Building a Performance Framework for LBS Support Organizations
Phase 2

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Introduction

A wise old man is walking with a young boy along a beach covered with starfish sweltering in the hot sun. The old man picks up one of the starfish and flings it far out into the water. The boy asks why, since he knows the old man can't possibly rescue enough starfish to really make a difference to the countless others strewn on the beach. "Yes," the old man replies, "but it made a difference to that one."

BUILDING A PERFORMANCE FRAMEWORK—PHASE 2

Support organizations in Ontario play an important role in the education and training framework developed by the provincial government. The purpose of *Building a Performance Framework – Phase 2* was to provide many of the support organizations in Ontario with information, training and tools that would allow them to increase their knowledge of performance management concepts. Increasing support organizations' knowledge and use of performance management concepts is one approach to strengthening their capacity to support the programs and organizations that deliver literacy upgrading services to adult learners in Ontario.

The project was designed to build on the resources developed during Phase 1 (2008). During Phase 1, logic models and immediate, intermediate and long-term outcomes were developed for the Ministry of Training, Colleges and Universities (TCU) funded service functions[1] that were in place at that time. The TCU service functions were used as the starting point for the logic models because all support organizations in Ontario write their business plans based on the same set of service functions. This provided a common base from which the logic models could be created. The drafts of the logic models were called "living drafts" as the intent was to provide support organizations with a draft from which they could build logic models that were tailored to their specific work environments.

[1] In this document, as in Phase 1, the key services that are funded by TCU are referred to as service functions. In the business plan document, they are referred to as "service categories".

Phase 1 focused on the development of a potential framework for support organizations. In a performance framework a logic model provides organizations with the opportunity to describe what they will accomplish. A performance framework, through the use of performance indicators, helps organizations to decide not only what to measure, but also how to measure the outcomes that have been set.

Phase 2 focused on the performance measurement aspect of the framework. Performance measurement describes how resources are being used (efficiency), how the work being done contributes to the achievement of stated outcomes (effectiveness) and whether or not the organizations' "customers"—delivery agencies and other stakeholders—are satisfied with the results.

Before you can measure performance you need to think about and create performance indicators, performance measurement tools and a process for collecting and storing the data.

Changes to TCU Funded Functions

Between Phase 1 and Phase 2 TCU revised its service functions or categories. Two of the service functions in place in 2008 were dropped and an additional function was created. For the 2010-11 business planning cycle, the service functions were:

1. Support TCU-funded delivery agencies to deliver coordinated, quality LBS services responsive to emerging needs (identified by the community and government) within an integrated employment and training system
2. Provide support for Ministry led initiatives using a model of continuous improvement
3. Develop and provide quality resources that support TCU-funded agencies to deliver E-Channel Learning
4. Develop and provide accessible and quality resources that support TCU-funded agencies to deliver LBS programs.

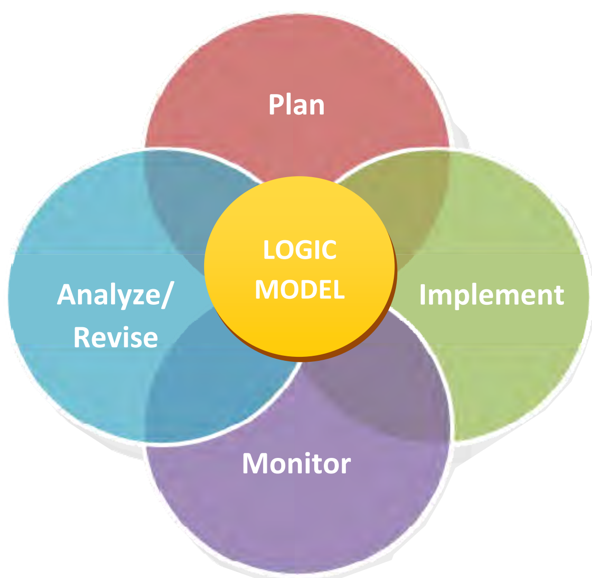
In this document we will refer to the service functions as numbered above.

During this second phase, two of the Phase 1 logic models were revised. These were TCU service functions two (Provide support for ministry led initiatives using a model of continuous improvement) and four (Develop and provide accessible and quality resources that support TCU-funded agencies to deliver LBS programs).[2]

At the training workshop (June 2010) a logic model with some outcomes and a number of performance indicators were developed for TCU service function three (Develop and provide quality resources that support TCU-funded agencies to deliver E-Channel Learning.[3])

Logic Model Overview

Logic models and performance indicators as part of the cycle of continuous improvement shift focus away from the *processes* you are engaged in towards the *results* you are achieving. Logic models are a way to describe programs and a way to focus attention and resources on priorities. Logic models are also used as a tool for program evaluation.



[2] Wording and numbering taken from: “Literacy And Basic Skills (LBS) Program. Business Plan 2010-2011. Support Organizations”.

[3] Ibid.

As a starting point for a performance framework, logic models give you the opportunity to examine the broad scope of work you do for TCU. They are 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 the literacy field in Ontario (monitoring and analyzing/revising). This multi-function ability allows for the creation of a clear and easy to understand "picture." Naturally, like all pictures, this one will reflect a particular point in time, based on certain assumptions.

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."[4]

Logic Model Development

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. As a result of your ongoing consultation and development process you will gather the information you need to create a logic model that describes a clear picture of your contribution to the solution of a problem, issue or situation.

While the logic models and performance indicators in this document were developed *for you*, they were created using information collected from a variety of sources: one-to-one interviews, feedback from training workshops, business plans provided by many support organizations and input from advisory team members. As previously mentioned this is one of the reasons why they have been labeled "living drafts" – the intent is for you to use them as a starting point and then revise them to fit your current situation.

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

One of the most common ways to present a logic model is in a table format. And while this may create a look or feel of the information being “locked in”, that is not the intent. The format provides an easy to understand illustration of what you are doing—and one that can be revised as needed.

In the following sections we’ll describe the process for creating a logic model and at the same time take a brief 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. More information regarding the living drafts can be found in the Phase 1 Report available from Project READ Literacy Network.

It’s important to remember that none of this information is meant to be exhaustive or prescriptive—all of it should be considered a starting point. Of course, you can use the information in each logic model as is, but as you review the living drafts in this document you will probably start to refine them to more closely represent the work of your specific organization.

The first step that you should follow when revising the living drafts (or when creating new logic models) is to begin to answer these two questions:

1. What is the problem or situation you are trying to “solve” or resolve?
2. What do you know to be true or certain about the problem or situation? In other words, what are your assumptions?

What is the problem or situation you are trying to “solve” or resolve?

The living drafts were created using the TCU service functions as the “problem” or “situation” that you are working towards “fixing”. For example, what is your organization’s role or focus in terms of the service function “Provide support for Ministry led initiatives using a model of continuous improvement”?

For this particular service function there is no simple answer. Your approach will depend on a number of factors, including what the focus of the initiative is, what you have the capacity to provide within current resources, whether or not the stakeholders you represent have identified the initiative as a priority…

The development of a logic model can help you to determine what your role *could be* using current resources and can also help you determine what additional resources you need to increase your capacity. For example, if you think you want to be the lead agency on a TCU initiative, the development of a logic model should help with writing the funding application.

What do you know to be true or certain about the problem or situation? In other words, what are your assumptions?

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.

Below are the assumptions that were reviewed and revised during Phase 2.

Assumptions for service function #2: Provide support for Ministry led initiatives using a model of continuous improvement:

Over-arching assumption: 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 a ministry planning process that reflects larger TCU planning and directions.
2. MTCU initiatives/priorities are communicated to support organizations through the annual business plan development and by special communications to the field.

3. Ideally, TCU's rationale for an initiative or priority area is described in a clear, uniform manner to all service support organizations.
4. Ideally, TCU provides sufficient resources (monetary and human) to allow for implementation of initiatives (new and/or ongoing) across regions, sectors and/or streams.
5. Support organizations provide information about and/or training for TCU initiatives/priorities in a positive and supportive manner.
6. Support activities related to a specific initiative or priority area are developed based on information available at a particular point in time.
7. As a result of their role in TCU led initiatives, support organizations gain skills and expertise that increase their profile within the ministry and with the community they serve.

You'll find the complete logic model for service function two in Appendix 1. In Appendix 2 you will find a worksheet to use to help you review and affirm your own assumptions for any of the logic models.

If you were creating a **new** logic model you would have a number of choices at this point. In logic model development, outcomes are the end points you are working towards. You could start by setting some outcomes and then work backwards to determine the inputs and outputs.

You could also start in the middle, so to speak, and determine what outputs you will achieve. You could also start with inputs and move forward from there.

Which starting point you use doesn't matter. In fact the whole process of developing a logic model is circuitous. Even if you start with outcomes you will probably find yourself jumping ahead to outputs and inputs. What is most important is that you end up with a logic model that provides you and others with an easy to understand "illustration" of what you are doing.

For the purpose of this document we are going to start with the inputs, then move on to the outputs and then finally describe the outcomes for the service function that says you will provide support for Ministry led initiatives using a model of continuous improvement. One thing to keep in mind: in logic model "language" certain terms have specific meanings. For example:

- **Inputs** are the resources you will need to achieve the outcomes you set. You can begin by thinking about the assumptions you have made. You will revisit the inputs several times as you determine the outputs and outcomes.

- **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).

- **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).

Now let's go back to service function #2 and take a look at each of these key components. Based on consultations with staff working in a number of sector and stream organizations and with regional network staff sitting on the advisory team, this service function was revised during Phase 2.

Service Function #2: Provide support for ministry led initiatives using a model of continuous improvement

Inputs:

Based on discussions with staff from a variety of support organizations (sector, stream and regional networks) the following inputs were identified:

- Qualified staff (support orgs)
- Resources (materials, funding, research/information)
- Clear information from TCU

Outputs:

While a specific TCU initiative has not been identified, it was determined that *in general* the following **activities** would take place:

- Analyze data from annual scan/survey[5]
- Identify priorities
- Identify opportunities to collaborate and to build and maintain partnerships
- Identify best approach for disseminating information about TCU initiatives/priorities to service delivery agencies and others and back to TCU

The activities would lead to these **results** (again in general terms):

- LBS agencies receive the resources (support/information/ training) they need
- Opportunities for partnering/collaboration identified

[5] An annual scan or survey of the "community" that your organization serves is assumed to take place. For sector and stream organizations this data could come from the annual survey of your constituents. For regional networks this could be data that is collected during the Literacy Services Planning process.

- Support organizations provide TCU with up-to-date feedback about the roll out of TCU initiatives/priorities
- Support organizations develop expertise

Time lines have not been set for any of the outcomes. Instead they have been defined in terms of a *progressive set of changes*. An immediate outcome would reflect changes in things such as awareness, knowledge, attitude, opinions and motivation.

Intermediate outcomes reflect changes in things such as behaviours, practices, decision-making and policies. Finally, impact outcomes reflect changes in things such as reputation, position, funding, opportunities and learner satisfaction.

In other words, immediate outcomes are about *learning*, intermediate outcomes are about *taking action* based on what has been learned, and impact outcomes reflect the *change in conditions* that will result at some point in time as a result of your actions. Below are the outcomes for this service function.

Immediate (changes in learning):

- Support organizations have a better understanding of TCU initiatives/priorities and how to support them
- Data collection and analysis contributes to an increase in continuous improvement for both support organizations and delivery agencies
- Support organizations are a key component in TCU led initiatives/priorities

Intermediate (changes in actions)

- Service delivery is more responsive to the needs of adults
- Literacy service delivery agencies and support organizations work together to provide a training and employment system that is more responsive to TCU initiatives/priorities

Impact (changes in conditions, behaviour)

- Governments have better information on which to base their funding and policy decisions
- Provincial targets for number of learners served are met
- Delivery agencies have better information on which to base programming decisions

In the following chapters we will focus on performance measurement—indicators and tools.

Measuring and Monitoring Overview

"Good performance measurement is an exercise in telling a clear story, backed by credible evidence, about the value that a program adds to Canadian society.

~ Treasury Board of Canada Secretariat

A logic model and its performance indicators should help you on a day-to-day basis because they help you focus attention on priorities for resources—whether that is your time, money, physical space or documents. Logic models help you to be *intentional* in your approach to resource allocation.

As you work toward achieving the outcomes you have set, the key performance indicators attached to the logic models act as a useful check point. Are you on track? Do the outcomes or indicators still make sense or do you need to make some revisions? Have the activities that you envisioned happened, or have you had to make changes? In a climate and culture of limited resources, allowing you to make timely changes is one of the most valuable functions that a performance framework and performance measurement can play.

Performance measurement is fundamentally about finding a way to systematically **evaluate the impact** your organization has on the "customers" you serve—whether they are the service delivery organizations you work with or whether you provide some form of direct service to a broader community. In fact, performance measurement is a valuable management tool because it allows you to document and quantify the work that you do. This, in turn, allows you to demonstrate that what you do does make a difference.

If you still have some doubts about performance measurement, here are five reasons why you should measure performance:

1. *To understand whether current activities are working to achieve intended results.* Performance measurement helps you to understand whether what you are doing achieves the results

you sought and ensures that the impact you have is the intended one.

2. *To drive improvement and share information about effective practices with others.* Performance measurement also drives program improvement and information sharing. If your program is doing something that works well, share it with others.
3. *To ensure a common understanding of what you intend to achieve and how you intend to do it.* Performance measurement helps to ensure that everyone (partners, staff, the programs you serve, funders and others) is on the same page—this is especially important for partners and funders who are not involved with your program on a day-today basis.
4. *To communicate and "advocate" for community support.* As support organizations the community you serve is the sector or stream determined by the sector or stream you work in, or by the region if you are a regional network. Regardless of how you define community, you want to be able to communicate and advocate for your program's effectiveness to others.
5. *To accomplish the outcomes you have set.* When you add things to a to-do list, you are more likely to get them done. The same goes for performance measurement—if you take the time to articulate your programs' goals and the steps you need to take to accomplish them, you are more likely to see results.[1]

Describing Success

As we noted in Chapter 1, outcomes answer the "so what" question. For example, what would be the "so what" of a workshop you provided to practitioners? An immediate outcome might be a better informed workforce. How would you know if you have been successful?

Performance indicators are the evaluative component of a logic model. They are the quantitative or qualitative measurements/ demonstrations of the outcomes. In other words, they provide the

[1] Adapted from *What Gets Measured Gets Done*. Brooke Spellman and Michelle Abbenante. National Alliance to End Homelessness: 2008.Retrieved from www.endhomelessness.org/content/article /detail/2039 December 2009.

means for you to demonstrate the “so what” value of the work that you do. While indicators are set prior to an activity taking place they are not carved in stone. They, like the logic model itself, should be reviewed and revised as situations change.

An indicator statement describes how you will know change has happened as a result of your work. It describes the specific pieces of information you will collect, document and analyze so you can track, or indicate, your progress or success. To go back to the workshop example mentioned above, an indicator could be 60% of practitioners indicate they have gained new knowledge.

Outcomes can be the result of many factors. Do you need to measure all the factors? Probably not. But before you can decide what to measure or what not to measure you need a solid understanding of what will take place—what the results will be. You also need to decide whether you can attribute the change *directly* to your work or if your work *contributes* to the overall achievement of a desired outcome.
In general, one to three indicators is usually a realistic number for each outcome you have identified. In fact, some outcomes can be easily measured with only one indicator. The indicators you select need to provide the evidence that demonstrates progress towards, or successful achievement of, an outcome.

How will you know when an outcome has occurred? What will you see or not see? What you measure will depend on the outcomes you have set and the inputs and outputs you have put in place.

Here are a few basic guidelines to help you think about what you should be measuring:

1. *Measure quality over quantity:* Find a way to measure the number of people who actually implement a change in addition to the number of people who attend a training workshop.
2. *Pick the “low hanging fruit”*: Start with a few areas in which you can easily measure change.

3. *“Garbage in” can result in “garbage out”:* If you use inaccurate or incomplete data, then you run the risk of reporting inaccurate information or ending up with incorrect conclusions.

4. *Allocate adequate resources:* Don't assume that measurement has to be expensive, but be sure to create a budget line for data collection. For example, while web-based surveys can be free in terms of collecting data, you still need resources to create and analyze the survey (and don't forget guideline #3—to get the "right" data you need to create the right survey questions—you will get what you "pay" for).

5. *Be realistic:* Be clear about what you **want** to measure, what you **can** measure and how, given the level of **investment required** for the measure, you will use the information.

6. *Stay focused:* Prioritizing is a critical component of all social purpose campaigns, and for good reason—you have limited resources (human, financial, etc.) so you need to set clear goals in terms of what your current capability or capacity is and where you want it to be in the future.[2]

It is also important to keep measuring and monitoring tasks manageable. For example, look for ways to integrate outcome monitoring into existing monitoring systems without increasing the number of questions that someone has to answer (and the amount of data that you will have to review). Some organizations use the move to an outcomes focus to review and revise existing data collection. In some cases they've been able to identify that they are collecting information that really serves no purpose.

You also need to consider how often or when you collect the data. Are you collecting both pre and post data? Are you also collecting data during an event or an activity? Is your data collection a single point in time? More sophisticated data collection might involve a comparison between two or more groups. Here are seven key questions to consider:[3]

1. Do you expect change to occur immediately, gradually or over a long period of time?

[2] Adapted from *Measuring What Matters, The Challenge of Quantifying Social Change*. Retrieved from: www.metgroup.com December 2009.

[3] Adapted from *Creating a Plan for Your Outcome Measurement System*. Retrieved from http://www.acf.hhs.gov/programs/ocs/ccf/about_ccf/gbk_om/om_gbk_plan.html.

2. Are there milestones that can be measured along the way to the outcome you are trying to achieve?

3. What is the frequency of contact with the organizations with which you are working—once, weekly, monthly or at some other interval?

4. When will data be available?

5. Are there any groups that might serve as comparison groups?

6. Do you have baseline data you can use as a standard?

7. Are you accountable for short-term outcomes or longer-term impacts?

Collecting data isn't new. You are already collecting information from annual surveys or event evaluations, for example. Where you may need to focus your attention is on refining the information that you collect and/or "mining" data you already have to demonstrate that you are achieving the outcomes that you have set.

Setting indicators isn't without its challenges—especially for support organizations—as some outcomes are hard to measure. For example, how do you measure activities that support or supplement the work of other agencies? What other factors do you need to consider?

Attribution versus Contribution

Before we begin to look at potential indicators it's a good time to review the concepts of attribution and contribution. Attribution, in terms of performance management, refers to things that you do that are a *clear link* to the outcome. Contribution means that things you have done *have probably helped*, but the linkage isn't quite so clear. Here's an 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 or shared when someone calls looking for information, how the call is documented and what follow up is done. After a period of time you find out that people have been so pleased with the information they received that they tell others about 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 can measure any intermediate outcomes (change in action); and it could take a year or more before an impact outcome is achieved (change in condition).

In this 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…").

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.

To go back to the example, if you change the type of information you send out or the manner in which you share information and you document who has called and also request permission to follow up, then you should have a reasonable expectation that you can determine whether or not people were happy with the information

they received. If they are happy with the information they received then it is possible that they will recommend you to someone else.
In this example, how easy will it be to attribute the change in practice (intermediate outcome) or the change in reputation (impact outcome) to the workshop you attended? 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.

Setting Indicators

Here are some general guidelines for setting or selecting indicators:

- **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 them, for example, 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.

- **Measure all aspects:** 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.

Influencing Factors

Influencing factors are those things over which you may have little or no control, but they do impact on your ability to measure and demonstrate success. Two common types of influencing factors are those related to participants and those related to a situation or organization.

Participant factors, such as demographics, level of experience, and length of time in the field may need to be taken into account when analyzing data. For example, if you deliver training to program staff who have worked in the field for varying lengths of time, then this range of experience could impact on your ability to demonstrate success. If you ask, on a workshop evaluation form, about the usefulness of the workshop, people new to the field might find the workshop extremely useful, while those who have been around for a while might not agree. Asking participants to indicate how long they have worked in the field will allow you to group responses.

Organizational or situational factors are those factors that belong to your organization or to a specific situation. The number of staff you have, the methods used to create or share knowledge or whether you deliver a training workshop once or ten times are just three examples of this type of factor. Here's an example: you hire someone as a project coordinator and they do a great job. You then ask that person to facilitate a workshop and the feedback from participants indicates that the facilitator did a poor job. You might have a great product but a poor facilitator clouds the impact. You'll need to make sure that you ask questions, on the post-event evaluation that will allow participants to separate their value/view of the content from the skills of the facilitator.

Potential Indicators

Now let's go back to the service function (#2) that we looked at in Chapter 1 and take a look at some suggested or potential indicators for the outcomes.

Service Function #2: Provide support for ministry led initiatives using a model of continuous improvement	
OUTCOME	**INDICATOR**
Immediate Outcomes	**Performance Indicators**
1. Support organizations have a better understanding of TCU initiatives/priorities and how to support them	• Support organization's annual business plan reflects TCU priorities
	• Support organization's priorities are based on consultation and collaboration with pertinent stakeholders
	• Process for prioritizing TCU initiatives/priorities is clearly articulated and documented
2. Data collection and analysis contributes to an increase in continuous improvement for both support organizations and delivery agencies	• Change in organization's results is documented in program monitoring report
	• % of funder statistical targets achieved by delivery agencies
3. Support organizations are a key component in TCU led initiatives/priorities	• Information, training and support LBS agencies receive is relevant to TCU initiatives/priorities • LBS agencies rate the information, training and support as effective in supporting their ability to meet TCU expectations
Intermediate Outcomes	**Performance Indicators**
1. Service delivery is more responsive to the needs of adults	• 55% of participants who receive information, training or support indicate they implemented changes with regard to TCU initiative/priority
	• 55% of LBS learners report satisfaction with LBS service received • Information collected annually indicates how program offerings are directly based on identified learner needs
2. Literacy service delivery agencies and support	• Documented partnerships between support organizations and delivery agencies are relevant

Service Function #2: Provide support for ministry led initiatives using a model of continuous improvement	
OUTCOME	**INDICATOR**
organizations work together to provide a training and employment system that is more *responsive* to TCU initiatives/priorities	to TCU initiatives/priorities
	• 40% of LBS agencies report making responsive changes to program design, management and/or delivery
	• 55% of agencies or members surveyed indicate that they are satisfied with information they received from the support organization
Impact Outcomes	**Performance Indicators**
1. Governments have relevant information on which to base their funding and policy decisions	• Funding from provincial government is adequate for current and future identified needs and priorities
	• Policy and program decisions more accurately reflect the needs of the field
2. Delivery agencies have better information on which to base programming decisions	• % of LBS agencies that indicate they have increased their ability to be responsive to needs of adult learners

Are these indicators realistic? Are they valid? How could you measure them? One the best ways to decide whether or not the indicator is valid is to think about what you would need to do to collect the data.

See Chapter 4 for sample indicators for all the logic models discussed in this document.

In the next chapter we'll take a look at data measuring and monitoring tools.

Tools for Measuring and Monitoring

"While the field has evolved, funders and social purpose investors still wrestle with the most fundamental of questions: How do they know that their grants and investments are achieving desired results?"

~ Measuring What Matters: The Challenge of Quantifying Social Change

Performance measurement is a key component of any performance management system. Performance measurement should help you better understand and improve the programs and services your organization offers. When performance measurement is part of a performance management system, you will have a process that systematically helps you to determine how you are making an impact and to help you improve what you are doing so you can achieve better results. If you only view performance measurement as something you need to do to keep a funder happy, then you will be missing out on opportunities to truly make a difference—however small you think the change.

When you look at one of the logic models, you can see that it is possible to measure all of the components. You can measure the inputs (Did you have the right resources or the correct mix of resources?); outputs: activities and results (What did you create? Did you deliver what you said you would?); and, outcomes (Did you have the intended—or even unintended—impact?).

Measurement of inputs and outputs is the most common type of measurement, and mostly because it is relatively easy to capture data. Measuring outputs—as framed by performance indicators—can be a bit more difficult. In today's funding climate measuring outcomes is of most interest to funders—as can be seen in TCU's business plan template: "what measureable evidence will you use to show that you have achieved the outcome…?"

Let's take a look at some of the components of the logic model[1] for the TCU service function for E-Channel Learning to illustrate what you might measure, the tools you could use and the level of difficulty that you might have collecting data.

Service Function #3: Develop and provide quality resources that support TCU-funded agencies to deliver E-Channel Learning	
WHAT YOU WANT TO MEASURE	POTENTIAL MEASUREMENT METHOD
Inputs:	
Money	In-house review of documents (e.g., Was the funding sufficient?)
Staff	In-house review (e.g., Did you have the right staff? Did you have enough staff?)
Clear information from TCU	In-house review of correspondence with TCU
Outputs:	
Research report	Document evaluation form; follow-up interviews with people who received the report
Training sessions	# of training sessions, # of participants, # of delivery hours, session evaluation reports, # of interviews with participants
E-learning website developed	Website evaluation tool on website; web usage report, including number of hits on website and length of stay;
Case studies (how agencies are using E-Learning)	Document evaluation form; follow-up interviews with people who received the product
How-to guide for practitioners	# of downloads of how-to guide and other documents; document evaluation forms received; follow-up interviews with people who received the product

[1] The logic model for this service function was partially developed by participants at a face-to-face workshop held June 1 and 2, 2010. You'll find the complete logic model in Appendix 1.

Service Function #3: Develop and provide quality resources that support TCU-funded agencies to deliver E-Channel Learning	
WHAT YOU WANT TO MEASURE	POTENTIAL MEASUREMENT METHOD
Outcomes:	
Increase in knowledge of E-Channel (Immediate)	Pre and post workshop evaluations; 6 month follow-up survey
Support organizations have increased ability to support delivery agencies (Intermediate)	Funder monitoring report; organization's annual report
Progress is made toward outcomes set by TCU (Impact)	Funder monitoring report; funder's annual report to minister

Adding Value

To collect the evidence you need to tell a clear story, you'll have to decide the best way for you to collect your data, what data you need, how you will present the information (what the date tells you) and what you will do with the information.

Key Questions to Consider

Focus: What is it you want to find out? What are you measuring/ evaluating? Who needs to be involved in the process? How will the information be used?

Collect data: What data? How hard or easy is it to get? What tools are you using? When are you collecting the data? What are your sources of information? What is the most appropriate tool?

Analyze data: What does the data tell you? What tools are you using to analyze the data?

Report: Who wants to know what you've found out and why?

Revise: What changes will you make based on what you've found out?

Baselines, Benchmarks, Targets and Milestones

Setting an indicator is only a part of the measurement story. There are other factors that you need to consider before you can begin. These are baselines, benchmarks, targets and milestones. For this project the following definitions were used for each of these terms.

Baseline

- Reflects current practice
- Helps to clarify the implications contained in the indicator

Baseline data reflects the set of "conditions" existing at the outset of a program or time frame. Making a note of the "conditions" before you begin will allow you to make comparisons over time. You can determine progress, or lack thereof, and make appropriate changes or create a rationale for the situation.

Benchmark

- A "standard" against which the performance can be measured
- Reflects goal(s) you are working towards

Benchmarks aren't used very much in the literacy field in Ontario. The closest we come to benchmarks are the provincial goals set by TCU (for example, the increase in the number of adults accessing LBS programs in a given year).

Targets

- Reflect things you want to achieve at a particular point in time

Setting targets will help you to adjust what you are doing while you are doing it. For example, if you said you would consult with 20 organizations during the first 3 months of a project and find that the number is unrealistic, then you can make an adjustment and refine your target.

Milestones

- Markers along the way

Milestones are really short distance markers or check-in points. Going back to the example of contacting 20 organizations, you would probably decide that you need to reach 5 every 2 weeks (your milestone) so you would have time to write a report on what you learned; if it's week 3 or 4 and you haven't had any contact with 5 organizations, then you will probably adjust the total number of organizations or re-evaluate the type of organization you are attempting to contact.

Measurement Tools

There a limited number of tools that you need to use and most, if not all, of these you are already using. What you may need to do is refine or refocus your evaluation tools. During Phase 1 the following were identified as the key measurement tools:

- "Needs" Assessment – annual/semi-annual survey of the stakeholders you serve
- Pre and Post Evaluations of workshops/events
- Participant Follow-up Survey

- Document review: Reports, meeting notes, other types of communications

You can find samples of these tools in the Phase1 report. To download the report go to www.projectread.ca/practitioners and scroll down to the link to *Building a Performance Framework for LBS Support Organizations in Ontario.*

In terms of measuring specific indicators, it isn't all or nothing. Rather, start with a few areas in which you can easily measure change ("low hanging fruit").

You can collect information on the same outcome in more than one way, for example, through a combination of participant self-assessment and focus groups. Using more than one method can increase the strength of your findings. Also, it is possible to use one tool to collect information that addresses two or more outcomes and performance indicators. For example, the data collected from the annual organization evaluation survey you conduct should, if the questions are worded appropriately, provide you with evidence for several outcomes and indictors.

Analyzing Outcome Information

Quantitative analysis

For the most part, you only need a simple quantitative analysis—averages and percentages. For example, the number of workshops held and the percentage of practitioners who attended a particular workshop.

Qualitative analysis

While qualitative data asks respondents to express their opinion, you can summarize and group the information collected. Qualitative analysis can be very complex, often involving looking at the themes and ideas that emerge from people's comments.

If you ask enough people the same question, you can turn qualitative data into quantitative data. For example, if you ask “What suggestions do you have for future professional development?” you can group responses into common or similar responses. From here you will be able to say (for example) “70% of respondents requested…”.

Interpretation

What does the data tell you? When you look for trends and issues, you will be able to highlight what went well (or is going well). If the data collection is at a mid-point or at the end of the first of a series of workshops (for example), then you can also determine whether change or improvements are needed.

You need to situate your analysis or interpretation into the context of your organization. Survey results should tell whether or not you’ve achieved an outcome. Here’s an example: your immediate outcome is an increase in practitioner’s knowledge about E-Channel learning. If you ask people to rate their increase in knowledge, then you’ll be able to say whether or not this has happened. But can you clearly demonstrate why it happened?

If you have set your indicator to say that 85% of practitioners will have increased their knowledge about E-channel learning and you don’t meet the target or you exceed that target, can you explain why?

To help you understand the results better, and to provide context for the results, you need to filter the results by asking questions such as:

- Was the level of inputs adequate? For example, to what extent did the level of money or staffing devoted to the project affect the outcome?
- Was the outcome affected by the way in which the work was carried out?
- Did other factors influence[2] the results?

[2] Influencing factors are those things over which you may have little or no control, but they do impact on your ability to measure and demonstrate success. See Chapter 2 for more information.

- Were the outcomes or objectives as originally stated realistic or appropriate? Should they have been revised (or should they be revised if you are at a mid-point)?

Sometimes, even if you have collected evidence of changes in your target audience, it can be difficult to attribute the change to your work. When possible, get information from more than one source. You can also ask survey respondents or interviewees if they can attribute any of the changes they have made to services or information that you have provided. For example, you could ask questions such as:

- Did you make any changes (yes/no)?
- If so, what changes?
- If not, why not?
- Do you attribute any of the changes (or results) to services or information provided by [name of your organization here]?

Selecting the best data collection tool

A checklist can help you decide which data collection methods are most appropriate for your outcome measurement. Below is one example of a checklist.[3] You will also find this checklist in Chapter 5.

Checklist for Selecting Data Collection Methods		
Surveys	Yes	No
1. Do I need data from the perspective of the participant or recipient?		
2. Do I have a way to get information from these individuals in a systematic way?		
3. Do I need data that are standardized so that statistical comparisons can be made? (For example, will I need to report percents or other statistics?)		

[3] Adapted from: *Measuring Outcomes*. National Resource Centre (U.S. Department of Health and Human Services), undated publication. Retrieved from www.acf.hhs.gov/programs/ocs/ccf/resources/toolkit.html#gbks January 2010.

Checklist for Selecting Data Collection Methods		
4. Will participants be able to understand the survey questions? (Consider age, cultural backgrounds, etc.)		
5. Do participants have the necessary knowledge or awareness to accurately answer questions about the outcomes?		
If you have answered YES to questions #1 through 5, surveys may be appropriate for collecting data on your outcomes and indicators.		
Interviews	Yes	No
6. Are more in-depth answers necessary to adequately measure the indicators or to get information on what is needed or what should change?		
7. Will it be necessary for someone to personally ask participants questions (either on the phone or in person) in order to collect the information related to this outcome?		
If you have answered YES to questions #6 and 7, interviews may be appropriate for collecting data on your outcomes and indicators.		
Observation	Yes	No
8. Is it difficult to accurately measure the indicators by asking people questions about opinions or perceptions?		
9. Can this outcome or indicator be assessed accurately by someone trained to observe it in action—can something actually be observed?		
10. Do you have the staff resources for someone to observe events, conditions, interactions or behaviours?		
If you have answered YES to questions # 8, 9 and 10, observation may be appropriate for collecting data on your outcomes and indicators.		
Record Review (internal or external)	Yes	No
11. Do you have records, reports, logs or other systematic ways that you track things in your program or services?		
12. If an information system exists, are the data consistently entered into it in a timely way?		
13. If a system exists, can information be extracted from it easily?		
14. Are there reports or other documents that you can review or		

Checklist for Selecting Data Collection Methods		
scan for data? (For example, annual reports from other organizations or sectors, labour market reports, etc.)		
If you have answered YES to questions #11, 12 and 13, internal record review may be appropriate for collecting data on your outcomes and indicators. If you answered yes to question 1,4 then an external record review may be appropriate for collecting data on your outcomes and indicators.		

Creating a Plan

How often do you need to collect data and who is responsible for collecting the data? As you are deciding which data collection methods will work best, you also need to think about timing and responsibility – when or how often will you collect data and who will collect the data. Both of these have resource implications in terms of time, staffing and funding. A detailed plan will help you determine the input requirements of each of your measurement approaches.

On the next page, you'll find a sample outcome measurement plan (with some sample information provided). You'll also find a blank plan in Chapter 5.

<table>
<tr><th colspan="3">Outcome measurement plan[4]</th></tr>
<tr><td colspan="2">OUTCOME:
Resource development contributes to an increase in continuous improvement for support organizations[5]</td><td>INDICATOR:
• # of practitioners who report using information from a specific resource</td></tr>
<tr><td>WHAT DATA COLLECTION METHOD?</td><td colspan="2">• Survey
• Resource evaluation</td></tr>
<tr><td>WHEN WILL DATA BE COLLECTED?</td><td colspan="2">Three months after resource is distributed to the field
AND/OR
As part of organization's annual survey</td></tr>
<tr><td>WHO WILL COLLECT DATA?</td><td colspan="2">Project evaluator (fee for service)

Organization staff (when data is collected as part of annual survey process)</td></tr>
<tr><td>WHAT WILL THEY DO?</td><td colspan="2">Create survey questions and/or resource evaluation document</td></tr>
<tr><td>HOW WILL DATA COLLECTED BE MONITORED?</td><td colspan="2">Web-based survey

Staff will track web-based survey response and completion rates and determine if additional follow-up is needed

Staff will send email reminders to practitioners to remind them to send in (via email) resource evaluation forms</td></tr>
</table>

[4] Adapted from: *Measuring Outcomes*. National Resource Centre (U.S. Department of Health and Human Services), undated publication. Retrieved from www.acf.hhs.gov/programs/ocs/ccf/resources/toolkit.html#gbks January 2010.

[5] Taken from the logic model for the TCU service function #4: "Develop and provide accessible and quality resources that support TCU-funded agencies to deliver LBS program". See Appendix 1 for the complete logic model and performance indicators for this service function (revised March 2010).

Performance Indicators

"What measurable evidence will you use to show that you have achieved the outcome/results listed in section D?"

~ TCU Business Plan (2010)

Are logic models and performance indicators magic bullets? Of course they aren't. Are the logic models and sample indicators perfect at this point in time? No, they aren't. What you should see, however, are templates you can use to create logic models and set performance indicators that work for you.

In Phase 1, the logic models were developed as a way to look at the work that support organizations do for the funding they receive from the Ministry of Training, Colleges and Universities (TCU). The framework *should be seen* as an opportunity to describe to TCU what it is you do, given a certain set of circumstances (the service functions) and based on a set of assumptions about the 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 (2008) 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 multidimensional issues or problems.

Together the logic models and performance indicators create a framework, but one that isn't rigid. In Phase 2, two of the Phase 1 logic models were revised and a logic model for the new service function was created. Each of the revised logic models was reviewed by the Phase 2 advisory team and each one was determined to be a reasonable "picture" of the service function. Work on the third logic model was started during a two-day workshop held in June 2010 and finalized after the workshop.

In this Chapter we've provided outcome statements, performance indicators and suggested measurement tools for these three logic models. In Chapter 5 you'll some find sample measurement tools. You'll find the complete logic models and performance indicators for these service functions in Appendix 1.

In Appendix 2 you'll find the logic model for the service function that was not revised during Phase 2. With it are questions and reflection sheets that you can use to make the logic model become a better fit with the work that your organization does in Ontario.

Service Function #2: Provide support for ministry led initiatives using a model of continuous improvement

Key Performance Indicators & Measures

Immediate Outcomes	Performance Indicators	Measurement Tools
1. Support organizations have a better understanding of TCU initiatives/priorities	Support organization's annual business plan reflects TCU priorities	• Organization's Business Plan
	Support organization's priorities are based on consultation and collaboration with pertinent stakeholders	• Organization's Business Plan
	Process for prioritizing TCU initiatives/ priorities is clearly articulated and documented	• Organization's Business Plan • Practitioner/Program Survey (annual/ semi-annual)
2. Data collection and analysis contributes to an increase in continuous improvement for support organizations and delivery agencies	Change in organization's results is documented in program monitoring report	• Funder monitoring and evaluation report
	% of funder statistical targets achieved	
3. Support organizations are a key component in TCU led initiatives/priorities	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)

Service Function #2: Provide support for ministry led initiatives using a model of continuous improvement

Key Performance Indicators & Measures

Intermediate Outcomes	Performance Indicators	Measurement Tools
1. Service delivery is more responsive to the needs of adults	# of collaborations with other EO agencies	• Organization's Annual Report
	100% of funder set statistics achieved	
2. Literacy service delivery agencies and support organizations work together to provide a training and employment system that is more *responsive* to TCU initiatives/priorities	# and type of partnerships between support and delivery organizations	• Practitioner/Program Survey (annual/ semi-annual)
	# and type of partnerships between delivery agencies within a region or catchment area	
	# of partnerships brokered with employers	
	% of practitioners who report making changes to program management	
	% of practitioners who report making changes to program design and/or delivery	

Service Function #2: Provide support for ministry led initiatives using a model of continuous improvement

Key Performance Indicators & Measures

	% of LBS agencies that indicate they have increased their ability to be responsive to the needs of adult learners	
	Decrease in % of adult learners not being served	
Impact Outcomes	**Performance Indicators**	**Measurement Tools**
1. Governments have better information on which to base their funding and policy decisions	Funding from provincial government is adequate for current and future identified needs and priorities	• Support organizations' Annual Reports
2. Delivery agencies have better information on which to base programming decisions	% of LBS agencies that indicate they have increased their ability to be responsive to the needs of adult learners	• Practitioner/Program Survey or needs assessment (annual/semi-annual)
	Decrease in % of adult learners not being served	

Service Function #4: Develop and provide accessible, quality resources that support LBS-funded agencies to deliver a quality LBS program

Key Performance Indicators & Measures

Immediate Outcomes	Performance Indicators	Measurement Tools
1. 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 distributed by hard copy and/or Internet	• Agency Annual Report • Sales/distribution records • Website data analysis (monthly)
2. LBS delivery agencies' capacity to support LBS learners is increased	% of practitioners who report an increase in confidence to teach % of practitioners who report an increase in confidence to manage an LBS agency	• Practitioner/Program Survey or needs assessment (annual/semi-annual) • Pre & post training evaluations • Information/event survey • Resource evaluation
3. Within the literacy and essential skills field, skills and knowledge of practitioners is increased	% of LBS practitioners consulted during resource development	• Resource acknowledgements section
	# of practitioners who participated in resource development	• Resource acknowledgements section • Project reports

Service Function #4: Develop and provide accessible, quality resources that support LBS-funded agencies to deliver a quality LBS program		
Key Performance Indicators & Measures		
	# of training events or information sessions delivered in partnership with other support organizations	• Agency Annual Report and/or LSP report
4. Resource development contributes to an increase in continuous improvement for both support organizations and delivery agencies	# of practitioners who report using information from a specific resource	• Practitioner/Program Survey or needs assessment (annual/semi-annual) • Pre & post training evaluations • Information/event survey • Resource evaluation
	% of practitioners who report an increase in knowledge of specific topic/issue	
Intermediate Outcomes	**Performance Indicators**	**Measurement Tools**
1. Support organization's ability to work within the EO system is increased	# of documented communication activities between support organization and other EO agencies	• Minutes of meetings attended by staff from LBS support organizations and/or LBS delivery agencies • Organization's Annual Report
	# and type of resources developed in response to identified needs	
	# and type of resources accessed by LBS	

Service Function #4: Develop and provide accessible, quality resources that support LBS-funded agencies to deliver a quality LBS program **Key Performance Indicators & Measures**		
	agencies	
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	• Practitioner/Program Survey or needs assessment (annual/semi-annual) • Resource evaluation
	% of practitioners who report using resources to make changes to program evaluation	
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	• Practitioner/Program Survey or needs assessment (annual/semi-annual) • Resource evaluation
	% of practitioners who report using resources to make changes to program evaluation	
4. Within the LBS field, skills and knowledge of practitioners is increased	% of practitioners who report using skills and knowledge from resource with	• Practitioner/Program Survey or needs

Service Function #4: Develop and provide accessible, quality resources that support LBS-funded agencies to deliver a quality LBS program		
Key Performance Indicators & Measures		
	learners	assessment (annual/semi-annual)
	% of practitioners who report using resources with learners	
	% of practitioners who report an increase in confidence when working with adult learners	
Impact Outcomes	**Performance Indicators**	**Measurement Tools**
1. Support organization's ability to help LBS funded delivery agencies achieve expected results is increased	% of LBS agencies that indicate they have increased their ability to be responsive to the needs of adult learners	• Practitioner/Program Survey or needs assessment (annual/semi-annual)
	Decrease in % of adult learners not being served	

Service Function #3: Develop and provide quality resources that support TCU-funded agencies to deliver E-Channel Learning

Key Performance Indicators & Measures

Immediate Outcomes	Performance Indicators	Measurement Tools
1. 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 distributed by hard copy and/or Internet	• Agency Annual Report • Sales/distribution records • Website data analysis (monthly)
2. LBS delivery agencies' capacity to support LBS learners is increased	% of practitioners who report an increase in confidence to teach or deliver service	• Practitioner/Program Survey or needs assessment (annual/semi-annual) • Pre & post training evaluations • Information/event survey • Resource evaluation
	% of practitioners who report an increase in confidence to manage LBS agency	
3. Within the literacy and essential skills field, skills and knowledge of practitioners is increased	% of LBS practitioners consulted during resource development	• Resource acknowledgements section • Project reports • Agency Annual Report and/or LSP report
	# of practitioners who participated in resource development	

Service Function #3: Develop and provide quality resources that support TCU-funded agencies to deliver E-Channel Learning

Key Performance Indicators & Measures

	# of training events or information sessions delivered in partnership with other support organizations	
4. Resource development contributes to an increase in continuous improvement for both support organizations and delivery agencies	# of practitioners who report using information from a specific resource	• Practitioner/Program Survey or needs assessment (annual/semi-annual) • Pre & post training evaluations • Information/event survey • Resource evaluation
	% of practitioners who report an increase in knowledge of specific topic/issue	
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	• Minutes of meetings attended by staff from LBS support organizations and/or LBS delivery agencies • Organization's Annual Report
	# and type of resources developed in response to identified needs	
	# and type of resources accessed by LBS agencies	

Service Function #3: Develop and provide quality resources that support TCU-funded agencies to deliver E-Channel Learning Key Performance Indicators & Measures		
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 E-Channel Learning program design and/or delivery % of practitioners who report using resources to make changes to program evaluation	• Practitioner/Program Survey or needs assessment (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 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 or needs assessment (annual/semi-annual) • Resource evaluation
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	• Practitioner/Program Survey or needs assessment (annual/semi-annual)

Service Function #3: Develop and provide quality resources that support TCU-funded agencies to deliver E-Channel Learning

Key Performance Indicators & Measures

	in confidence when working with adult learners	
Impact Outcomes	**Performance Indicators**	**Measurement Tools**
5. Support organization's ability to help LBS funded delivery agencies achieve expected results is increased	% of LBS agencies that indicate they have increased their ability to be responsive to the needs of adult learners using E-channel Learning	• Practitioner/Program Survey or needs assessment (annual/semi-annual)
	Decrease in % of adult learners not being served	

Performance Measurement Tools

"Done well, performance measurement helps programs tell their stories and can also help drive program improvement."

~ What Gets Measured, Gets Done

In this section you'll find examples of most of the performance measurement tools mentioned in this document. Many of these tools were created using tools already being used by support organizations in Ontario. Some of the tools mentioned can be found in the Phase 1 report.

Outcome measurement plan[1]	
OUTCOME:	**INDICATOR:**
WHAT DATA COLLECTION METHOD?	
WHEN WILL DATA BE COLLECTED?	
WHO WILL COLLECT DATA?	
WHAT WILL THEY DO?	
HOW WILL DATA COLLECTED BE MONITORED?	

[1] Adapted from: *Measuring Outcomes*. National Resource Centre (U.S. Department of Health and Human Services), undated publication. Retrieved from www.acf.hhs.gov/programs/ocs/ccf/resources/toolkit.html#gbks January 2010.

Annual Evaluation Survey

While this survey is divided into the key services provided by a regional network, it can be adapted to the key services provided by any support organization.

Annual Organization Evaluation Survey[2]

You will be given a series of statements under each function. Please identify which statement best represents your experience with the network.

1. The position I hold at my agency is

☐ Manager ☐ Executive Director ☐ Coordinator ☐ Instructor ☐ Other

If other, please describe:

2. I have been in this position

☐ More than 10 years ☐ 6-10 years ☐ 1-5 years ☐ Less than one year

Service #1: The network facilitates a regional literacy planning process that brings together local literacy administrators.						
	Strongly Agree	Agree	Somewhat Agree	Disagree	Strongly Disagree	N/A
1. I am aware that this is a role of the network.						
2. I see value in this function of the network.						
3. The focus of the meetings suits my needs.						
4. The frequency of the meetings suits my needs (every two months).						

[2] Adapted from a survey created by Literacy Link Niagara. Used with permission.

Service #1: The network facilitates a regional literacy planning process that brings together local literacy administrators.						
	Strongly Agree	Agree	Somewhat Agree	Disagree	Strongly Disagree	N/A
5. The length of the meetings suits my needs (3 hours).						
6. The format of the meetings achieves the purposes of the planning process.						
7. I believe the network fulfills this function well.						
8. Do you have any comments on the literacy services planning process?						
9. Do you have any suggestions for improving the literacy services planning process?						

Service #2: The network creates a yearly Literacy Services Plan document that demonstrates coordination of LBS services across our region, collectively determining how services should respond to identified needs by deciding which agencies should be serving which needs.						
	Strongly Agree	Agree	Somewhat Agree	Disagree	Strongly Disagree	N/A
1. I am aware that this is a role of the network.						
2. I see value in this function of the network.						
3. The format of the document is appropriate.						

Service #2: The network creates a yearly Literacy Services Plan document that demonstrates coordination of LBS services across our region, collectively determining how services should respond to identified needs by deciding which agencies should be serving which needs.						
	Strongly Agree	Agree	Somewhat Agree	Disagree	Strongly Disagree	N/A
1. The process of collecting the information is appropriate.						
2. The content of the document achieves its purpose.						
3. I use the LSP document in my program.						
4. I believe the network fulfills this function well.						
5. Do you have any comments on the Literacy Service Plan document?						
6. Do you have any suggestions for improving the LSP document?						

Service #3: The network provides literacy information to the public at large, including local literacy issues, literacy data and literacy program information. The network also refers potential learners to the most appropriate services in our region.						
	Strongly Agree	Agree	Somewhat Agree	Disagree	Strongly Disagree	N/A
1. I am aware that this is a role of the network.						
2. I see value in this function of the network.						

Service #3: The network provides literacy information to the public at large, including local literacy issues, literacy data and literacy program information. The network also refers potential learners to the most appropriate services in our region.						
	Strongly Agree	Agree	Somewhat Agree	Disagree	Strongly Disagree	N/A
3. I am confident that the network is able to provide the public with literacy information.						
4. I am confident that the network is able to direct potential learners to the appropriate LBS program.						
5. I believe the network fulfills this function well.						
6. Do you have any comments on the information and referral services provided by the network?						
7. Do you have any suggestions for improving the information and referral service?						

Service #4: The network facilitates communication between the Ministry of Training, Colleges and Universities and the LBS agencies, and between the LBS agencies themselves. The network also forwards/provides information on new resources, funding opportunities and information updates from other sources, via email.						
	Strongly Agree	Agree	Somewhat Agree	Disagree	Strongly Disagree	N/A
1. I am aware that this is a role of the network.						
2. I see value in this function of the network.						
3. The methods of communication suit my needs (face-to-face, email, phone, fax).						

Service #4: The network facilitates communication between the Ministry of Training, Colleges and Universities and the LBS agencies, and between the LBS agencies themselves. The network also forwards/provides information on new resources, funding opportunities and information updates from other sources, via email.						
	Strongly Agree	Agree	Somewhat Agree	Disagree	Strongly Disagree	N/A
4. I believe the network fulfills this function well.						
5. Do you have any comments on the communication process?						
6. Do you have any suggestions for improving the communication process?						

Service #5: The network provides advice and information to help link our region's literacy system to external organizations related to adult literacy (Justice, Health, Employment, Poverty, etc.).						
	Strongly Agree	Agree	Somewhat Agree	Disagree	Strongly Disagree	N/A
1. I am aware that this is a role of the network.						
2. I see value in this function of the network.						
3. The methods of linkages suit my needs (advisory committees, public presentations, shared planning tables).						
4. I believe the network fulfills this function well.						
5. Do you have any comments on the external linkages function?						
6. Do you have any suggestions for improving the external linkages function?						

Service #6: The network provides training and professional development for administrators and front line practitioners.						
	Strongly Agree	Agree	Somewhat Agree	Disagree	Strongly Disagree	N/A
1. I am aware that this is a role of the network.						
2. I see value in this function of the network.						
3. The network professional development events are well organized.						
4. The network professional development events were useful to my program.						
5. I believe the network fulfills this function well.						
6. Do you have any comments on the network's professional development events?						
7. Do you have any suggestions for improving the network's professional development events?						

Thank you for completing this survey.

Sample Workshop Evaluation

This is typical pre- and post-workshop evaluation.

<u>WORKSHOP EVALUATION</u>

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 TCU expectations in relation to today's workshop subject as:

   1 2 3 4
   low high

Complete the other side "Section 2: Post-Workshop" after the 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 a 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 as:

    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.)

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

Follow-Up Questionnaire[3]

Follow-Up Questionnaire for Workshop Participants

1. **Sector:**
   - ☐ Community-based LBS
   - ☐ School board LBS
   - ☐ College LBS
   - ☐ Employment Training
   - ☐ Other:____

2. **How much time has elapsed since you participated in the training session?**
   - ☐ Less than 3 months
   - ☐ More than 3 months

3. **Below are six stages: What stage do you think you were at before attending the training?**
   - ☐ 1. Awareness
   - ☐ 2. Information Gathering
   - ☐ 3. Impact Reflection
   - ☐ 4. Preparing for Change
   - ☐ 5. Program Implementation
   - ☐ 6. Exploration and Collaboration
   - ☐ Unsure

4. **Based on changes you have made as a result of your participation in the training and the materials you have received, 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

[3] Based on a survey sample included in the Phase 1 report.

Follow-Up Questionnaire for Workshop Participants

5. **Please check any reasons for not making any changes based on the training and materials you have received. 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

Follow-Up Questionnaire for Workshop Participants
8. What further supports, materials, or 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. Please use the enclosed stamped envelope to send us your responses.

Checklist for Selecting Data Collection Methods

A checklist can help you decide which data collection methods are most appropriate for your outcome measurement. Below is one example of a checklist.

Checklist for Selecting Data Collection Methods [4]		
Surveys	Yes	No
1. Do I need data from the perspective of the participant or recipient?		
2. Do I have a way to get information from these individuals in a systematic way?		
3. Do I need data that are standardized so that statistical comparisons can be made? (For example, will I need to report percents or other statistics?)		
4. Will participants be able to understand the survey questions? (Consider age, cultural backgrounds, etc.)		
5. Do participants have the necessary knowledge or awareness to accurately answer questions about the outcomes?		
If you have answered YES to questions #1 through 5, surveys may be appropriate for collecting data on your outcomes and indicators.		
Interviews	Yes	No
6. Are more in-depth answers necessary to adequately measure the indicators or to get information on what is needed or what should change?		
7. Will it be necessary for someone to personally ask participants questions (either on the phone or in person) in order to collect the information related to this outcome?		
If you have answered YES to questions #6 and 7, interviews may be appropriate for collecting data on your outcomes and indicators.		

[4] Adapted from: *Measuring Outcomes*. National Resource Centre (U.S. Department of Health and Human Services), undated publication. Retrieved from www.acf.hhs.gov/programs/ocs/ccf/resources/toolkit.html#gbks January 2010.

Checklist for Selecting Data Collection Methods		
Observation	Yes	No
8. Is it difficult to accurately measure the indicators by asking people questions about opinions or perceptions?		
9. Can this outcome or indicator be assessed accurately by someone trained to observe it in action — can something actually be observed?		
10. Do you have the staff resources for someone to observe events, conditions, interactions or behaviours?		
If you have answered YES to questions # 8, 9 and 10, observation may be appropriate for collecting data on your outcomes and indicators.		
Record Review (internal or external)	Yes	No
11. Do you have records, reports, logs or other systematic ways that you track things in your program or services?		
12. If an information system exists, are the data consistently entered into it in a timely way?		
13. If a system exists, can information be extracted from it easily?		
14. Are there reports or other documents that you can review or scan for data? (For example, annual reports from other organizations or sectors, labour market reports, etc.)		
If you have answered YES to questions #11, 12 and 13, internal record review may be appropriate for collecting data on your outcomes and indicators. If you answered yes to question 14, then an external record review may be appropriate for collecting data on your outcomes and indicators.		

Appendix 1: Modified Logic Models

"A performance framework can help you be clear about the benefits of the work that you are doing — and that can translate into giving a clear picture of your achievements—internally and externally. If you can demonstrate your value to the overall "system", then you should be in a better position to "make your case" when limited resources are being re-allocated."

~ Building a Performance Framework for LBS support Organizations, Phase 1

Are logic models and performance indicators magic bullets? Absolutely not. Are the logic models and sample indicators in this document perfect? Absolutely not. What you should see them as is templates—a resource from which you can start or continue your performance management journey.

In Phase 1, the logic models were developed as a way to look at the work that support organizations do for the funding they receive from the Ministry of Training, Colleges and Universities (TCU). 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 the 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 multidimensional issues or problems.

The logic models and performance indicators have been created as *living drafts.* Together they create a framework, but one that isn't rigid. In Phase 2, two of the logic models created in Phase 1 were revised and a new logic model for a new service function was created.

Each of the revised logic models was reviewed by the Phase 2 advisory team and each one was determined to be a reasonable "picture" of the service function. The third logic model was worked on during a two-day workshop held in June 2010. These three logic models and their performance indicators are provided in this appendix.

In Appendix 2 you'll find the logic model and indicators for part of the service function (#1) that was not revised during Phase 2. With it are question and reflection sheets that you can use to make the logic model become a better fit with the work that your organization does in Ontario. You can access the complete logic model for this service function by going to www.projectread.ca/publications and scrolling down to the link to *Building a Performance Framework for LBS Support Organizations in Ontario.*

Service Function #2: Provide support for ministry led initiatives using a model of continuous improvement

Assumptions

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

1. MTCU initiatives/priorities are identified through a ministry planning process that reflects larger TCU planning and directions.
2. MTCU initiatives/priorities are communicated to support organizations through the annual business plan development and by special communications to the field.
3. Ideally, TCU's rationale for an initiative or priority area is described in a clear, uniform manner to all service support organizations.
4. Ideally, TCU provides sufficient resources (monetary and human) to allow for implementation of initiatives (new and/or ongoing) across regions, sectors and/or streams.
5. Support organizations provide information about and/or training for TCU initiatives/priorities in a positive and supportive manner.
6. Support activities related to a specific initiative or priority area are developed based on information available at a particular point in time.
7. As a result of their role in TCU led initiatives, support organizations gain skills and expertise that increase their profile within the ministry and with the community they serve.

Service Function #2: Provide support for ministry led initiatives using a model of continuous improvement

Logic Model

Inputs	Outputs		Outcomes
	Activities	**Results**	**Immediate, Intermediate & Impact**
1. Qualified staff (support organization) 2. Resources (materials, funding, research/ information) 3. Clear information from TCU	1. Analyze data from annual scan/survey 2. Identify priorities 3. Identify opportunities to collaborate and build and maintain partnerships 4. Identify best approach for disseminating information about TCU initiatives/priorities to service delivery agencies and others and back to TCU	1. LBS agencies receive support (information/ training) they need 2. Opportunities for partnering/ collaboration identified 3. Support organizations provide TCU with up-to-date feedback about the roll out of TCU initiatives/priorities 4. Support organizations develop expertise	**Immediate** (Learning: changes in awareness, knowledge, attitude, opinions, motivation) 1. Support organizations have a better understanding of TCU initiatives/priorities and how to support them 2. Data collection and analysis contributes to an increase in continuous improvement for both support organizations and delivery agencies 3. Support organizations are a key component in TCU led initiatives/priorities **Intermediate** (Action: changes in behaviours, practices, decision-making, policies) 1. Service delivery is more responsive to the needs of adults 2. Literacy service delivery agencies and support organizations work together to provide a training and employment system that is more *responsive* to TCU

Service Function #2: Provide support for ministry led initiatives using a model of continuous improvement

Logic Model

Inputs	**Outputs**		**Outcomes**
	Activities	**Results**	**Immediate, Intermediate & Impact**
			initiatives/priorities **Impact** (Social Change: changes in reputation, position, funding, opportunities, learner satisfaction) 1. Governments have better information on which to base their funding and policy decisions 2. Delivery agencies have better information on which to base programming decisions

Service Function #4: Develop and provide accessible, quality resources that support TCU-funded agencies to deliver LBS program

Assumptions

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.

Service Function #4: Develop and provide accessible, quality resources that support TCU-funded agencies to deliver LBS program

Logic Model

Inputs	Outputs		Outcomes
	Activities	**Results**	**Immediate, Intermediate & Impact**
1. Staff (support organization) 2. Resources (materials, funding, information)	1. Conduct annual scan/survey to identify gaps, priorities and needs 2. Consult with stakeholders 3. Design and develop resources 4. Design and develop dissemination plan	1. Key resources are created and distributed to TCU funded agencies and others as required 2. Resources developed are reflective of agency needs	**Immediate** (Learning: changes in awareness, knowledge, attitude, opinions, motivation) 1. Support organization's capacity to support LBS delivery agencies is increased 2. LBS delivery agencies' capacity to support LBS learners is increased 3. Resource development contributes to an increase in continuous improvement for both support organizations and delivery agencies 4. Within the literacy and essential skills field, the skills and knowledge of practitioners is increased **Intermediate** (Action: changes in behaviours, practices, decision-making, policies) 1. Support organization's status within EO system is increased

Service Function #4: Develop and provide accessible, quality resources that support TCU-funded agencies to deliver LBS program Logic Model			
Inputs	**Outputs**		**Outcomes**
	Activities	**Results**	**Immediate, Intermediate & Impact**
			2. Literacy service delivery agencies and support organizations work together to provide a *coordinated* training and employment system based on identified community needs 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 **Impact** (Social Change: changes in reputation, position, funding, opportunities, learner satisfaction) 1. Support organizations help LBS funded delivery agencies achieve expected results

Service Function #3: Develop and provide quality resources that support TCU-funded agencies to deliver E-Channel Learning

Assumptions

The support organization is committed to enhancing the field's ability to provide quality E-Channel learning 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): research, tools (such as referral protocols, best practices or common/shared approaches that enhance LBS service delivery of E-Channel learning) and information bulletins.

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 support organizations to develop the capacity to support the development of E-Channel learning resources.

Service Function#3: Develop and provide quality resources that support TCU-funded agencies to deliver E-Channel Learning.

Logic Model

Inputs	Outputs		Outcomes
	Activities	Results	Immediate, Intermediate & Impact
1. Staff (support organization) 2. Resources (materials, funding, information)	1. Conduct annual scan/survey to identify E-Channel Learning gaps, priorities and needs 2. Consult with stakeholders 3. Design and develop resources 4. Design and develop dissemination plan	1. E-Channel learning resources are created and distributed to TCU funded agencies and others as required 2. Resources developed are reflective of identified needs	**Immediate** (Learning: changes in awareness, knowledge, attitude, opinions, motivation) 1. Support organization’s capacity to support LBS delivery agencies is increased 2. LBS delivery agencies’ capacity to support LBS learners is increased 3. Resource development contributes to an increase in continuous improvement for both support organizations and delivery agencies 4. Within the literacy and essential skills field, the skills and knowledge of practitioners is increased **Intermediate** (Action: changes in behaviours, practices, decision-making, policies) 1. Support organization’s status within EO system is increased

Service Function#3: Develop and provide quality resources that support TCU-funded agencies to deliver E-Channel Learning.

Logic Model

Inputs	Outputs		Outcomes
	Activities	**Results**	**Immediate, Intermediate & Impact**
			2. Literacy service delivery agencies and support organizations work together to provide a *coordinated* training and employment system based on identified community needs 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 **Impact** (Social change: changes in reputation, position, funding, opportunities, learner satisfaction) 1. Support organizations help LBS funded delivery agencies achieve expected results

Appendix 2: Unrevised Logic Model

In this appendix you'll find the logic model for the community planning section of the service function that was not revised during Phase 2. This is the service function that says that you will "Support TCU-funded delivery agencies to deliver coordinated, quality LBS services responsive to emerging needs (identified by the community and government) within an integrated employment and training system."

In Phase 1, this service function was divided into three sections: Community planning, Outreach and Networking.

With this part of the logic model you will find questions and reflection sheets that you can use to make the logic model become a better fit for your organization. Once you have reviewed and revised the Community Planning section of the logic model, you'll have to review and revise the performance indicators, and then move on to revising the Outreach and Networking sections.

Service Function #1: Support TCU-funded delivery agencies to deliver coordinated, quality LBS services responsive to emerging needs (identified by the community and government) within an integrated employment and training system

ASSUMPTIONS

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

- Community planning
- Outreach
- Networking

(Note: only the community planning assumptions are presented here. Please refer to the Phase 1 report for the complete set of assumptions)

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 TCU-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.

Service Function #1: Support TCU-funded delivery agencies to deliver coordinated, quality LBS services responsive to emerging needs (identified by the community and government) within an integrated employment and training system ASSUMPTIONS
➲ 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 TCU based on annual guidelines set by TCU. 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 identified 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 TCU-funded programs will ensure an integrated training and employment system across the province. 8. All TCU-funded delivery organizations and other key stakeholders inside and outside the EO system participate in the

Service Function #1: Support TCU-funded delivery agencies to deliver coordinated, quality LBS services responsive to emerging needs (identified by the community and government) within an integrated employment and training system ASSUMPTIONS
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 Boards. *Questions for reflection: Are the assumptions that were made in 2008 still valid? Are there assumptions missing?*

Service Function #1 Support TCU-funded delivery agencies to deliver coordinated, quality LBS services responsive to emerging needs (identified by the community and government) within an integrated employment and training system

COMMUNITY PLANNING LOGIC MODEL

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 is grounded in a solid decision making process 4. Actions taken as a result of LSP reports led to improved services for adults	**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 are 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

Service Function #1 Support TCU-funded delivery agencies to deliver coordinated, quality LBS services responsive to emerging needs (identified by the community and government) within an integrated employment and training system

COMMUNITY PLANNING LOGIC MODEL

Inputs	Outputs		Outcomes
	Activities	**Results**	**Immediate, Intermediate & Impact**
	process 6. Data is collected from key constituents 7. Priorities are set based on available data and a clearly identified process 8. Information sharing 9. Evaluation format and protocols developed 10. Provincial umbrella and sector organizations review and analyze LSP reports	5. Changes in service and/or management processes 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	support organizations work together to provide a *coordinated* training and employment system based on identified community needs 2. Literacy service delivery agencies and support organizations work together to provide a training and employment system that is more *responsive* to identified 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

Service Function #1 Support TCU-funded delivery agencies to deliver coordinated, quality LBS services responsive to emerging needs (identified by the community and government) within an integrated employment and training system

COMMUNITY PLANNING LOGIC MODEL

Inputs	Outputs		Outcomes
	Activities	**Results**	**Immediate, Intermediate & Impact**
		identify their niches in the EO training and employment system	results 3. Literacy and essential skills emerge as major issues at other community planning tables

Revising Service Function #1

<table>
<tr><th colspan="2">Service Function #1: Support TCU-funded delivery agencies to deliver coordinated, quality LBS services responsive to emerging needs (identified by the community and government) within an integrated employment and training system

Community Planning</th></tr>
<tr><td>Inputs created in 2008</td><td>My Revisions</td></tr>
<tr><td>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)</td><td></td></tr>
</table>

Service Function #1: Support TCU-funded delivery agencies to deliver coordinated, quality LBS services responsive to emerging needs (identified by the community and government) within an integrated employment and training system. Community Planning	
Activities created in 2008	My Revisions
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 process 6. Data is collected from key constituents 7. Priorities are set based on available data and a clearly identified process 8. Information sharing 9. Evaluation format and protocols developed 10. Provincial umbrella and sector organizations review and analyze LSP reports	

Service Function #1: Support TCU-funded delivery agencies to deliver coordinated, quality LBS services responsive to emerging needs (identified by the community and government) within an integrated employment and training system. Community Planning	
Results created in 2008	My Revisions
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 is grounded in a 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 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 identify their niches in the EO training and employment system	

<table>
<tr><th colspan="2">Service Function #1: Support TCU-funded delivery agencies to deliver coordinated, quality LBS services responsive to emerging needs (identified by the community and government) within an integrated employment and training system.

Community Planning</th></tr>
<tr><td>Outcomes created in 2008</td><td>My Revisions</td></tr>
<tr><td>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 are 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 identified community needs
2. Literacy service delivery agencies and support</td><td></td></tr>
</table>

Service Function #1: Support TCU-funded delivery agencies to deliver coordinated, quality LBS services responsive to emerging needs (identified by the community and government) within an integrated employment and training system. Community Planning	
Outcomes created in 2008	My Revisions
organizations work together to provide a training and employment system that is more *responsive* to identified 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	

Once you have reviewed and revised the Community Planning section of the logic model, you should review and revise the performance indicators. You'll find the logic models for the Outreach and Networking sections of this service function and all the performance indicators created in 2008 for this service function in the Phase 1 report (which you can download from www.projectread.ca).