi annual)

TABLE 17: Service Function #2 Key Performance Indicators & Measures – Intermediate Outcomes		
Service Function Description: Provide support for ministry led initiatives using a model of continuous improvement		
Intermediate Outcomes	**Performance Indicators**	**Measurement Tools**
	% of practitioners who report making changes to program management	• Practitioner/Program Survey (annual/semi-annual) • Resource evaluation
	% of practitioners who report making changes to program design and/or delivery	• Practitioner/Program Survey (annual/semi-annual) • Resource evaluation
3. Literacy service delivery agencies and support organizations work together to provide a training and employment system that is more *responsive* to TCU initiatives/priorities	#of people who contact the organization looking for information about an initiative	• Agency database • LSP report
	# of hits on a webpage & # of times specific information or documents are downloaded	• Website data analysis (monthly)
	# and type of partnerships between LBS programs and other EO agencies # and type of partnerships between LBS support organizations and other EO agencies	• Community Planning Report • Program monitoring and report form • Organization's Annual report

TABLE 18: Service Function #2 Key Performance Indicators & Measures – Impact Outcomes

Service Function Description: Provide support for ministry led initiatives using a model of continuous improvement

Impact Outcomes	Performance Indicators	Measurement Tools
1. Better informed decisions by government about funding and policy	# of times LBS program statistics are used in TCU reports	• MTCU's annual report
	Funding from provincial government is adequate for current and future identified needs and priorities	• MTCU's annual report • Auditor general's report • Support organizations' annual reports • LSP reports
2. Support organizations help LBS funded delivery agencies achieve expected results	# of learners by region or sector who successfully exit programs provided by LBS delivery agencies	• IMS data • LSP Report
	# of learners who report they are satisfied with the service they received while participating in programs and services offered by the LBS agency	• Learner satisfaction survey • Learner exit survey • LSP Report
	# of learners served by LBS funded agencies meet provincial targets	• IMS Data • Learner exit surveys • Support organization's annual report • TCU Program monitoring and evaluation report

TABLE 18: Service Function #2 Key Performance Indicators & Measures – Impact Outcomes Service Function Description: Provide support for ministry led initiatives using a model of continuous improvement		
Impact Outcomes	**Performance Indicators**	**Measurement Tools**
3. The literacy and essential skills field provides effective and efficient service to adults that is responsive to and part of an integrated education and training system	Improvements are documented in program monitoring report TCU statistical targets achieved	• TCU Program monitoring and evaluation report • Funder's annual report to minister

TABLE 19: Service Function # 3 Assumptions

Service Function Description: Develop and provide accessible, quality resources that support LBS-funded agencies to deliver a quality LBS program

The support organization is committed to enhancing the field's ability to provide quality service delivery to adult learners through the development and refinement of resources:

1. Resources are defined as print or web-based materials including (but not limited to): tools, such as referral protocols, best practices or common/shared approaches that enhance LBS service delivery; research; information bulletins, etc.

2. Resource development is undertaken as a result of consultation with the delivery agencies served by the support organization and in consultation with MTCU field consultants and/or consultation with staff from other TCU departments

3. MTCU provides sufficient resources (monetary and human) to allow for the development and provision of quality resources across regions, sectors and/or streams

4. For resource development that is not supported by MTCU, the service support organization, in consultation with its staff, members agencies or the community at large, may seek funding from other sources

5. Staff from support organizations may participate in resource development that is not supported by MTCU (federal projects &/or projects undertaken by other provinces) as a way to add value to the field in Ontario

TABLE 20: Service Function #3 Logic Model

Service Function Description: Develop and provide accessible, quality resources that support LBS-funded agencies to deliver a quality LBS program

Inputs	Outputs		Outcomes
	Activities	**Results**	**Immediate, Intermediate & Impact**
1. Staff (support orgs) 2. Participants (service delivery agencies) 3. Community partners 4. MTCU field consultants 5. Research – needs assessment 6. Resources (materials, funding, information) 7. Evaluation tools and protocols	1. Scan/survey of agencies conducted to determine current needs with regard to resource development 2. Consultation with stakeholders to identify best approach for resource development and/or sharing 3. Partnerships developed, as needed 4. Resources created and distributed (printed and/or web-based)	1. Resource development occurs as a result of consultation and collaboration 2. For each support organization, resource development priorities are identified and set 3. LBS agencies receive information, training and support they need to improve their capacity to deliver effective and efficient programs 4. Opportunities for partnering/collaboratio	**Immediate** (Learning: changes in awareness, knowledge, attitude, opinions, motivation): 1. LBS delivery agencies will have an increased understanding of key topics/issues 2. Support organization's capacity to support LBS delivery agencies is increased 3. LBS delivery agencies' capacity to support LBS learners is increased 4. Opportunities for partnerships and collaboration between and among LBS support organizations are increased 5. Resource development contributes to an increase in continuous improvement for both support organizations and delivery agencies

TABLE 20: Service Function #3 Logic Model

Service Function Description: Develop and provide accessible, quality resources that support LBS-funded agencies to deliver a quality LBS program

Inputs	Outputs		Outcomes
	Activities	**Results**	**Immediate, Intermediate & Impact**
	5. Piloting activities conducted or supported, as needed 6. Resources supported by appropriate venue(s): ➲ Workshop development ➲ Workshop delivery ➲ Information bulletins ➲ Discussion and LSP and/ or other meetings 7. Directory of current in-house resources developed and maintained	n provided and acted upon 5. Key products/tools are distributed to LBS agencies and other EO agencies and others as required 6. Support organization's ability to provide service to delivery agencies is documented 7. Staff from support organizations gain skills and knowledge from participating in projects from other provinces or with a national scope	**Intermediate** (Action: changes in behaviours, practices, decision-making, policies) 1. Support organization's ability to work within the EO system is increased 2. Literacy service delivery agencies and support organizations work together to provide a *coordinated* training and employment system based on indentified community needs 3. Literacy service delivery agencies and support organizations work together to provide a training and employment system that is more *responsive* to indentified community needs 4. Within the literacy and essential skills field, skills and knowledge of practitioners is increased.

TABLE 20: Service Function #3 Logic Model

Service Function Description: Develop and provide accessible, quality resources that support LBS-funded agencies to deliver a quality LBS program

Inputs	Outputs		Outcomes
	Activities	**Results**	**Immediate, Intermediate & Impact**
	8. Networking with other support organizations and/or key projects 9. Participation in projects with a national focus 10. Communication/ information sharing plan developed and used 11. Evaluation format and protocols developed	8. Information about specific initiatives is integrated into marketing tools, program design and delivery, program management and/or program evaluation	**Impact** (Social change: changes in reputation, position, funding, opportunities, learner satisfaction) 1. Support organizations help LBS funded delivery agencies achieve expected results 2. The literacy and essential skills field provides effective and efficient service that is responsive to and part of an integrated education and training system

TABLE 21: Service Function #3 Key Performance Indicators & Measures – Immediate Outcomes

Service Function Description: Develop and provide accessible, quality resources that support LBS-funded agencies to deliver a quality LBS program

Immediate Outcomes	Performance Indicators	Measurement Tools
1. LBS delivery agencies will have an increased understanding of key topics/issues	# of LBS practitioners consulted during resource development # of LBS agencies that acknowledge receipt of resources # of training and/or information sessions held % of LBS practitioners who attend training and/or information sessions (by region and/or sector) % of practitioners who report an increase in knowledge of specific topic/issue	• Needs assessment survey • Pre & post training evaluation • Information/Event survey • Resource evaluation
2. Support organization's capacity to support LBS delivery agencies is increased	% of practitioners who report using information from a specific resource	• Resource evaluation
	# of resources distribute by hard copy and/or Internet	• Agency annual Report • Sales/distribution records • Website data analysis (monthly)

TABLE 21: Service Function #3 Key Performance Indicators & Measures – Immediate Outcomes

Service Function Description: Develop and provide accessible, quality resources that support LBS-funded agencies to deliver a quality LBS program

Immediate Outcomes	Performance Indicators	Measurement Tools
3. LBS delivery agencies' capacity to support LBS learners is increased	% of practitioners who report an increase in confidence to teach % of practitioners who report and increase confidence to manage LBS agency	• Needs assessment survey • Pre & post training evaluations • Information/event survey • Resource evaluation
4. Opportunities for partnerships and collaboration between and among LBS support organizations are increased	% of LBS support organizations consulted during resource development	• Resource acknowledgements section
	# of practitioners from outside the region/sector /stream participating in resource development	• Resource acknowledgements section • Project reports
	# of training events or information sessions delivered in partnership with other support organizations	• Agency Annual report • LSP report
5. Resource development contributes to an increase in continuous improvement for both support organizations and	% of learners who report they are satisfied with the service they received while participating in programs and	• Learner Satisfaction Survey

TABLE 21: Service Function #3 Key Performance Indicators & Measures – Immediate Outcomes Service Function Description: Develop and provide accessible, quality resources that support LBS-funded agencies to deliver a quality LBS program		
Immediate Outcomes	**Performance Indicators**	**Measurement Tools**
delivery agencies	services offered by the LBS agency	
	# of practitioners who report using information from a specific resource % of practitioners who report an increase in knowledge of specific topic/issue	• Needs assessment survey • Pre & post training evaluations • Information/Event survey • Resource evaluation

TABLE 22: Service Function #3 Key Performance Indicators & Measures – Intermediate Outcomes		
Service Function Description: Develop and provide accessible, quality resources that support LBS-funded agencies to deliver a quality LBS program		
Intermediate Outcomes	**Performance Indicators**	**Measurement Tools**
1. Support organization's ability to work within the EO system is increased	# of documented communication activities between LBS & EO agencies # and type of resources developed in response to identified needs # and type of resources accessed by LBS agencies	• Minutes of LSP meetings • Minutes of meetings attended by staff from LBS support organizations and/or LBS delivery agencies • Organization's annual report
	% of referrals from LBS to other EO agencies # of learners who indicated at referral or intake being referred by a non LBS agency	• Community Planning meeting minutes • Community planning report
2. Literacy service delivery agencies and support organizations work together to provide a *coordinated* training and employment system based on identified community needs	% of practitioners who report using resources to make changes to program design and/or delivery % of practitioners who report using resources to make changes to program evaluation	• Practitioner/Program Survey (annual/semi-annual) • Resource evaluation

TABLE 22: Service Function #3 Key Performance Indicators & Measures – Intermediate Outcomes Service Function Description: Develop and provide accessible, quality resources that support LBS-funded agencies to deliver a quality LBS program		
Intermediate Outcomes	**Performance Indicators**	**Measurement Tools**
3. Literacy service delivery agencies and support organizations work together to provide a training and employment system that is more *responsive* to identified community needs	% of practitioners who report using resources to make changes to program design and/or delivery % of practitioners who report using resources to make changes to program evaluation	• Practitioner/Program Survey (annual/semi-annual) • Resource evaluation
	# of learners who report they were satisfied with the service they received while participating in programs and services offered by the LBS delivery agency	• Learner exit form • LSP report
4. Within the LBS field, skills and knowledge of practitioners is increased.	% of practitioners who report using skills and knowledge from resource with learners % of practitioners who report using resources with learners % of practitioners who report an increase in confidence when working with adult learners	• Practitioner/Program Survey (annual/semi-annual)

TABLE 23: Service Function #3 Key Performance Indicators & Measures – Impact Outcomes

Service Function Description: Develop and provide accessible, quality resources that support LBS-funded agencies to deliver a quality LBS program

Impact Outcomes	Performance Indicators	Measurement Tools
1. Support organization help LBS funded delivery agencies achieve expected results is increased	# of learner who successfully exit programs provided by LBS delivery agencies # of learners who report they are satisfied with the service they received while participating in programs and services offered by the LBS agency	• Learner satisfaction survey • Learner exit survey • LSP Report
2. The field provides effective and efficient service to adults that is responsive to and part of an integrated education and training system is increased	Improvement documented in program monitoring report Funder statistical targets achieved	• Funder monitoring and evaluation report • Funder's annual report to minister

TABLE 24: Service Function # 4 Assumptions

Service Function Description: Support professional development of LBS-funded agencies to effectively deliver the LBS program

The support organization is committed to providing literacy practitioners with the opportunity to gain skills and knowledge. LBS delivery agencies and support organizations recognize the key role support organizations play in the provision of high quality training for the literacy and essential skills field (instructors, managers, volunteers and others).

1. Professional development activities will be provided in consultation with key stakeholders. This could include practitioners, MTCU, learners, businesses and other education and training providers.

2. All LBS staff members have the opportunity to participate in initial and ongoing training

3. Professional development and training (initial and ongoing) is linked to program evaluation results and the skills development of individual practitioners

4. Practitioners may be charged a fee for workshops (face-to-face or online)

5. A variety of methods will be used to provide the opportunity for practitioners to increase their skills and knowledge:

   ➲ Training - face-to-face, online, self-directed, workshop settings, and other common methods of delivery

   ➲ Information exchange – e-mail, e-bulletins, web-site, telephone, face-to-face meetings

   ➲ Resource-based – sharing of printed materials (hard copy and/or electronic), access to subject matter experts (e.g., via CD-ROMS, pod-casts or other web-based methods, program visits, community planning meetings, special information sessions).

TABLE 25: Service Function #4 Logic Model

Service Function Description: Support professional development of LBS-funded agencies to effectively deliver the LBS program

Inputs	Outputs		Outcomes
	Activities	**Results**	**Immediate, Intermediate & Impact**

1. Market research (topics)
 	
2. Needs Assessment (Organizations &/or individuals)
 	
3. Funding for
  ↻ resource development (PD events online, face-to-face and info sharing)
  ↻ workshop development & delivery
  ↻ training supports
 	
4. Location: Facilities/ equipment
 	
5. Evaluation Tools (pre & post)
	1. Target markets for PD training researched and analyzed
	
	2. PD training strategy developed – initial and ongoing
	
	3. Practitioner skills and knowledge documented
	
	4. PD materials developed (tools, manuals, software, etc)
	
	5. Workshop evaluations (pre & post) developed
		1. Practitioners are trained and/or informed
		
		2. Workshop attendance meets or exceeds target set for participation in terms of overall numbers, targeted sectors and other criteria
		
		3. Feedback from participants indicates a high rate of satisfaction with type of training received
		
		4. practitioners change or modify learning resources and
			Immediate (Learning: changes in awareness, knowledge, attitude, opinions, motivation):
			
			1. Support organization's ability to develop, organize and deliver quality training is enhanced
			
			2. LBS field has practitioners (support organization staff, instructors, program managers and/or volunteers) with increased skills and knowledge
			
			3. Support organization's capacity to support LBS delivery agencies is increased
			
			4. LBS delivery agencies' capacity to support LBS learners is increased
			
			5. Professional development contributes to an increase in continuous improvement for both support organizations and delivery agencies

TABLE 25: Service Function #4 Logic Model

Service Function Description: Support professional development of LBS-funded agencies to effectively deliver the LBS program

Inputs	Outputs		Outcomes
	Activities	**Results**	**Immediate, Intermediate & Impact**
6. Workshop ⮑ design & delivery ⮑ materials ⮑ trainer/facilitator 7. Partners/key collaborators 8. Participants (LBS staff & others, as appropriate)	6. Training sessions held 7. Information disseminated 8. Resource Evaluations developed 9. Feedback analyzed for a variety of factors (e.g., cost, effectiveness, customer satisfaction, etc)	teaching strategies to ensure greater relevance for learners 5. policies and procedures are modified based on use information gained from PD opportunity 6. LBS practitioners are aware of training opportunities 7. Practitioners gain/increase knowledge of specific topic/issue 8. Practitioners gain confidence in ability	**Intermediate** (Action: changes in behaviours, practices, decision-making, policies) 1. Support organization's ability to work within the EO system is increased 2. Literacy service delivery agencies and support organizations work together to provide a *coordinated* training and employment system based on indentified training needs 3. Literacy service delivery agencies and support organizations work together to provide a training and employment system that is more *responsive* to indentified training needs **Impact** (Social change: changes in reputation, position, funding, opportunities, learner satisfaction) 1. Better informed decisions by government

TABLE 25: Service Function #4 Logic Model

Service Function Description: Support professional development of LBS-funded agencies to effectively deliver the LBS program

Inputs	Outputs		Outcomes
	Activities	**Results**	**Immediate, Intermediate & Impact**
		to teach and/or manage LBS programs 9. Practitioners gain/ increase skills for using specific resources	about funding and policy 2. Support organizations help LBS funded delivery agencies achieve expected results 3. The field provides effective and efficient service to adults that is responsive to and part of an integrated education and training system

TABLE 26: Service Function #4 Key Performance Indicators & Measures – Immediate Outcomes

Service Function Description: Support professional development of LBS-funded agencies to effectively deliver the LBS program

Immediate Outcomes	Performance Indicators	Measurement Tools
1. Support organization's ability to develop, organize and deliver quality training is enhanced	# and type of training events held # of training hours provided # of participants attending (online or face-to-face) # of participants who indicate a high level of satisfaction with the training event % of training events that are filled to capacity % of practitioners that attend more than one event offered by the organization	• Pre & post training evaluations • Participant Satisfaction Survey (3 &/or 6 months) (See page 40 for an example) • Event registration forms
2. LBS field has practitioners (support organization staff, instructors, program managers and/or volunteers) with increased skills and knowledge	% of practitioners who report an increase in knowledge of specific topic/issue % of practitioners who report an increase in confidence to teach % of practitioners who report and increase confidence to manage LBS agency	• Needs assessment survey • Pre & post training evaluations • Information/event survey • Resource evaluation

TABLE 26: Service Function #4 Key Performance Indicators & Measures – Immediate Outcomes

Service Function Description: Support professional development of LBS-funded agencies to effectively deliver the LBS program

Immediate Outcomes	Performance Indicators	Measurement Tools
	% of practitioners who report using information from a specific resource/training session % of practitioners who report an increase in awareness of specific topic/ issue % of practitioners who acknowledge an increase in skills and knowledge when completing post training evaluations or information/event surveys	
3. Support organization's capacity to support LBS delivery agencies is increased	% of practitioners who report using information from a specific resource	• Resource evaluation
	% of participants who indicate a high level of satisfaction with the training event	• Pre & post training evaluations • Participant Satisfaction Survey (3 & 6 months)
4. LBS delivery agencies' capacity to support LBS learners is increased	% of practitioners who report an increase in knowledge of specific topic/issue	• Pre & post training evaluations • Participant Satisfaction Survey (3 & 6

TABLE 26: Service Function #4 Key Performance Indicators & Measures – Immediate Outcomes

Service Function Description: Support professional development of LBS-funded agencies to effectively deliver the LBS program

Immediate Outcomes	Performance Indicators	Measurement Tools
	% of practitioners who report an increase in confidence to teach % of practitioners who report and increase confidence to manage LBS agency	months)
	% of learners who report they are satisfied with the service they received while participating in programs and services offered by the LBS agency	• Learner satisfaction surveys • Learner exit interviews
5. Professional development contributes to an increase in continuous improvement for both support organizations and delivery agencies	% of learners who report they are satisfied with the service they received while participating in programs and services offered by the LBS agency	• Learner exit interviews • Learner satisfaction surveys
	Improvement documented in program monitoring report	• Funder monitoring and evaluation report

TABLE 27: Service Function #4 Key Performance Indicators & Measures – Intermediate Outcomes

Support professional development of LBS-funded agencies to effectively deliver the LBS program

Intermediate Outcomes	Performance Indicators	Measurement Tools
1. Support organization's ability to work within the EO system is increased	% of practitioners who acknowledge an increase in skills and knowledge when completing post training evaluations or information/event surveys % of participants who indicate a high level of satisfaction with the training event or information session % of learners who report they are satisfied with the service they received while participating in programs and services offered by the LBS agency Training is relevant to participant regardless of sector or stream	• Pre & post training evaluations • Participant Satisfaction Survey (3 & 6 months)
2. Literacy service delivery agencies and support organizations work together to provide a coordinated training and employment system based on indentified training needs	% of practitioners who report using resources to make changes to program design and/or delivery % of practitioners who report using resources to make changes to program evaluation	• Practitioner/Program Survey (annual/semi-annual) • Resource evaluation • Pre & post training evaluations • Participant Satisfaction Survey (3 & 6 months)

TABLE 27: Service Function #4 Key Performance Indicators & Measures – Intermediate Outcomes Support professional development of LBS-funded agencies to effectively deliver the LBS program		
Intermediate Outcomes	**Performance Indicators**	**Measurement Tools**
	% of practitioners who report using skills and knowledge gained from training event to make changes to program design and/or delivery % of practitioners who report using skills and knowledge gained from training event to make changes to program evaluation	• Practitioner/Program Survey (annual/semi-annual) • Resource evaluation • Pre & post training evaluations • Participant Satisfaction Survey (3 & 6 months)
3. Literacy service delivery agencies and support organizations work together to provide a training and employment system that is more *responsive* to indentified training needs	PD is provided as a result of consultation and collaboration	• Annual report • LSP report
	% of practitioners who report using resources to make changes to program design and/or delivery % of practitioners who report using resources to make changes to program evaluation	• Practitioner/Program Survey (annual/semi-annual) • Resource evaluation
	# of learners who report they were satisfied with the service they received while participating in programs and	• LSP report • Learner exit form

TABLE 27: Service Function #4 Key Performance Indicators & Measures – Intermediate Outcomes Support professional development of LBS-funded agencies to effectively deliver the LBS program		
Intermediate Outcomes	**Performance Indicators**	**Measurement Tools**
	services offered by the LBS delivery agency	
	Funder statistical targets achieved	• Program monitoring and report form • Funder's annual report to minister

TABLE 28: Service Function #4 Key Performance Indicators & Measures – Impact Outcomes

Service Function Description: Support professional development of LBS-funded agencies to effectively deliver the LBS program

Impact Outcomes	Performance Indicators	Measurement Tools
1. Better informed decisions by government about funding and policy	# of times LBS program statistics are used in MTCU reports	• MTCU's annual report
	Funding from provincial government is adequate for current and future indentified needs and priorities	• MTCU's annual report • Auditor general's report • Support organizations' annual reports • LSP reports
2. Support organizations help LBS funded delivery agencies achieve expected results	# of learners who successfully exit programs provided by LBS delivery agencies # of learners who report they are satisfied with the service they received from the LBS agency	• Learner satisfaction survey • Learner exit survey • LSP Report
3. The field provides effective and efficient service to adults that is responsive to and part of an integrated education and training system	Improvements documented in program monitoring report Funder statistical targets achieved	• Funder monitoring and evaluation report • Funder's annual report to minister

TABLE 29: Service Function #5A Assumptions

Service Function Description: Support the production and integration of research and development results and products that are linked to and support the LBS Program.

The support organization is committed to enhancing the field's ability to provide quality service delivery to adult learners through the *production and integration* of research and development results and products:

1. Research and development of resources is undertaken as a result of consultation with the delivery agencies, community members, employers, and others and in consultation with MTCU field consultants.

2. Support organizations collaborate across regions, sectors and streams to produce and develop research and products that are relevant to the current and future needs of LBS funded agencies and organizations.

3. MTCU provides sufficient resources (monetary and human) to allow for the development **and** integration of quality resources across regions, sectors and/or streams**.**

4. For research and development that is not supported by MTCU, the service support organization, in consultation with its staff, members agencies or the community at large, may seek funding from other sources (e.g., federal funding, foundations).

TABLE 30: Service Function #5A Logic Model

Service Function Description: Support the production and integration of research and development results and products that are linked to and support the LBS Program

Inputs	Outputs		Outcomes
	Activities	**Results**	**Immediate, Intermediate & Impact**
1. Staff (support orgs) 2. Participants (service delivery agencies) 3. Community partners (e.g., employers, local training board, other service providers) 4. MTCU field consultants 5. Research – needs assessment 6. Resources (materials, funding, information) 7. Evaluation tools and protocols	1. Relevant projects hosted 2. Primary research conducted 3. Research supported by support organization staff and/or delivery agency staff sitting on advisory committee/ working group 4. Delivery agencies act as pilot or field sites, when appropriate 5. Relevant research information updated on a regular basis 6. Information about final	1. Skills and knowledge of practitioners is developed as a result of active participation in project based initiatives 2. Opportunities for partnering/collaboration provided and acted upon 3. Information about key products/tools are distributed to LBS agencies and other EO agencies and others as required 4. Support organization provides support for the	**Immediate** (Learning: changes in awareness, knowledge, attitude, opinions, motivation): 1. LBS field has practitioners (support organization staff, instructors, program managers and/or volunteers) with increased skills and knowledge 2. Support organization's capacity to support LBS delivery agencies is increased 3. As a result of project work, LBS delivery agencies' capacity to support LBS learners is increased 4. Opportunities for partnerships and collaboration between and among EO and LBS support organizations are increased 5. Participation in research initiatives contributes to an increase in continuous improvement in both support organizations

TABLE 30: Service Function #5A Logic Model

Service Function Description: Support the production and integration of research and development results and products that are linked to and support the LBS Program

Inputs	Outputs		Outcomes
	Activities	**Results**	**Immediate, Intermediate & Impact**
	products (print and web-based) is circulated 7. Networking with other support organizations and/or key projects 8. Communication/ information sharing plan developed and used 9. Practitioners participate in projects with a broader context (e.g., national scope or other sectors) 10. Participation of support organization	integration of new/revised resources into service delivery, as needed 5. Information created as a result of research and development activities is integrated into marketing tools, program design and delivery and/or program evaluation 6. Information created as a result of research and development activities is integrated into databases, resource libraries and marketing	and service delivery agencies **Intermediate** (Action: changes in behaviours, practices, decision-making, policies) 1. Support organization's capacity to work within the EO system is increased 2. In the literacy and essential skills field, the body of knowledge about specific and relevant topics is increased 3. Support organizations capacity to provide effective and efficient service to adults that is *responsive* to and part of an integrated education and training system is increased **Impact** (Social change: changes in reputation, position, funding, opportunities, learner satisfaction) 1. Community partners and other EO agencies understand the role of LBS funded programs

TABLE 30: Service Function #5A Logic Model

Service Function Description: Support the production and integration of research and development results and products that are linked to and support the LBS Program

Inputs	Outputs		Outcomes
	Activities	**Results**	**Immediate, Intermediate & Impact**
	staff and/or delivery agency staff in research evaluated	tools and other information 7. Practitioners gain skills and knowledge	and services in an integrated education and training system 2. Support organizations help LBS funded delivery agencies achieve expected results 3. Better informed decisions by government about funding and policy 4. The field provides effective and efficient service to adults that is responsive to and part of an integrated education and training system

TABLE 31: Service Function #5A Key Performance Indicators & Measures – Immediate Outcomes

Service Function Description: Support the production and integration of research and development results and products that are linked to and support the LBS Program

Immediate Outcomes	Performance Indicators	Measurement Tools
1. LBS field has practitioners (support organization staff, instructors, program managers and/or volunteers) with increased skills and knowledge	% of practitioners who report an increase in knowledge of specific topic/issue % of practitioners who report an increase in confidence to teach % of practitioners who report and increase confidence to manage LBS agency % of practitioners who report using information from a specific resource/training session % of practitioners who report an increase in awareness of specific topic/ issue % of practitioners who acknowledge an increase in skills and knowledge when completing post training evaluations or information/event surveys	• Needs assessment survey • Pre & post training evaluations • Information/event survey • Resource evaluation
2. Support organization's capacity to support LBS delivery agencies is	% of practitioners who report using information from specific research	• Project evaluation

TABLE 31: Service Function #5A Key Performance Indicators & Measures – Immediate Outcomes **Service Function Description: Support the production and integration of research and development results and products that are linked to and support the LBS Program**		
Immediate Outcomes	**Performance Indicators**	**Measurement Tools**
increased	% of participants who indicate a high level of satisfaction with the results of the research	• Project evaluation • Participant Satisfaction Survey (3 & 6 months)
3. As a result of project work, LBS delivery agencies' capacity to support LBS learners is increased	% of practitioners who report an increase in knowledge of specific topic/issue % of practitioners who report an increase in confidence to teach % of practitioners who report and increase confidence to manage LBS agency	• Pre & post training evaluations • Participant Satisfaction Survey (3 & 6 months)
	% of learners who report they are satisfied with the service they received while participating in programs and services offered by the LBS agency	• Learner satisfaction surveys • Learner exit interviews
4. Opportunities for partnerships and collaboration between and among EO and LBS support organizations are increased	% of LBS support organizations consulted during resource development	• Resource acknowledgements section
	# of practitioners from outside the	• Resource acknowledgements section

TABLE 31: Service Function #5A Key Performance Indicators & Measures – Immediate Outcomes

Service Function Description: Support the production and integration of research and development results and products that are linked to and support the LBS Program

Immediate Outcomes	Performance Indicators	Measurement Tools
	region/sector /stream participating in resource development	• Project reports
	# of training events or information sessions delivered in partnership with other support organizations	• Agency Annual report • Community planning report
5. Participation in research initiatives contributes to an increase in continuous improvement in both support organizations and service delivery agencies	% of learners who report they are satisfied with the service they received while participating in programs and services offered by the LBS agency	• Learner Satisfaction Survey
	# of practitioners who report using information from a specific resource % of practitioners who report an increase in knowledge of specific topic/issue	• Needs assessment survey • Pre & post training evaluations • Information/Event survey • Resource evaluation

TABLE 32: Service Function #5A Key Performance Indicators & Measures – Intermediate Outcomes		
Service Function Description: Support the production and integration of research and development results and products that are linked to and support the LBS Program		
Intermediate Outcomes	**Performance Indicators**	**Measurement Tools**
1. Support organization's capacity to work within the EO system is increased	% of practitioners who acknowledge an increase in skills and knowledge when completing post training evaluations or information/event surveys % of participants who indicate a high level of satisfaction with the training event or information session % of learners who report they are satisfied with the service they received while participating in programs and services offered by the LBS agency Training is relevant to participant regardless of sector or stream TCU ac acknowledges the integration of new or revised resources through the annual program audit process	• Pre- & post-training evaluations • Participant Satisfaction Survey (3 & 6 months) • Annual reporting and monitoring
2. In the literacy and essential skills field, the body of knowledge about specific	% of practitioners who report using skills and knowledge from research with	• Practitioner/Program Survey

TABLE 32: Service Function #5A Key Performance Indicators & Measures – Intermediate Outcomes Service Function Description: Support the production and integration of research and development results and products that are linked to and support the LBS Program		
Intermediate Outcomes	**Performance Indicators**	**Measurement Tools**
and relevant topics is increased	learners % of practitioners who report using information or products with learners % of practitioners who report an increase in confidence when working with adult learners	(annual/semi-annual)
3. Support organizations capacity to provide effective and efficient service that is *responsive* to and part of an integrated education and training system is increased	% of practitioners who report using resources to make changes to program design and/or delivery % of practitioners who report using resources to make changes to program evaluation	• Practitioner/Program Survey (annual/semi-annual) • Resource evaluation
	# of learners who report they were satisfied with the service they received while participating in programs and services offered by the LBS delivery agency	• Learner exit form • Community planning report

TABLE 33: Service Function #5A Key Performance Indicators & Measures – Impact Outcomes

Service Function Description: Support the production and integration of research and development results and products that are linked to and support the LBS Program

Impact Outcomes	Performance Indicators	Measurement Tools
1. Community partners and other EO agencies understand the role of LBS funded programs and services in an integrated education and training system	# of requests for information about LBS programs and services from non-LBS agencies/service providers and/or other education and training providers % of requests that led to the establishment of new partnerships or program % of requests that require support organization to make a presentation at a meeting % of requests that ask for copies of outreach/marketing materials	• Information and referral data • Program evaluation data • Annual reports
2. Support organizations help LBS funded delivery agencies achieve expected results	# of learner's achieving goals on exit % of learners who move onto employment or further education on exit # of learners served by LBS funded agencies meet provincial targets	• IMS Data • Learner exit surveys • Support organization's annual report • Delivery agency's annual report

TABLE 33: Service Function #5A Key Performance Indicators & Measures – Impact Outcomes

Service Function Description: Support the production and integration of research and development results and products that are linked to and support the LBS Program

Impact Outcomes	Performance Indicators	Measurement Tools
3. Better informed decisions by government about funding and policy	Funding from provincial government is adequate for current and future indentified needs and priorities	• MTCU's annual report • Auditor general's report • Support organizations' annual reports • Community planning reports
4. The literacy and essential skills field provides effective and efficient service to adults that is responsive to and part of an integrated education and training system	Improvement documented in program monitoring report TCU statistical targets achieved	• TCU Program monitoring and evaluation report • Funder's annual report to minister

TABLE 34: Service Function #5B Assumptions

Service Function Description: Support the production and integration of research and development results and products that are linked to and support the LBS Program. *(Proposed research and development projects).*

The support organization is committed to submitting projects proposals that enhancing the field's ability to provide quality service delivery to adult learners:

1. Project proposals add to the body of knowledge currently in the field.

2. The development of project proposals is undertaken as a result of consultation with the delivery agencies, community members, employers, and others and in consultation with MTCU field consultants.

3. Project proposals provide the opportunity for collaboration, consultation and/or information sharing across and between regions, sectors and streams.

4. Requests for proposals from MTCU clearly outline desired outcomes and funding priorities.

5. In consultation with its staff, member agencies and/or the community at large, service support organizations may submit project proposals not supported by MTCU to other funding bodies.

TABLE 35: Service Function #5B Logic Model

Service Function Description: Support the production and integration of research and development results and products that are linked to and support the LBS Program *(Proposed research and development projects)*

Inputs	Outputs		Outcomes
	Activities	**Results**	**Immediate, Intermediate & Impact**
1. Staff (support orgs) 2. Participants (service delivery agencies) 3. Community partners (e.g., employers, local training board, other service providers) 4. MTCU field consultants 5. Research – needs assessment 6. Resources (materials, funding, information) 7. Evaluation tools and protocols	1. Consultation with LBS agencies (delivery and/or support) and other key stakeholders held 2. Project proposal(s) developed and submitted 3. Information about completed project proposals is shared widely	1. Project proposals developed based on partnering/collaboration with community partners, and/or across regions, sectors and streams 2. Information about submitted proposals is disseminated	**Immediate** (changes in awareness, knowledge, attitude, opinions, motivation): 1. Opportunities for partnerships and collaboration between and among EO and LBS support organizations are increased 2. Opportunities for partnerships and collaboration between LBS support organizations and LBS delivery agencies are increased

5B NOTE: At this time only immediate outcomes have been developed for this part of the service function.

TABLE 36: Service Function #5B Key Performance Indicators & Measures – Immediate Outcomes

Service Function Description: Support the production and integration of research and development results and products that are linked to and support the LBS Program *(Proposed research and development projects)*

Immediate Outcomes	Indicators	Measurement Tools
1. Opportunities for partnerships and collaboration between and among EO and LBS support organizations are increased	% of LBS support organizations consulted during development of project proposal	• Completed project application • Notes from consultations, meetings
	# of practitioners from outside the region/sector /stream consulted during development of project proposal	
	# of staff from outside LBS system consulted during development of project proposal	
	# of proposed training events or information sessions to be delivered in partnership with other support organizations	
2. Opportunities for partnerships and collaboration between LBS support organizations and LBS delivery agencies are increased	# and % of LBS delivery agencies consulted during resource development	• Completed project application • Notes from consultations, meetings
	# of practitioners from outside the region/sector /stream consulted during development of project proposal	

TABLE 36: Service Function #5B Key Performance Indicators & Measures – Immediate Outcomes

Service Function Description: Support the production and integration of research and development results and products that are linked to and support the LBS Program *(Proposed research and development projects)*

Immediate Outcomes	Indicators	Measurement Tools
	# of proposed training events or information sessions to be delivered in partnership with other LBS agencies	
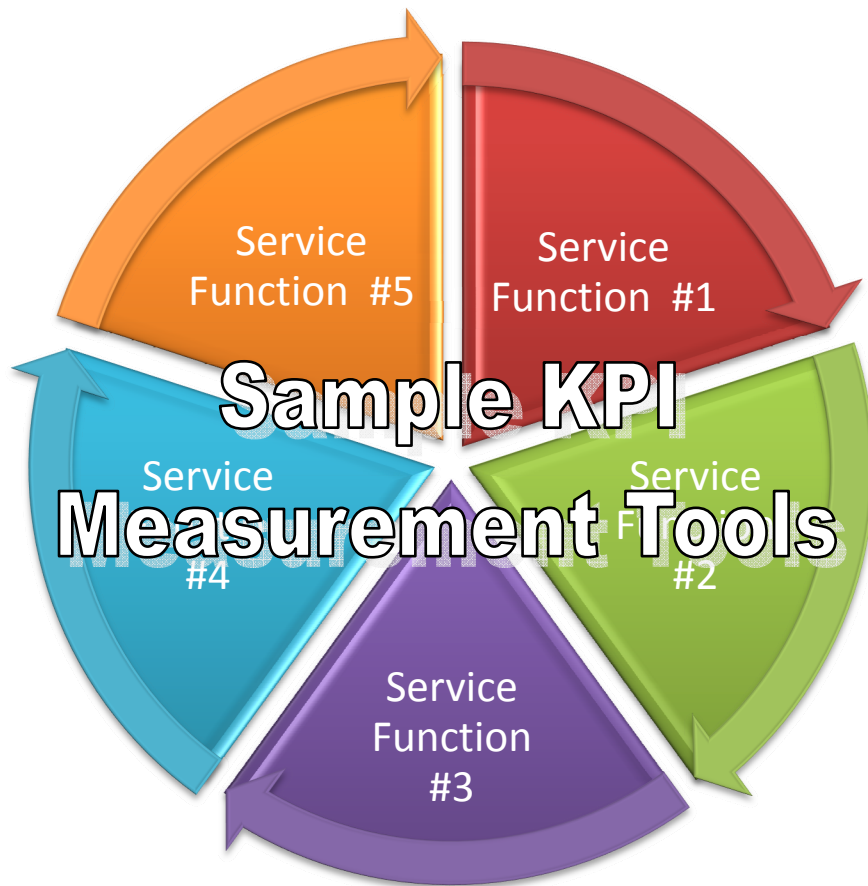
Tools

In this section of the document you will find some samples of the tools mentioned in the performance indicator tables of the logic model. Each sample tool has been provided by a support organization and is used with permission.

You may want to contact the support organization for more information about the tool. Ideally, if you have examples of similar tools you could share them with the other LBS support organizations.

Please note: the format of the tools has been modified to fit the formatting of this document.

SAMPLE BUSINESS PLANNING SURVEY[10]

In its original format, this survey was sent to LBS organizations to gain information about the MTCU priorities for that year, one of which was a focus on essential skills and the Employment Ontario website. Questions such as "Are you familiar with _____" indicates a place where you can insert a key topic area or key question.

[insert Organizational Name Here] Business Planning Survey [insert year here]
1. Please indicate the county and/or municipality in which you work:

2. Did you attend one of the _____ sessions held in 2008?

3. Do you have a better understanding of how your services link with the broader regional training and employment system?

4. Are you planning to strengthen your linkages with other Employment Ontario partners? If so, which services and for what purposes?

5. What can [inset org name here] do to assist you to have a better understanding of Employment Ontario?

6. What can [inset org name here] do to assist you to strengthen your linkages with other Employment Ontario partners?

7. Are you aware of the Employment Ontario web site?

8. Do you use the web site?

9. Is your agency information listed on the web site?

10. Is your agency information listed accurately on the web site?

---

[10] Adapted from *LOCS Business Planning Survey 08-09*. Used with permission.

[insert Organizational Name Here] Business Planning Survey [insert year here]
11. Are you familiar with_____?[Insert name of initiative or program or priority]

12. Does your delivery agency incorporate Essential Skills in delivery? How?

13. What can [inset org name here] do to assist you to better understand and incorporate Essential Skills into delivery? Training/Workshops/Resources

14. Do you or any of your staff require training, support or information about any of the following topics? (check all that apply)			
	training	**support**	**information**
Topic one			
Topic two			
Topic three			
Other topics:			

15. What resources would help you or other staff members learn more about the topics you checked above? (you can list more than one resource number for each topic)
1. Workshops
2. Instructor sharing
3. Inquiry groups
4. Conferences
5. Online discussions (forums, listservs, other web-based methods)
6. Professional journals
7. Visiting classes of colleagues
8. Taking a class at a local college
9. Taking a distance learning class
10. Information sharing sessions

Topic number from question 14.	**Resource number from questions 15.**
Topic	**Resource #**
Topic	**Resource #**
Topic	**Resource #**
Topic	**Resource #**

[insert Organizational Name Here] Business Planning Survey [insert year here]

16. Would you work with [inset org name here] to develop _____ products for LBS?

If so, please select all that apply (from Q 14 and 15 above).

17. Are you familiar with _____?[Insert name of initiative or program or priority]

18. What can _____ do to prepare you to implement _____?

19. Did you complete the _____ survey that was sent out by _____?

20. How effective has _____ been in supporting your agency over the past year?

21. In your opinion, what has _____ done well over the past year?

21. In your opinion, what can _____ do better over the next year?

22. Are there services you would like _____ to start providing to assist you?

SAMPLE WORKSHOP EVALUATION

This is typical pre- and post-workshop evaluation.

WORKSHOP EVALUATION

Workshop Title: _____

Date: _____

Location: _____

This Evaluation form has **2 Sections** – a Pre-Workshop Section 1 and a Post-Workshop Section 2. Fill out Section 1 before the workshop begins and complete Section 2 at the end of the workshop. Thank you!

SECTION 1: Pre Workshop – COMPLETE BEFORE WE BEGIN TODAY!

1. I rate my current understanding of today's workshop subject as:

    1   2   3   4
    low   high

2. I rate my current level of use or familiarity of today's workshop subject as:

    1   2   3   4
    low   high

3. I rate the importance of today's workshop subject to fulfilling my program's core functions as:

    1   2   3   4
    low   high

4. I rate the importance of today's workshop subject towards fulfilling our program's Employment Ontario role as:

    1   2   3   4
    low   high

5. I rate my current ability to meet expectations of MTCU in relations to today's workshop subject as:

    1   2   3   4
    low   high

Complete the other side "Section 2: Post-Workshop" after workshop.

SECTION 2: Post-Workshop COMPLETE BEFORE YOU LEAVE THE WORKSHOP!

6. I rate the increase of my understanding of today's workshop subject as:

      1   2   3   4

      low   high

7. As a result of this workshop, I rate my expected level of use or familiarity of today's workshop subject as:

      1   2   3   4

      low   high

8. As a result of this workshop, I rate my program's increased ability to fulfill our core functions as:

      1   2   3   4

      low   high

9. As result of this workshop, I rate my program's increased ability to fulfill the Employment Ontario role as:

      1   2   3   4

      low   high

10. As a result of this workshop, I rate the improvement in my ability to meet expectations of MTCU as:

      1   2   3   4

      low   high

11. I rate the facilitator's understanding of today's workshop subject as:

      1   2   3   4

      low   high

12. I rate the facilitator's delivery of the workshop:

      1   2   3   4

      low   high

13. I rate the overall quality of the workshop as:

      1   2   3   4

      low   high

14. How could the quality of the workshop be improved? (Please be specific.)

What skills, information or tools that you received in the workshop do you anticipate using in the next 6 months in your work?"

Sample Information/Event Evaluation Report[11]

This document can be used to assess whether or not your participation in an event or meeting has been successful.

[insert name of organization here]
Information Sharing Evaluation

Event	Highlights	Comments	Key Contacts
Title		Value ☐ Attend future meetings ☐ Waste of Resources ☐ Keep on Radar ☐ ☐	
Type			
Responsible Party		Rationale	
Dates		Next Steps	
Staff		Resources	
Location		Notes	

---

[11] Adapted from "*Outreach Reporting*". Ontario literacy Coalition. Used with permission.

Sample Resource Feedback/Evaluation[12]

This form was created to collect feedback for a written resource. The statements are tied to the outcomes for each unit of the resource.

MANUAL FEEDBACK

PLEASE use the form below to rate the following aspects of the *Professional Pathways in Adult Literacy* Manual.

	AGREE	DISAGREE
CONTENT The manual provides information that allows me to:		
➲ Demonstrate an understanding of the context in which literacy service and supports occur locally, regionally, provincially, nationally and internationally.		
➲ Create a personal definition of literacy and to relate that definition to the meeting the needs of adult literacy learners.		
➲ Examine my range of skills, knowledge and abilities as they relate to the work that I do, or hope to do, as an adult literacy educator.		
➲ Create a professional portfolio and use this portfolio to demonstrate my commitment to ongoing professional development.		
COMMUNICATION SKILLS		
➲ The manual uses language that is clear and easy to understand.		

Additional Comments:

Participant Satisfaction Survey

PLEASE NOTE: This survey was provided by Cindy Davidson and is intended as an example of the types of questions that you can ask to collect follow-up data. The tear off slip should be on the bottom of a page separate from the survey, **not** as it is shown here.
===

We want to reward you for your feedback! Please complete the attached form and return for a chance to win a $250 Chapters gift card!

Thank you once again for participating in the 'Putting Research Resources into Practice' workshop in 2007-08. As promised we have provided you with a complementary copy of *The 3Rs of Research Toolkit*.

We are interested in hearing about how you have used the information from the workshop and materials since attending the training session.

Please take a few minutes and complete the attached follow-up questionnaire. Return in the stamped envelope provided and your name will be entered in a draw. The winner will receive a $250 gift card from Chapters!

The information we collect will help us plan for future training and projects on this topic. Even if you haven't been able to put any of the information to use yet, please answer the first 5 questions and return.

The steps are simple and quick:
1. Complete the attached follow-up questionnaire as best you can.
2. Detach the bottom of this page and fill in your name and mailing address.
3. Put both the completed questionnaire and your contact information in the stamped, addressed envelope include with this package.
4. Mail by Friday, May 30
5. All submissions will be entered in a draw for a $250 Chapters gift card. The draw will be made on Friday, June 13. The winner will be notified by phone or mail. The gift card will be mailed.

If you have questions, please e-mail Cindy Davidson directly at
cindyda@bmts.com

Thanks for your cooperation and support!
Cindy Davidson
Project Consultant

Detach and include contact information with your completed survey.

Name:	Mailing Address:
Phone:	

Putting Research Resources into Practice

Follow-Up Questionnaire for Workshop Participants

1. Agency Sector:
☐ Community-based LBS
☐ School board LBS
☐ College LBS
☐ Employment Training
☐ Other:_____

2. How much time has elapsed since you participated in the '*Putting Research Resources into Practice'* training session?
☐ Less than 3 months
☐ More than 3 months

3. Based on the Six Stages of Research Integration framework, what stage do you think you were at before attending the training?
☐ Awareness
☐ Information Gathering
☐ Impact Reflection
☐ Preparing for Change
☐ Program Implementation
☐ Exploration and Collaboration
☐ Unsure

4. Based on changes you have made as a result of the research integration training and materials, what stage are you currently at?
☐ Awareness. If checked, skip to question 6.
☐ Information Gathering. If checked, skip to question 6.
☐ Impact Reflection. If checked, skip to question 6.
☐ Preparing for Change. If checked, skip to question 6.
☐ Program Implementation. If checked, skip to question 6.
☐ Exploration and Collaboration. If checked, skip to question 6.
☐ Unsure. If checked, skip to question 6.
☐ I haven't made any changes. If checked, continue to question 5 and then return questionnaire in stamped envelope provided

5. **Please check any reasons for not making any changes based on the research integration training and materials. Check all that apply.**

☐ Lack of time/resources
☐ Lack of support from my agency
☐ I still don't understand how to integrate research resources
☐ I'm not interested in this process at this time
☐ I don't feel this is part of my job
☐ Other:_____

6. **Check any elements of the workshop/materials that you have experimented with. Check all that apply.**

☐ I've read through the information about the importance of research and research integration to understand it better.
☐ I've used the planning sheets to help identify what level of research integration I am at.
☐ I've used the planning sheets to come up with action steps for my research integration plan.
☐ I've referred to the guiding principles and tried some of the suggestions.
☐ I've identified with some of the barriers provided and reflected on some strategies to help overcome the barriers.
☐ I've implemented, or plan to implement, some of the strategies identified.
☐ I've decided to become more involved in research development.
☐ I've shared some of my research integration experiences with others.
☐ I now consider research reflection and integration part of my job.
☐ I've spent time reviewing and reflecting on research resources I have access to.
☐ I have accessed new research resources to review and reflect upon.
☐ I am involved, or plan to be involved, in a research project.
☐ Other:_____

7. **Identify how satisfied you are about how the materials and workshop increased your capacity to integrate research resources into your program practice:**

☐ Very satisfied
☐ Somewhat satisfied
☐ Not satisfied
☐ Unsure at this time

8. **What further supports, materials, training would you like to help increase your capacity to integrate research resources into practice?**

_____

_____

_____

_____

9. **Is there anything else you would like to say about the research integration materials and training you have received?**

_____

_____

_____

_____

Thank you for completing this questionnaire. Return in the stamped enveloped, along with your contact information for the draw for a $250 Chapters gift card by Friday, May 30, 2008.

Literacy Community Planning Evaluation[13]

A literacy services plan is produced annually by the LBS delivery agencies in a specific community, with the support of the regional network. LBS field consultants provide information, support, and direction as appropriate, and the plan is informed by and validated by key community stakeholders.

This form could be modified to reflect any community planning that a support organizations does for its member.
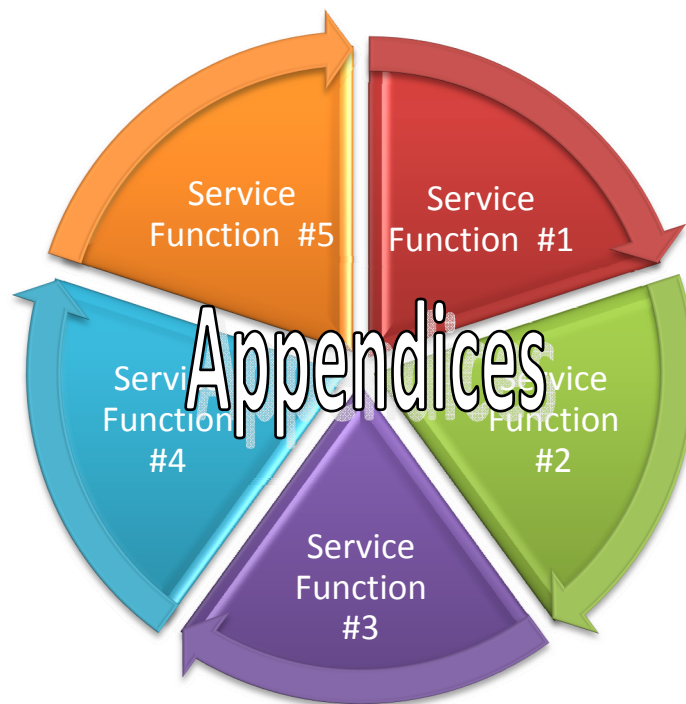
Agency Roles and Responsibilities (as per LBS Guidelines)	Needs Improvement	Meets Requirements	Exemplary
To what extent do you feel this group/your agency has:			
Participated actively and productively in the local planning and coordination process, and the development of the literacy services plan?			
Collaborated in identifying the geographic boundaries of the literacy services plan?			
Shared data and provided information on service projections (number of learners each agency plans to serve, LBS levels, when, where, how, etc.)?			
Shared timely and periodic information relevant to program planning and operations such as: • contact hours			
• successes and challenges			
• referrals			
Received representation and participation from the four cultural streams (if appropriate): • Anglophone?			

---

[13] Adapted from *Literacy Services Planning and Coordination Evaluation*. Literacy network Northwest. Used with permission.

Agency Roles and Responsibilities (as per LBS Guidelines)	Needs Improvement	Meets Requirements	Exemplary
• Deaf?			
• Francophone?			
• Native?			
Developed working relationships with Ontario Works, Job Connect, and other appropriate community service providers/key stakeholders?			
To what extent has this group/your agency collaborated with other agencies in determining and adjusting services to:			
Explain and or substantiate recommendations for these decisions?			
Discuss and describe activities that the group will undertake or recommend for action by the regional network in order to improve the quality of coordination of services?			
Regional Networks To what extent do you feel the network has:			
Coordinated and facilitated a local planning and coordination process that involves all streams and leads to the development of the literacy services plan?			
Established links to the planning activities of Local Boards?			
Provided support to the LSP and coordination group by: • Helping them identify information requirements?			
• Coordinating the gathering and distribution of information?			
• Providing leadership in the analysis of information?			
• Scheduling meetings and distributing agendas and/or minutes?			
• Facilitating the gathering and analysis of regional data pertinent to the LSP process?			

Agency Roles and Responsibilities (as per LBS Guidelines)	Needs Improvement	Meets Requirements	Exemplary
• Consolidating information from the literacy services plans in order to get a regional picture?			
• Collecting literacy services plans for the region and submitting them to the LBS Field Consultant?			
• Orienting new delivery agency representatives to the process?			
Your comments:			
LBS Field Consultant To what extent do you feel the LBS Field Consultant has:			
Ensured that all parties have a clear understanding of the objectives and the required outcomes of local planning and coordination?			
Attended meetings set by the Regional Network as appropriate to assist in developing the LSP and in coordinating literacy services?			
Provided guidance and leadership on the components of a satisfactory literacy services plan?			
Evaluated and provided timely feedback on completed literacy services plans?			
Recommended approval of literacy services plan and/or negotiated changes to the literacy services plan?			
Intervened when the local planning partners cannot reach decisions, in order to ensure stability and continuity of services to learners?			
Your Comments:			

Agency Roles and Responsibilities (as per LBS Guidelines)	Needs Improvement	Meets Requirements	Exemplary
Stakeholders To what extent do you feel the LSP committee has:			
Included key stakeholders?			
Informed key stakeholders?			
Consulted with key stakeholders?			
Incorporated or implemented stakeholders' recommendations or expressed needs into the LSP plan?			
Your Comments:			

Glossary[14]

TERM	DEFINITION
Assessment	Often used as a synonym for evaluation; sometimes recommended for approaches that report measurement without making judgments on the measurements.
Assumptions	The external factors, influences, situations or conditions that are required for project success. Assumptions can be external factors that are quite likely but not certain to occur and which are important for the success of the project or program, but which are largely or completely beyond the control of project management. Assumptions can also include factors that are internal to a specific organization
Attribution	The demonstrable assertion that a reasonable connection can be made between a specific outcome and the actions of a government policy, program or initiative.
Audit	An examination or review that assesses and reports on the extent to which a condition, process, or performance conforms to predetermined standards or criteria.
Baseline/Baseline data	The set of conditions existing at the outset of a program or time frame. Periodic comparisons to baseline data can determine progress, or lack thereof, and allow changes to be made or rational noted.
Benchmark	A reference point or standard against which progress or achievements may be compared.
Benchmarking	Compares that which is being measured to a benchmark such as best practices in the field.
Bias	The extent to which a measurement or method systematically underestimates or overestimates a value.
Capabilities	Resources within an organization that influence the type and scale of activity undertaken by individuals and the organization. (e.g., natural resources, infrastructure, human resources, technology).

---

[14] Adapted from *Organizational Assessment, A Framework For Improving Performance.* Charles Lusthaus, Marie-Hélène Adrien, Gary Anderson, Fred Carden and George Plinio Montalván. Inter-American Development Bank, Washington, D.C. and International Development Research Centre, Ottawa, Canada: 2002.

TERM	DEFINITION
Capacity	Organizational and technical abilities, relationships and values that enable countries, organizations, groups and individuals at any level to carry out functions and achieve their development objectives over time.
Capacity building	The ability of individuals, groups, institutions and organizations to identify and solve development problems over time.
Capacity development	The process by which individuals, organizations, institutions and societies develop their individual and collective abilities to perform functions, solve problems and set and achieve objectives.
Case study	A research process focused on understanding a specific phenomenon, within its real life context, generally involving multiple sources of information.
Conclusion	A reasoned judgment based on a synthesis of findings.
Conflict of interest	When there is a clash between the private interest and the public interest of a person. It is not necessarily fatal to validity (e.g., self-evaluation is a legitimate strategy), but may affect credibility unless various interests are suitably balanced.
Culture	Set of values, guiding beliefs, understandings and ways of thinking that are shared by members of an organization and are taught to new members. Culture represents the unwritten, informal standards of an organization.
Dependent variable	A variable that is thought to be affected or influenced by a program.
Effectiveness	The extent to which objectives or planned outputs have been achieved.
Enabling environment	Attitudes, policies and practices that stimulate and support effective and efficient functioning of organizations and individuals.
Evaluation ability	The extent to which a project or program has been defined in such a way as to enable subsequent evaluation.
Financial viability	An organization's ability to maintain the inflow of financial resources greater than the outflow.
Finding	A factual statement about the program based on evidence. It may involve a synthesis of data and, therefore, judgment.

TERM	DEFINITION
Focus group	A carefully planned and moderated discussion. The purpose is to address a specific topic in depth and in a comfortable environment in order to elicit a wide range of opinions, attitudes, feelings and perceptions from a group of individuals who share some common experience relative to the dimension under study.
Governance	Issues and problems involved in aligning the interests of those who manage an organization with those who are responsible for its results, who own it, and with outsiders who have a stake in the organization.
Impact	The ultimate planned and unplanned consequences of a program; an expression of the changes actually produced as a result of the program, typically several years after the program has stabilized or been completed.
Indicator	An explicit measure used to determine performance; a signal that reveals progress towards objectives; a means of measuring what actually happens against what has been planned in terms of quality, quantity and timeliness.
Infrastructure	Reference to the basic conditions (facilities and technology) that allow work to go on within the organization (e.g., adequate lighting, clean water).
Input	Resources required for achieving the stated results by producing the intended outputs through relevant activities (e.g., human resources, materials, services).
Institutional ethos	Implicit or unwritten codes that include cultural values, norms, religious precepts and taboos. Also known as "informal rules of the game."
Leadership	Process whereby an individual engages in processes of influencing a group of individuals to achieve a common purpose.
Likert scale	A scale that asks respondents to indicate the extent to which they agree or disagree with a statement. Five and seven point scales are the most common; three can be used for special situations and children.
Logic models	The translation of assumptions and mental models of individuals into understandable and familiar systems that complement the needs and expectations of an organization, thus allowing it to make logical decisions.
Missing data	Data that it wasn't possible to collect (e.g., the inability to interview a key informant, limited access to a research setting, blank items on a questionnaire, data entry errors).

TERM	DEFINITION
Monitoring	An ongoing process to verify systematically that planned activities or processes take place as expected or that progress is being made in achieving planned outputs (CIPMS, for example).
Motivation	An intrinsic and moral desire to achieve a purpose.
Niche management	Type of management that involves the identification of and concentration on a competitively valuable capability (or set of capabilities) that an organization has more of or can do better than other organizations.
Objective	Expresses a particular effect that the program is expected to achieve if completed successfully according to plan.
Ongoing relevance	Ability of an organization to meet the ongoing needs, and hold the support of, its priority stakeholders.
Opportunity cost	The value that one gives up by selecting one of several mutually exclusive alternatives.
Outcome	An effect or consequence of a program. Often defined in terms of Immediate, Intermediate and Impact/long term. A result that is the logical consequence of achieving a combination of outputs.
Output	The physical products, institutional and/or operational changes, or improved skills and knowledge to be achieved as a result of specific activities. The immediate, visible, concrete and tangible consequences of project inputs.
Primary data	Information obtained first-hand by the researcher.
Program	A group of related projects, services and activities directed to the achievement of specific goals.
Program evaluation	The process of making judgments about a program based on information and analysis relative to such issues as relevance, cost-effectiveness and success for its stakeholders.
Program rationale	The fundamental reason(s) why a program exists, together with its underlying assumptions.
Project	A planned undertaking designed to achieve certain specific objectives within a given budget and a specified period of time.

TERM	DEFINITION
Project trap	A situation in which a project takes precedence over an organization and its mission, possibly leading to organizational decline.
Qualitative data	Data that use non-numeric information for description. Generally words, but may include photographs and films, audio recordings, and artefacts.
Quantitative data	Information that describes, explains and/or reports on programs and service using numbers.
Questionnaire	A set of written questions used to collect data from respondents.
Relevance	The degree to which the purpose of a project or program remains valid and pertinent.
Reliability	The quality of a measurement process that would produce similar results from repeated observations of the same condition or event, **or** from multiple observations of the same condition or event by different means. Reliability also refers to the extent that a data collection instrument will yield the same results each time it is administered. In qualitative research, reliability refers to the extent that different researchers, given exposure to the same situation, would reach the same conclusions.
Result	Describable or measurable change in a given state that is derived from a cause-and-effect relationship.
Return on investment	In fiscal evaluation, the ratio of benefits to costs, generally expressed as a percentage.
Rules	Legal or regulatory structures within an organization. Rules are one of the most important ingredients of an enabling environment. See also "institutional ethos".
Sample	A subset of a population.
Stakeholders	Any group within or outside an organization that has a stake in the organization's performance. Funders, learners, employees and the general public are all stakeholders.
Success	A favourable program or project result that is assessed in terms of such considerations as effectiveness, impact, sustainability and contributions to capacity development.
Terms of reference	The focus and boundaries of a contract research project, including a statement about who the research is for, the research objective, major issues and questions, and sometimes the schedule and available resources.

TERM	DEFINITION
Triangulation	A process of using multiple data sources, data collection methods, and/or theories to validate research findings, help eliminate bias, and detect errors or anomalies in discoveries.
Unit of analysis	The actual object being investigated (e.g., persons, classrooms, organizations,).
Validity	The largest methodological challenge to organizational assessment, validity refers to the ability of a methodology to be relevant and meaningful as well as appropriate to an organization's mission. See also "reliability".
Validity of an evaluation	The extent to which an evaluation's conclusions are justified by the data presented.
Variable	A characteristic that can assume any one of a range of values.
Work plan	A document that details the resources and methodology to be used in conducting an evaluation, gathering data or conducting any activity related to continuous improvement.

Appendix B

Indicator Criteria Checklist[15]

Organization:

Reviewer:

Instructions to reviewer: for each outcome, please rate <u>each indicator</u> on <u>each criteria</u> using the following scale. Write your rating in the space provided. Please add comments. Explanation of criteria is on next page.

CRITERIA	
Direct	An indicator should measure as directly as possible what it is intended to measure. For example, number and percent of stakeholders consulted.
Specific	Indicators need to be stated so that anyone would understand it in the same way and the data that are to be collected. Example indicator: number and percent of practitioners who report and increase in skills or knowledge as a result of a specific professional development opportunity.
Useful	Indicators need to help us understand what it is we are measuring. The indicator should provide information that helps us understand and improve our programs.
Practical	Costs and time involved in data collection are important considerations. Though difficult to estimate, the cost of collecting data for an indicator should not exceed the utility of the information collected. Reasonable costs, however, are to be expected.
Culturally appropriate	Indicators must be relevant to the cultural context. What makes sense or is appropriate in one culture may not make sense in another. Test your assumptions.
Adequate	There is no correct number or type of indicators. The number of indicators you choose depends upon what you are measuring, the level of information you need, and the resources available. Often more than one indicator is necessary. More than five, however, may mean that what you are measuring is too broad, complex or not well understood. **Indicators need to express all possible aspects of what you are measuring: possible negative or detrimental aspects as well as the positive.** Consider what the negative effects or spin-offs may be and include indicators for these.

---

[15] Adapted from *Indicator Review Worksheet*. University of Wisconsin, Cooperative Extension Department, 2002.

Rating Scale: 1 = Good   2 = Needs improvement   3 = Unacceptable

Indicator Criteria Checklist			
CRITERIA	INDICATOR	RATING	COMMENTS
Direct	1		
	2		
	3		
	4		
Specific	1		
	2		
	3		
	4		
Useful	1		
	2		
	3		
	4		
Practical	1		
	2		
	3		
	4		
Culturally appropriate	1		
	2		
	3		
	4		
Adequate: Together the indicators measure the outcome.			

Appendix C

Questions for Reflection

To help you with your review of the framework, here are some questions for reflection.

Assumptions: *Are there assumptions you would add/delete to make the assumptions a better fit for your organization?*

Does it feel like there are unstated assumptions? If so, what are they?

Inputs and Outputs: *Are there inputs or outputs you would add/delete to it to make these a better fit for your organization?*

Do the activities link to the outcomes? If not, what changes do you need to make?

Outcomes: *As you review the outcomes shown in the logic model, ask yourself if there are outcomes you would add/delete to it to make these a better fit for your organization?*

Are there outcomes which seem key to your overall success at this point in time?

Performance indicators: *As you review the key performance indicators for each outcome, ask yourself if there are indicators you would add/delete to it to make these a better fit for your organization?*

Baselines: *What baselines do you need to set? What data do you need to set accurate baselines?*

Benchmarks: *How will you determine what these are? Who else do you need to involve in the discussion?*

Targets and Milestones: *If the outcome is "pivotal" at this point in time, what reasonable target and milestones should you set?*

Selected Bibliography

A Practical Guide to Documenting Influence and Leverage in Making Connections Communities. Organizational Research Services, 2004. Retrieved from www.organizationalresearch.com/ publications/aecf_influence_leverage_manual.pdf June 2008.

Analyzing Outcome Information, Getting the Most from Data. The Urban Institute. Washington D.C.: 2004. Retrieved from www.urban.org/nonprofits/index.cfm June 2008.

Benchmarking for Nonprofits: How to measure, Manage and Improve Performance. Jason Saul. Fieldstone Alliance, 2004.

Best Practice Features Of Quality LINC Programs. Prepared for The Ontario Region LINC Advisory Committee (no date). Retrieved from atwork.settlement.org/downloads/linc/ BestPract.pdf June 2008.

Best Practices for Executive Directors and Boards of Non-profit Organizations. Whatcom Council for Nonprofits. Retrieved from www.wcnwebsite.org June 2008.

Building a Common Outcome Framework to Measure Non-profit Performance. The Center for What Works. Chicago, Illinois: 2006. Retrieved from www.urban.org/nonprofits/index.cfm June 2008.

Community Planning Key Performance Indicators Report. South Lanarkshire Community Planning Partnership, 2006. Retrieved from www.southlanarkshire.gov.uk/coins/ commpdfs/public/9190.pdf June 2008.

Designing Outcomes-Oriented Performance Measures for Social Services. Margaret A. O'Brien-Strain and Ursula M. Bischoff. The SPHERE Institute, 2001. Retrieved from www.sphereinstitute.org/publications/SMOBMDesign.pdf June 2008.

Developing a Logic Model: teaching and training guide. Ellen Taylor-Powell and Ellen Henert. University of Wisconsin-Extension. Madison: 2008. Retrieved from www.uwex.edu/ces/pdande June 2008.

Developing Community-wide Outcome Indicators for Specific Services. The Urban Institute, Washington D.C. 2003. Retrieved from www.urban.org/nonprofits/index.cfm June 2008.

Everything You Wanted To Know About Logic Models But Were Afraid To Ask. Connie C. Schmitz, Professional Evaluation Services, Minneapolis, MN and Beverly A. Parsons, InSites, Boulder, CO, 1999. Retrieved from www.insites.org/documents/logmod.htmJune 2008.

Getting the Foundations Right: TBS Management Accountability Framework. Retrieved from www.tbs-sct.gc.ca/eval/tools_outils/perf-rend/perf-rend_e.asp June 2008.

How Good is Our Community Learning and Development? Self-evaluation for quality improvement. HM Inspectorate of Education, 2006. Retrieved from www.hmie.gov.uk/ documents/publication/hgio2cld.html June 2008.

Indicators of Effectiveness. Understanding and improving Foundation Performance. The Centre for Philanthropy. Boston: 2002. Retrieved from www.effectivephilantropy.org June 2008.

Is it Working? Social Enterprise Performance Measurement. Irene Gannitsos and Joanne Norris. Workshop Presentation. Vancouver: 2007. Retrieved from www.enterprisingnonprofits.ca/ Social_Impact_Assess June 2008.

Logic Model Development Guide. W.K. Kellogg Foundation. Battle Creek, Michigan: 2004.

Organizational Assessment, A Framework For Improving Performance. Charles Lusthaus, Marie-Hélène Adrien, Gary Anderson, Fred Carden and George Plinio Montalván. Inter-American Development Bank, Washington, D.C. and International Development Research Centre, Ottawa, Canada. 2002. Retrieved from www.idrc.ca/en/ev-23987-201-1-DO_TOPIC.html June 2008.

Outcomes Based Evaluations Using The Logic Model. Centre for Substance Abuse Prevention, 2002. Retrieved from communitiesconnect.wikispaces.com/file/view/OutcomesBased +Evaluations+Using+the+Logic+Model_2002.pdf June 2008.

Surveying Clients About Outcomes. The Urban Institute. Washington D.C.:2003. Retrieved from www.urban.org/nonprofits/index.cfm June 2008.

Targeting Outcomes of Programs. Kay Rockwell and Claude Bennett. University of Nebraska-Lincoln. Retrieved from citnwesunl.edu/TOP/downloads/TOP.pdf June 2008.

The ABCs of CIPMS. Vicki Trottier and Jette Cosburn. Community Literacy of Ontario, 2008.

The Ants and the Cockroach: A Challenge to the Use of Indicators. Chris Whitehouse. 2003. Retrieved from http://www.mande.co.uk/docs/Indicators - The Ants and the Cockroach.pdf June 2008.

The Community Health Worker Evaluation Tool Kit. University of Arizona, Rural Heal Office and College of Public Health. University of Arizona, 2008. Retrieved from www.publichealth.arizona. edu/CHWtoolkit June 2008.