



CENTRE FOR PUBLIC MANAGEMENT INC.
CENTRE DE GESTION PUBLIQUE INC.

Canadian Council on Learning Conseil canadien sur l'apprentissage

Formative Evaluation



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CENTRE FOR PUBLIC MANAGEMENT INC.
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Executive Summary

Background

In a rapidly-changing global economy that places greater value on skills and knowledge than ever before, effective investments in education, training, and lifelong learning are essential to ensure the future prospects and social well-being of Canadians.

The Canadian Council on Learning (CCL) is an arm's-length, not-for-profit organization created by the federal government in March 2004, with a mandate to:

- promote knowledge and information exchange among learning partners;
- inform Canadians regularly of Canada's progress in learning; and
- address knowledge gaps and provide evidence-based information to improve investments along the full span of lifelong learning on a pan-Canadian basis.

The scope of CCL's activities encompasses the continuum of lifelong learning. This includes information about learning throughout all stages of life (childhood, youth and adulthood), in many settings (home, classroom, community and workplace), and in different forms (structured, self-directed learning, and learning by doing).

CCL is an independent, objective, and authoritative source of practical and relevant information for all Canadians. It is designed to add value and not duplicate the work of other organizations and governments. CCL collaborates with existing institutions, organizations, and networks to build on its work. It recognizes and takes into consideration the range and varied needs of users of learning information, including individuals, families, communities, business and labour, institutions, voluntary organizations, and governments.

Organization, Structure, Resources and Mandate

CCL has a pan-Canadian perspective. It has offices in Ottawa and Vancouver, and its knowledge centres (KCs) are located in each of the five regions of the country.

CCL has been in existence for two and a half years. At this time it has fewer than fifty staff members and has expended approximately \$22 million of its original \$85 million.



To achieve its mandate, CCL:

- 1) Informs Canadians regularly about Canada's progress on learning outcomes through such means as:
 - A comprehensive, integrated set of pan-Canadian indicators that measures progress on outcomes across the continuum of lifelong learning;
 - The filling of key knowledge, information, and data gaps on learning; and
 - The preparation and dissemination of regular and accessible information and reports targeted to the range of users of learning information.
- 2) Promotes knowledge and information exchange among learning partners through such means as:
 - Partnering with existing organizations with expertise in the different areas of lifelong learning;
 - Supporting effective practices in all areas of lifelong learning via analyses, studies, and synthesis of information and dissemination of results; and
 - Supporting access to data and other learning information among the public, researchers, learning organizations, and governments.

Evaluation Questions and Scope

This evaluation addresses the following questions:

1. To what extent have CCL's corporate goals been refined into specific objectives, operations, and outcomes?
2. To what extent are CCL's intended audiences, resources, activities, and outcomes consistent with its goals and with one another?
3. To what degree is CCL 'on track' in achieving its outcomes for the five-year time period ending March 2009?
 - From an **infrastructure** perspective: Does CCL have the right human resources in place, and has it set up other appropriate processes and systems?
 - From a **results** perspective: Given that it is in its early stages, has CCL progressed as expected, and is it likely to achieve its expected outcomes?

The evaluation answers these questions primarily by analyzing interviews conducted in person or by telephone. The sample of respondents was selected in order to be representative of those involved in the design, delivery, and 'receipt' of CCL activities, and because they were in a position to provide a credible perspective on each of the evaluation questions.

In addition, four of the five knowledge centre (KC) coordinators were interviewed. Finally, a sample of forty KC members were interviewed or surveyed by e-mail.



Again, these interviewees were selected because they were knowledgeable, credible, and representative of the design and delivery of the KC activities.

In total, ninety-one interviews were conducted, about one-third in person, one-third by telephone, and one-third via e-mail.

In addition to the interviews, a case study was conducted on a synthesis of research. Finally, comparisons were made with similar 'foundations' or 'arm's-length' organizations funded by the federal government.

Analyses of this information and these data were primarily qualitative. The federal government's Management Accountability Framework provided some guidance on developing the criteria used for assessing the management of several of CCL's key internal functions. We also used other generally accepted criteria for conducting a research synthesis.

The evaluation was conducted during the summer of 2006. The scope of the evaluation encompassed all CCL products and plans as of that time. We did not conduct a detailed review of all activities and products, but concentrated on key internal processes such as people, stewardship, and governance, as well as key internal analytical processes such as producing summaries of research findings.

Our analyses focused on the four knowledge centres that had been in operation for a year by the time of our evaluation. We did not examine CCL's Communications and Outreach function, as it underwent a significant change during the summer, culminating in a strategy paper in September, 2006.

Evaluation question 1: To what extent have CCL's corporate goals been refined into specific objectives, operations, and outcomes?

Conclusion: CCL's objectives and intended outcomes are consistent with the original goals and outcomes reflected in the relevant articles of the Funding Agreement and the interpretation of those as outlined in CCL's logic model. CCL's outcomes are reasonably clear and have been articulated in internal CCL documentation and stated in communication with external stakeholders.

CCL's operations that support the attainment of these objectives and outcomes have been developed and largely implemented over the past 12 months. It is expected that all the necessary resources needed to carry out CCL's operations will be in place by autumn 2006.

Evaluation question 2: To what extent are CCL's intended audiences, resources, activities and outcomes consistent with its goals and with one another?

Conclusion: We found that the intended audiences, resources, and activities are consistent with CCL's goals. Further, they are generally consistent with each other, both in strategy and in level and type of resources consumed. This



conclusion is based on the findings from interviews with the key stakeholders involved in CCL's design and delivery (CCL staff, KC coordinators, management and members) and in CCL activities (other NGOs, provinces, territories and individuals).

Evaluation question 3: To what degree is CCL 'on track' in achieving its outcomes for the five-year time period ending March 2009?

- a) From an **infrastructure** perspective: Does CCL have the right human resources in place and has it set up other appropriate processes and systems?
- b) From a **results** perspective: Given that it is in its early stages, has CCL progressed as expected and is it likely to achieve its expected outcomes?

Conclusion: Infrastructure. Based on our analysis, CCL is in the final stages of designing and implementing appropriate management and administrative systems and processes. These tasks are expected to be largely finished by the end of 2006, and will require only minor modifications over the next year.

Conclusion: Results. Based on the expectations of those involved in the original design of CCL, CCL has achieved the anticipated degree of progress with respect to establishing the organization and putting in place the appropriate personnel and administrative infrastructure. According to interviewees, progress in designing and developing the products and activities has also reached expected levels.

Conclusion: Is CCL likely to achieve its expected outcomes? Based on interviews and a review of documentation, we conclude that CCL largely has the infrastructure in place to achieve its intended outcomes. Further, the strategy and attendant activities and operations, as designed, appear to be consistent with achieving CCL's outcomes by 2009.

The first tangible outputs, such as the Composite Learning Index (CLI) and the knowledge centres, were developed over the past year. These, and the initial Knowledge Exchange and Research and Mobilization activities, have been well received. There is a real appetite to know the degree to which these and other activities – in particular the Post-Secondary Education report – fulfil the ambitious expectations for CCL.

Despite this progress, there is widespread acknowledgement that, with only two and a half years left in CCL's current mandate, the infrastructure is not yet fully in place. CCL recently decided to create an expanded Communications and Outreach work group and is still developing its performance monitoring capacity.



Conclusion and Recommendations

CCL has made credible and recognized progress in setting up an organization that fulfils the mandate envisioned by the 2004 Funding Agreement. This vision was of an organization that could provide independent, objective, and authoritative information that is practical and relevant for all Canadians.

CCL's executive team and most of their complement of staff are in place. Most key management practices have been designed and are being implemented. CCL has plans to modify and implement these practices over the next year. These systems are expected to be fully functional in 2007.

Significant achievements have been made in terms of developing knowledge around gaps in information about learning in Canada. These include:

- implementing regional knowledge centres around the themes of health and learning, aboriginal learning, work and learning, early childhood learning, and adult learning and setting up a regional management council and implementing their first year's plan;
- completing Canada's first Composite Learning Index; and
- presenting speeches, conferences, and workshops.

Despite this progress, three key challenges remain:

1. Deliver on what has already been designed;
2. Develop and implement a communications and outreach strategy that will help ensure that the products and events planned by CCL receive the appropriate level of exposure and consideration among CCL's stakeholders; and
3. Develop and use a performance information system that will allow CCL to track, manage, and reallocate resources to those areas that have the highest payoff in achieving CCL's objectives in the remaining two and a half years of the current mandate.

By far the greatest challenge and area of focus that is needed by CCL is to ensure that its Communications and Outreach strategy is successful. CCL needs to create the 'right environment' for its planned products. This will help ensure that CCL's initiatives support appropriate decisions about lifelong learning. Implementing an effective strategy will be the key for CCL to achieve its expected outcomes.

We recommend that CCL continue its focus on the Communications and Outreach Directorate and ensure it is a primary focus of CCL.

Management response:

CCL recognizes the critical importance of its Communications and Outreach activities. The organization is in the final stages



of updating its overall strategic communications plan, and developing detailed operational plans for the four main communications focus areas identified by CCL:

- i. Corporate and internal communications
- ii. External Stakeholder Relations
- iii. Media Relations
- iv. Government Relations

A Communications and Outreach Working Group has been formed within CCL, with each of the four focus areas headed by a Subject Matter Expert (SME). The SMEs report directly to the President and CEO, who will chair and coordinate the activities of the Working Group. It is the CEO's intention to devote more of his time to Communications and Outreach activities, particularly in the areas of Media and Government Relations, in the coming months.

Results-based management: development, implementation, refinement, and use of performance information to improve performance

Entities such as CCL, which receive the majority of their funding from the federal government, need an appropriate measurement and reporting system in order to explain the results they are achieving for the resources consumed and their particular contribution to the achievement of these results.

A logic model identifies the set of related activities and shows the chain of results connecting activities to final outcomes. It is intended to make the connections between the activities, outputs, and outcomes reasonably clear and, in doing so, to help build a results-based performance measurement system that efficiently measures the progress of each component of this results chain.

Developing performance measurement systems that reflect this logic is a difficult process. It first requires a clear understanding of the structure of a good performance measurement and reporting system. One commonly used structure is the following:

Table: Model for Rating Performance Reports

Organizational context and strategic outcomes are clear
Performance expectations are clear and concrete
Key results are reported against expectations
Performance information is credible and balanced
Use of performance information is demonstrated

Source: Adapted by CPM from the Office of the Auditor General of Canada, 2003



CCL reports its performance in its Annual Report, and in reports to its Board and its management committee. While a good start, these reports should be developed further. For example, CCL needs to be more specific when identifying its expected targets and when identifying measures of success or performance.

We recommend that CCL develop performance measures using as a guide its logic model as well as generally-accepted criteria for good performance measurement and management systems.

Management response:

CCL agrees with the importance of performance measurement. In fact, performance measurement across the spectrum of lifelong learning is one of the basic responsibilities of CCL's Monitoring and Reporting directorate. While most of our efforts to this point have focused on developing our organization and identifying our goals and work plans, we have recently turned our attention to performance measurement. CCL's Monitoring and Reporting directorate, working with the Chief Financial Officer, will identify an appropriate set of performance measures to monitor CCL's activities by October 31, 2006.

A key part of a results-based management system is having appropriate performance information. An equally key element is that the information is actually used by the organization, and particularly by senior management. Successful organizations use regular, periodic performance measures as an opportunity to discuss planned vs. actual performance and, as necessary, to adjust strategy and resources.

CCL has already taken steps to incorporate performance measures into their operations, for example, in the Human Resources Performance Management System and in their reports to the Board and management committee. CCL has plans to develop and implement a performance measurement system for its Communications and Outreach work group. Plans for other directorates are under way.

We recommend that once the design of the performance measures is completed, reports on key aspects of CCL's performance become a regular discussion item at management committee meetings, with the Board, and with other parts of the organization as appropriate.



Management response:

Performance measures provide their full benefits only if they are used to monitor and modify behaviour towards achievement of a goal. Once the appropriate set of measures is identified, they will be monitored and reported on a regular basis to the Executive group at CCL, and individually to the staff members and groups to which individual measures relate. Performance measurement and analysis will become a regular agenda item at CCL Board of Directors meetings. CCL will also incorporate performance measurement as an integral part of its annual Report.



1 Introduction

1.1 Background

In a rapidly changing global economy that places greater value on skills and knowledge than ever before, effective investments in education, training, and lifelong learning are essential to ensure the future prospects and social well-being of Canadians. This shift to a skills and knowledge-based economy has created an increasing demand for well-educated and skilled workers.

The Canadian public education system is considered to be a great equalizer in our society. It provides Canadians with the opportunity to achieve their full potential. If Canada is to keep up with the accelerating pace of technological change, it needs to invest in upgrading the skills of its citizens through participation in learning. An investment in skills development within a learning culture will increase innovation, improve the competitiveness of the Canadian economy, and promote the economic and social inclusion of all Canadians.

Canada is not alone in seeking ways to improve the learning available to its citizens. The member countries of the Organisation for Economic Co-operation and Development (OECD) have set a goal of making lifelong learning a reality for all. The OECD report, “Economics and Finance of Lifelong Learning”, indicates that “learning is an essential basis for progress in the ‘knowledge society’; it is critical for economic growth and social welfare. OECD member countries have committed themselves to making lifelong learning a reality for all.” Many countries have put in place national-level leadership for developing and sharing learning information.

One of the ways that Canada is investing in lifelong learning is through the Canadian Council on Learning (CCL). CCL was created to provide Canadians with the most current information about effective approaches to learning in order to enable individuals, educators, employers, labour, and policy-makers to make the best possible investments in learning.

1.2 Principal Functions and Purpose of CCL

CCL is an independent, not-for-profit organization funded primarily by the federal government. The scope of its activities encompasses the continuum of lifelong learning. This includes information about learning throughout all stages of life (childhood, youth and adulthood), in many settings (home, classroom, community and workplace), and in different forms (structured learning, self-directed learning, and learning by doing).



CCL is intended to be an objective and authoritative source of practical and relevant information for all Canadians. It does so by collaborating with institutions, organizations and networks.

1.3 CCL – Results-Based Logic Model

A logic model identifies the linkages between the activities, outputs, short-term outcomes, medium-term outcomes, and long-term and ultimate outcomes of a policy, program or initiative. It illustrates the set of related activities and shows a chain of results connecting activities to long-term and ultimate outcomes.

A logic model is a useful way to clarify CCL’s structure and logic, and the connections between its activities, outputs and outcomes. In addition, it can help enable CCL to build a performance measurement system that efficiently measures progress of each component of the results chain.

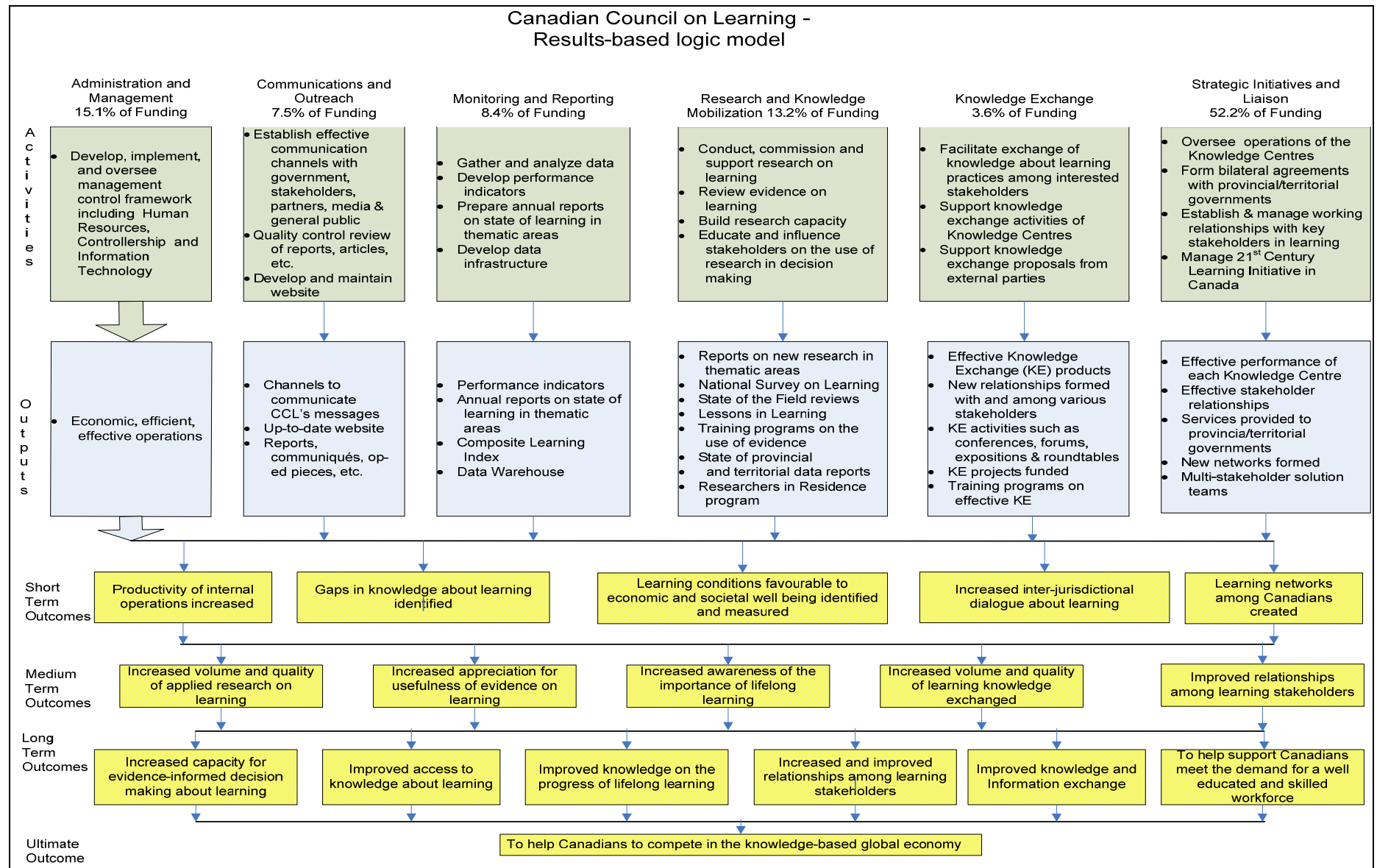
The approach used to develop CCL’s logic model is based on the longstanding practices of Program Evaluation, which reflect the current approach suggested by various professional organizations and the Government of Canada. Key definitions are:

- **Activities.** The actions undertaken to achieve desired outcomes.
- **Outputs.** The products or services that demonstrate the activities have been undertaken.
- **Outcomes.** The intended results of the activities and outputs for stakeholders. They are typically divided into short (one or two years), medium (two to five years), and long-term or ultimate outcomes (five to ten years or more).

CCL’s logic model is shown in Figure 1 below.



Figure 1: Canadian Council on Learning – Results-Based Logic Model



Source: CPM, 2006

Table 1 shows the resources consumed by each of the CCL directorates.

Table 1: Utilization of Financial Resources by Directorate, 2004-2009

Canadian Council on Learning Actual and Forecast Expenditures by Directorate				
Directorate	Actual		Forecast	
	March 31, 2004 to July 31, 2006		March 31, 2004 to March 31, 2009	
	\$000s	%	\$000s	%
Administration and Management	3,356	15.1	8,632	9.3
Communications and Outreach	1,659	7.5	2,232	2.4
Monitoring and Reporting	1,857	8.4	13,323	14.4
Research and Knowledge Mobilization	2,939	13.2	22,594	24.3
Knowledge Exchange	805	3.6	5,984	6.5
Strategic Initiatives and Liaison	11,606	52.2	39,935	43.1
Total	22,222	100	92,700	100

Source: CCL, CFO, 2006

Although each of CCL's directorates has a unique focus, the directorates work together to achieve CCL's two main outcomes, as specified in the Funding Agreement: informing Canadians on learning outcomes; and improving knowledge and information exchange. For example:

- The Administrative and Management directorate and the Communications directorate provide support to the other directorates;
- The directorates for Strategic Initiatives and Liaison, for Knowledge Exchange, and for Research and Knowledge Mobilization work together to deliver annual reports on various learning outcomes; and
- The Strategic Initiatives and Liaison directorate oversees the operations of a 'regional delivery' function of CCL – the knowledge centres (KC) described below. In turn, the KCs work with other directorates such as Knowledge Exchange and Communications to transfer knowledge obtained from the KCs' activities to the general public, media, and government bodies.

In these and other ways, each directorate contributes to the attainment of CCL's mandate.



2 Organizational Structure and Key Responsibilities

To achieve the mission and strategic goals of the Canadian Council on Learning (CCL), the organization has been structured around the key themes and activities shown in Figure 2 below.

Figure 2: CCL's Organizational Structure



Source: CCL, 2006

2.1 Administration and Management

Since its inception almost two and a half years ago, CCL has established two principal offices: one in Vancouver, British Columbia, and the other in the National Capital Region (NCR) in Ottawa, Ontario. The West Coast office focuses on research and knowledge mobilization, knowledge exchange, and the development and maintenance of strategic partnerships. The NCR office focuses on monitoring and reporting and houses CCL's communications, finance and administrative staff.



Three founding directors were appointed at the time of incorporation, and they identified and appointed nine other board members by autumn 2004. The Board is intended to reflect “the diversity of learning in Canada, with membership from the education, not-for-profit, and business communities and from all regions of Canada”^[1]. The Board meets regularly and reviews and approves key decisions, strategies, and activities of CCL. The Board of Directors hired the President and Chief Executive Officer, who took office in October 2004.

From autumn 2004 to June 2006, CCL assembled a management team and staff of approximately four dozen individuals. CCL is in the final stages of completing recruitment efforts. It is anticipated that CCL will have its full complement of staff in autumn 2006.

CCL has developed procedures in the areas of human resources and performance management, financial management, and IT infrastructure and management. It has also developed various other policies to help govern its activities.

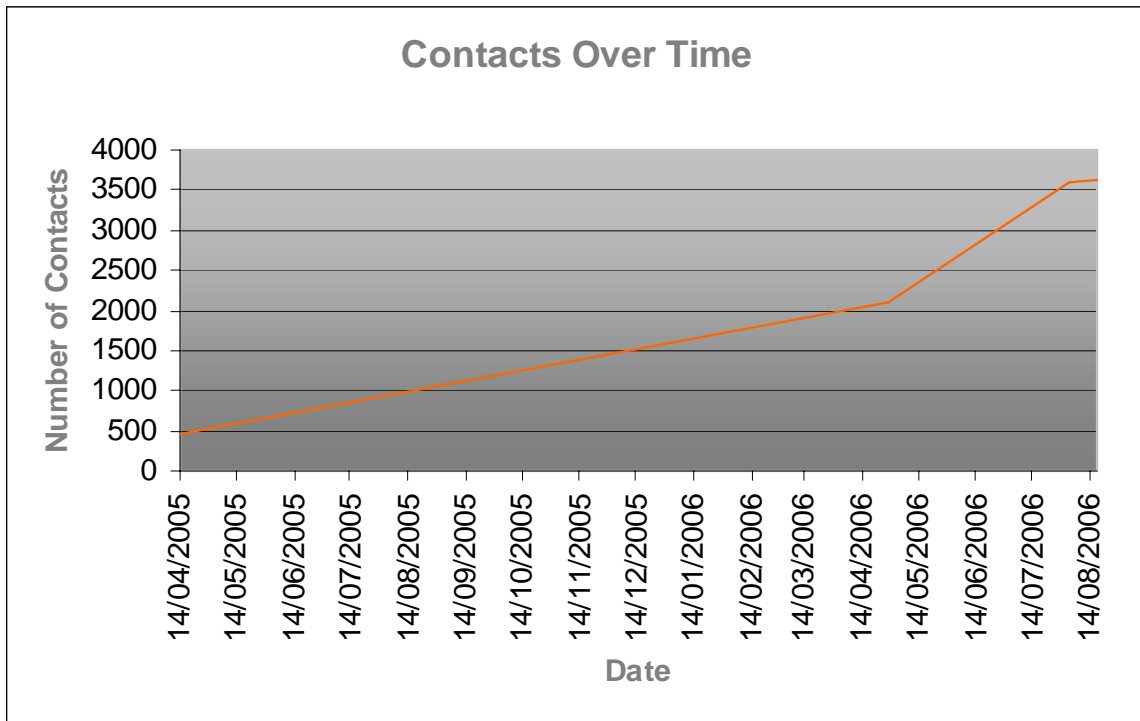
2.2 Communications and Outreach

CCL’s communications efforts in the last two years have focused on the following:

- promoting awareness of CCL through events (e.g., launch events for knowledge centres) and dissemination of publications;
- developing core communications products (e.g., corporate brochures, presentations, annual reports, etc.);
- creating and marketing an electronic bulletin, The Learning Link, launched in March 2005, which has a total of 36 issues to date and a subscriber base of approximately 3,000 individuals (See Figure 3 below that shows a steady increase in the number of Learning Links contacts);
- preparing speeches for the President and CEO on a variety of learning themes (to date 14 major speeches have been delivered by the President and an additional 8 by others at CCL);
- providing internal and external communications; and
- maintaining and updating the CCL website.



Figure 3: Learning Link Contacts



Source: CPM analysis of CCL data, 2006

CCL recently created a Communications and Outreach work group responsible for delivering a more effective strategy. The group is coordinated and chaired by CCL's President, and manages the following components:

- media relations (national and local);
- government relations (federal, provincial, territorial, and municipal);
- corporate and internal communications; and
- external relations (stakeholders).

A strategic plan for all four components is in the final stages of development.

2.3 Monitoring and Reporting

The need for data and analysis to inform Canadians of Canada's progress in learning is being addressed primarily through the Monitoring and Reporting directorate. This directorate's projects include the following:

- annual reports on key learning themes and the state of learning; and
- a data infrastructure/warehouse used to report on the state of learning.

2.3.1 Reports on Key Learning Themes and the State of Learning

Reports on key learning themes and the state of learning are intended to help learning professionals, policy-workers, and individual Canadians understand the challenges faced and progress made in various areas of lifelong learning. Two key reports are the CLI and the post-secondary education report.



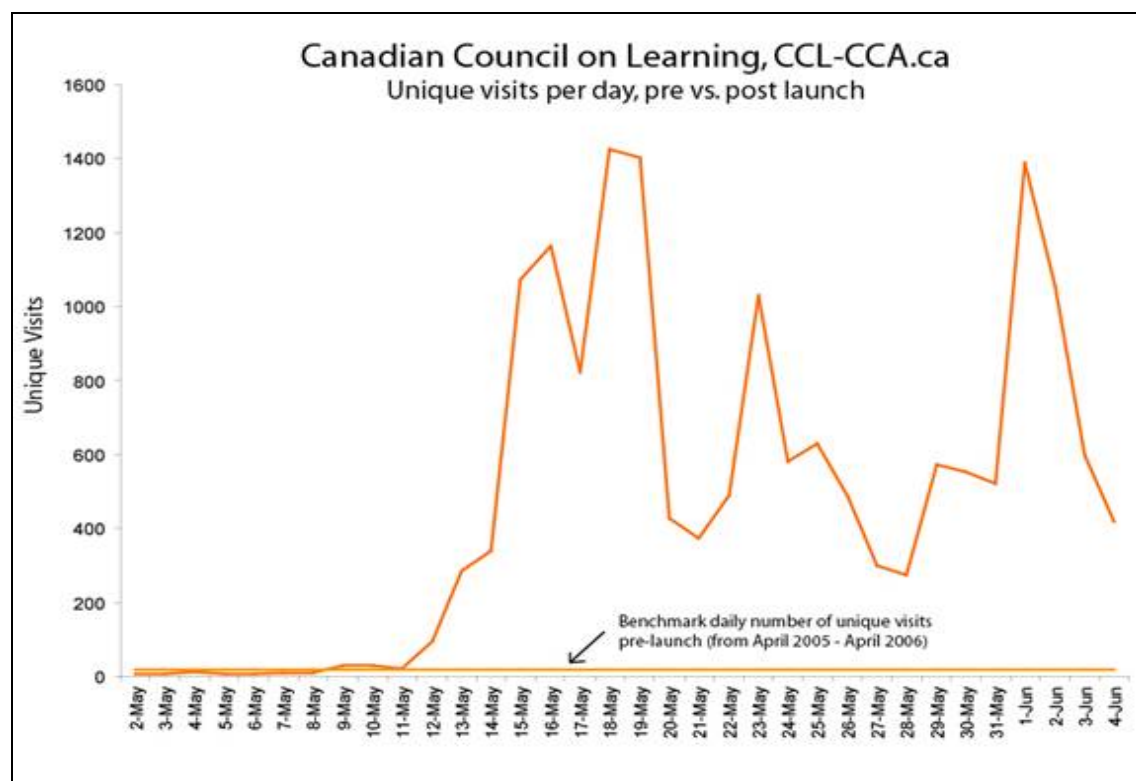
Starting in autumn 2006, CCL will issue a thematic report on Literacy and Learning. In 2007, CCL will release annual thematic reports throughout the year in all eleven domains. CCL will issue annual reports for each of its five strategic priorities – Aboriginal learning, adult learning, early childhood learning, health and learning, and work and learning – and its five cross-cutting themes of gender, e-learning, literacy, culture, and learning in French-language minority settings. In addition, it will address structured learning (kindergarten to grade 12).

Composite Learning Index

The Composite Learning Index (CLI) is a new monitoring and reporting system that assesses Canada’s performance in the area of learning. The CLI will report annually on the state of learning over time in different regions of Canada. It is a composite of approximately 15 indicators of learning across all ages, from early childhood to advanced adulthood.

The reaction to the launch of the CLI on May 15, 2006, has been positive. For example, as seen in Figure 4 below, the number of hits to the CCL website immediately increased after the launch of the CLI.

Figure 4: Unique Visits to Website per day



Source: CCL internal data, 2006
 CCL is in the process of conducting a review of the nature and extent of this reaction.



Report on Post-Secondary Education

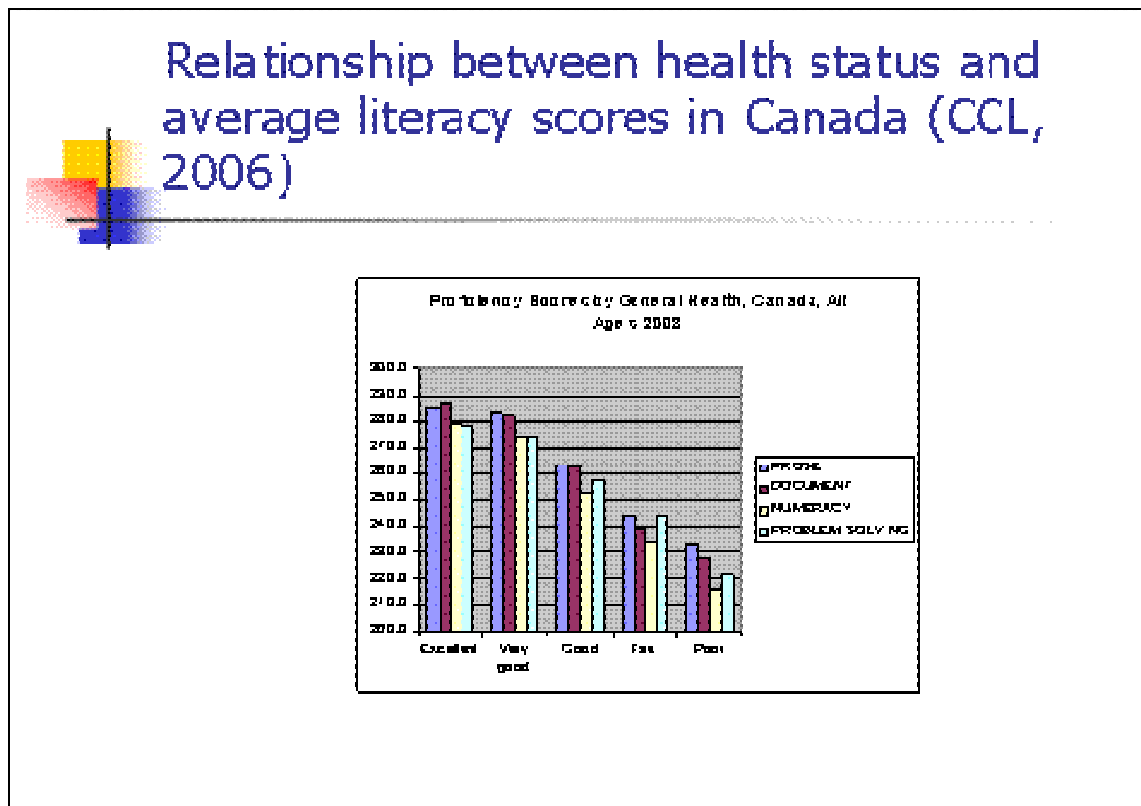
CCL is in the final stages of preparing a much anticipated report on the state of post-secondary education in Canada. This report will analyze the extent to which post-secondary education is meeting national objectives. In the first report, these national objectives will be identified by reference to objectives commonly articulated by the provinces and territories. This report will be published annually, beginning in autumn 2006.

Data Infrastructure/Warehouse

CCL is in the process of developing a data infrastructure to maximize the potential resources of the Monitoring and Reporting directorate. It includes the development of various frameworks for selecting the relevant data indicators, as well as for creating the proper environment for obtaining, storing, processing, and disseminating the information to the public.

For example, CCL was able to produce the data for the chart shown below in Figure 5 by combining existing Statistics Canada data. This information is being used by the Health and Learning Knowledge Centre in one of its working groups, to increase public awareness and understanding of the importance of the relationship between health and literacy.

Figure 5: Relationship Between Health Status and Average Literacy Scores in Canada



Source: CCL, 2006



In addition, CCL worked with Statistics Canada in 2004/05 and 2005/06 to enhance the delivery and timeliness of some key indicator sets that will be reported in 2006/07.

2.4 Research and Knowledge Mobilization

The Research and Knowledge Mobilization directorate has three main goals:

1. To foster high-quality research on learning;
2. To build capacity for research on learning; and
3. To encourage the use of research on learning to inform decisions about learning.

All research supported by CCL includes an explicit strategy for knowledge mobilization and requires partnerships among researchers, non-governmental organizations (NGOs), and various levels of government.

This directorate is in the process of conducting “state-of-the-field” reviews designed to determine the available research in key areas. Commissioned research is under way in various areas, such as high school dropout rates, student employment trends, children’s behaviour problems and school functioning, disabilities and access to education, and female students and the School Achievement Indicators Program (SAIP) with respect to science. In addition, CCL has funded 10 research projects on the theme of structured learning and plans on funding five in the future.

In 2005, CCL began to produce an on-line publication titled “Lessons in Learning”. It is a regular electronic publication designed to provide Canadians with independent, evidence-based information about “what works” in learning. Work is under way to produce “Lessons in Learning” issues on a wide variety of topics. So far CCL has produced 16 issues.¹

In addition, in autumn 2006, CCL will publish the first of an annual “Learning in Canada: A Pan-Canadian Survey of Attitudes,” a recurring report that will address questions about CCL’s priority thematic areas and focus on particular dimensions of learning. The survey is intended to be a relative indicator of Canadian attitudes about learning. The results are intended to be of interest to policy-makers, researchers, and practitioners, and will also serve to promote Canadians’ awareness of the value of learning throughout their lifespan.

To build capacity, this directorate initiated a Researcher-in-Residence program. Currently, CCL and the Vancouver School Board (VSB) have partnered to sponsor a “researcher-in-residence” who is working with the school district’s Community Schools and Inner City Schools’ project staff. This initiative, cost-shared with the VSB, started in December 2005 and will continue for three years.

¹ <http://www.ccl-cca.ca/ccl>, Canadian Council on Learning, Sept. 2006



The initiative is intended to increase the appreciation for and the capacity to conduct evidenced-based research by placing a researcher within teams of teachers, the community, and social workers.

Finally, this directorate is also responsible for encouraging the use of research on learning. This is accomplished, for example, by holding training programs on the use of evidence.

2.5 Knowledge Exchange

One of the prime elements of CCL's mandate is to improve knowledge and information exchange.

The Knowledge Exchange directorate builds on existing research and monitoring in the field of learning and supports the development of knowledge exchange practices across the country by:

- Partnering with existing organizations with expertise in lifelong learning to build on their work;
- Supporting knowledge exchange activities, such as conferences, forums, expositions, and roundtables;
- Fostering the exchange of success stories and exemplary practices across Canada; and
- Engaging end users in the design and delivery of research to improve knowledge uptake.

The most important way that CCL facilitates knowledge exchange is through conducting and participating in learning events, such as conferences and seminars. These events are used as a way to exchange knowledge and build relationships among researchers, policy-makers, practitioners, and learners, with the intent of improving decision-making by all stakeholders. For example, there have been four knowledge centre development conferences (for adult, health, work, and early childhood).

2.6 Strategic Initiatives and Liaison

About half of CCL's resources are consumed by activities performed by the Strategic Initiatives and Liaison directorate. (See Table 1, Section 1.3.)

The Strategic Initiatives and Liaison directorate focuses on three key areas:

- Strategic partnerships with other organizations to work on projects of mutual interest. Organizations may be regional, national or international;
- Operations of knowledge centres that are based on five thematic areas: adult learning, early childhood learning, Aboriginal learning, work and learning, and health and learning; and
- Inter-sectoral work in cross-cutting areas in the following priority areas: gender, e-learning, literacy, culture, and learning in French-language minority settings.



2.6.1 Strategic Partnerships

CCL is developing strategic partnerships with other organizations, most notably bilateral agreements in the area of structured learning (kindergarten to grade 12 and post-secondary) with provincial and territorial governments. The purpose of these agreements is to establish networks, identify research priorities, and support research and knowledge exchange. Agreements are in place with four provinces, and agreements are anticipated with an additional six provinces and territories by autumn 2006.

Another example of partnerships is the 21st Century Learning Initiative (Canada), launched in September, 2005. The Initiative, led by John Abbott, is a network of academics, researchers, policy-makers, and practitioners from numerous countries. Their goal is to facilitate the development of new approaches to learning that draw upon the most current insights into the human brain, the functioning of human societies, and learning as a community-wide activity. CCL is advancing the work of the Initiative by developing a pan-Canadian program, based on the research provided by the Initiative, to engage Canadians in dialogue about the relationship between learning and the community.

Other relationships have been established with key organizations representing various aspects of the lifelong learning continuum.

2.6.2 Knowledge Centres

Knowledge Centres (KC) consume a significant portion of CCL's resources (under \$30M). The following were established to address the five key learning themes:

- Adult learning – Atlantic Canada;
- Early childhood learning – Quebec;
- Work and learning – Ontario;
- Aboriginal learning – the Prairies, Northwest Territories and Nunavut; and
- Health and learning – British Columbia and Yukon.

Located regionally, they operate as national networks and sources of expertise. Each has a regional membership and executive, and an advisory board drawn from all parts of Canada. The purpose of each is to establish a national network in their field; to support CCL's achievement of pan-Canadian research, monitoring and reporting activities; to share exemplary practices and models; and to undertake knowledge exchange activities.

Except for the Aboriginal Learning Knowledge Centre, which is in the final stages of set up, each KC has been in existence for almost a year and has established a governance structure, identified members, and started activities approved by its executive. As outlined in detail later, there are over three hundred and fifty members of these KCs.

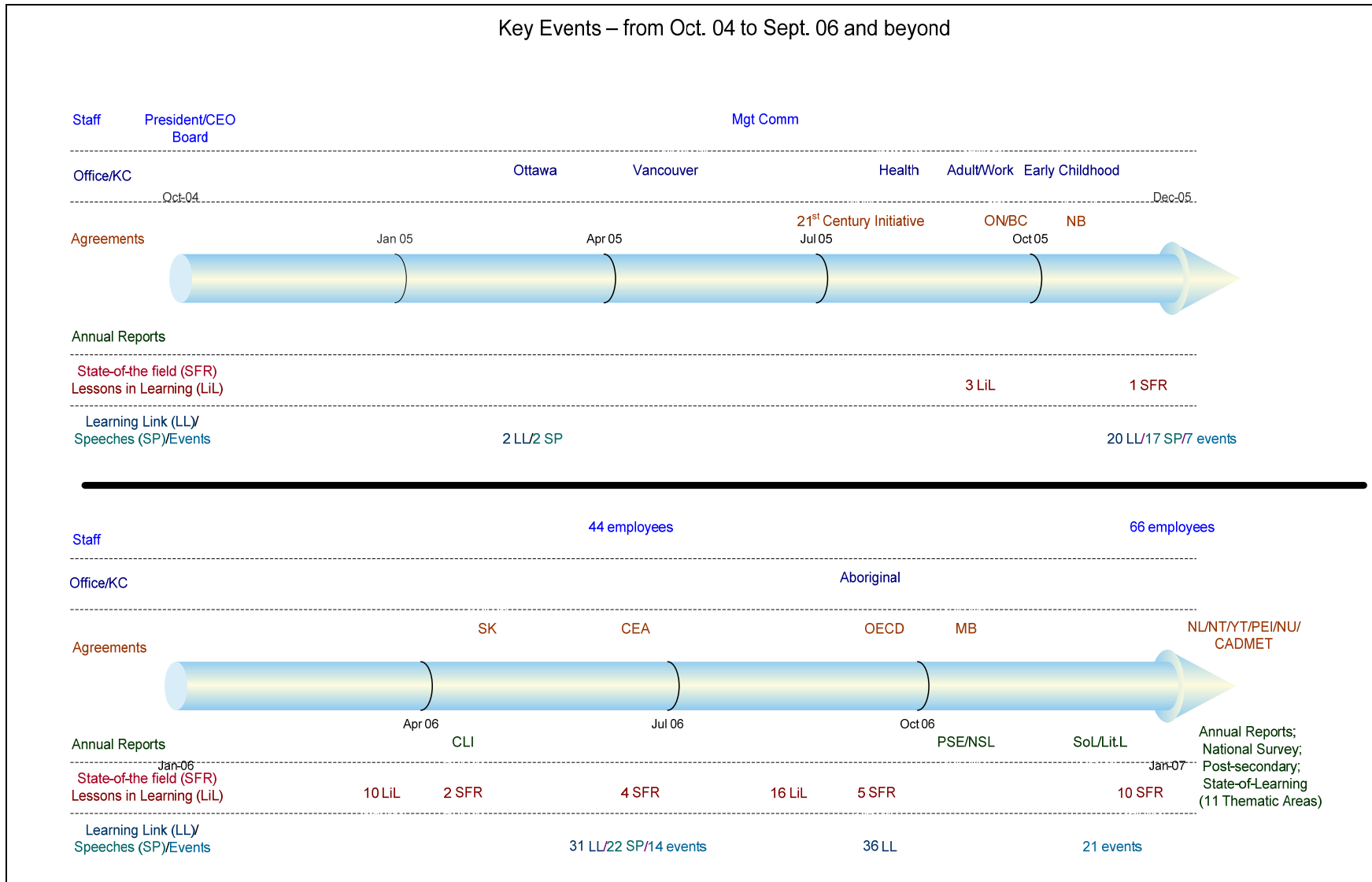


2.7 Key Events – Timeline

Timing of the key events – hiring of staff, opening of offices and KCs, publishing of reports on the state of learning in Canada, and the knowledge and information exchange outputs among learning partners – is illustrated in Figure 6 below.



Figure 6: Key Events – From October 2004 to September 2006 and Beyond



Source: CPM, 2006



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3 Formative Evaluation Questions, Methodology, and Scope

3.1 Evaluation Questions

As required under the terms of its Funding Agreement, by September 30, 2006, CCL will complete a Formative Evaluation of the “implementation, design, and delivery (of its activities) ... (and of its) progress toward achieving (its mandate)². CCL’s Board of Directors directed that the following questions be addressed in the formative evaluation:

1. To what extent have CCL’s corporate goals been refined into specific objectives, operations, and outcomes?
2. To what extent are CCL’s intended audiences, resources, activities, and outcomes consistent with its goals and with one another?

During the planning phase, the following question was added:

3. To what degree is CCL ‘on track’ in achieving its outcomes for the five-year time period ending March 31, 2009?
 - From an **infrastructure** perspective: Does CCL have the right human resources in place and has it set up other appropriate processes and systems?
 - From a **results** perspective: Given that it is in its early stages,
 - i) has CCL progressed as expected; and
 - ii) is it likely to achieve its expected outcomes?

3.2 Evaluation Method

The evaluation will provide answers to these three questions primarily through the collection and analysis of interviews with selected members of the Board of Directors; key CCL staff (12 interviewees)³; key provincial, territorial, and federal stakeholders (17 interviewees); and a sample of non-government stakeholders (16 interviewees). These interviews were conducted in person or by telephone. The sample was selected to represent those involved in the design, delivery, and ‘receipt’ of CCL activities and in a position to provide a credible perspective on each of the evaluation questions. In addition, the four existing knowledge centre (KC) coordinators were interviewed. As well, a sample of each KC’s members

² Funding Agreement, March 31, 2004. 8.3.

³ In addition, we interviewed two KC coordinators who are CCL employees.



were either interviewed or surveyed by e-mail. Again, these interviewees were selected because they were knowledgeable, credible, and representative of the design and delivery of the KC activities. In total, over ninety interviews were conducted, about one-third in person, one-third by telephone, and one-third via e-mail.

Interviewees were selected using the 'snowballing' technique. A list of nominees was prepared from knowledgeable, credible sources. This list was cross-referenced with other knowledgeable credible sources. The resulting list was subjected to a similar type of review to ensure that we had met the criteria appropriate for a formative evaluation: a list of interviewees and stakeholders sufficiently credible and knowledgeable to provide sufficient and appropriate information on each of the evaluation questions.

Before and after the interviews, extensive documentation was reviewed that provided insight on each evaluation question. Key documents included:

- CCL's Funding Agreement;
- CCL's internal plans, and reports against those plans; and
- A variety of CCL products, such as the Annual Report, the CLI state-of-the-field reviews, and synthesis research.

We reviewed extensive internal documentation on the operation of CCL, including:

- Memorandum of Understanding;
- Agreements with individuals and organizations providing services to CCL; and,
- A variety of documentation on CCL's human resource, financial, and governance systems and procedures.

One case study was conducted on a synthesis of research activities. In addition, information was obtained on similar 'foundations' or 'arm's-length organizations' created by the federal government. These were:

- The Canadian Institute for Health Information (CIHI), and the Canadian Millennium Scholarship Foundation, both organizations with several similar purposes and similarities to CCL;
- Canada Health Infoway, a much larger funded organization that has similar jurisdictional issues and a need to build an infrastructure from the ground up; and
- The Canadian Foundation for Climate and Atmospheric Sciences (CFCAS), an organization with a similar level of funding, some jurisdictional issues, and a need to build infrastructure from the ground up with an emphasis on engaging Canadian citizens.

The federal government's Management Accountability Framework provided some guidance on the criteria for appropriate management of several key CCL internal functions, such as the management of people, the stewardship function,



and governance and accountability for results. In addition, we used other generally accepted criteria, for example, on conducting research synthesis; raising, vetting and managing research and professional service contracts; and reporting results.

Analyses of this data were primarily qualitative. All methodology processes were cleared prior to implementation. All interviews and questionnaires were pilot tested. All observations and conclusions were cleared as required.

Finally, the integrity of the evaluation methodology was reviewed internally by CPM following professional, Treasury Board Secretariat (TBS) and Office of the Auditor General (OAG) standards. The methodology, resulting observations, conclusions, and recommendations were reviewed by an Evaluation Advisory Panel. The intent of all these procedures was to provide cost-justified conclusions and recommendations based on 'state-of-the-art' techniques.

Appendix 1 contains a list of the Evaluation Advisory Panel members and people interviewed or surveyed. Advisory Panel members were asked to review methodology and provide advice on drafts of the report. The authorship of this report rests with the Centre for Public Management. Appendix 2 contains a list of the key documentation reviewed.

3.3 Evaluation Scope

The evaluation was conducted during the summer of 2006. All products and plans as of that date were included in the scope of the evaluation. We did not review in detail all activities and products, but focused on key internal processes, such as people, stewardship, governance; key internal analytical processes, such as raising, vetting, and management research processes; and a review of activities involved in conducting summaries of research findings.

Because only four knowledge centres had been operating for a period of time, we did our analyses on these, confident that operations of the Aboriginal Learning Knowledge Centre, which was still being set up, would be similar to those of the other centres.

In addition, in May and through the summer of 2006, there was a significant change in the Communications and Outreach function, culminating in a strategy paper to be prepared by September 1. Accordingly, we have not examined these activities.



4 Results

Evaluation questions:

1. To what extent have CCL's corporate goals been refined into specific objectives, operations, and outcomes?
2. To what extent are CCL's intended audiences, resources, activities, and outcomes consistent with its goals and with one another?
3. To what degree is CCL 'on track' in achieving its outcomes for the five-year time period ending March, 2009?
 - From an **infrastructure** perspective: Does CCL have the right human resources in place, and has it set up other appropriate processes and systems?
 - From a **results** perspective: Given that it is in its early stages, has CCL progressed as expected and is it likely to achieve its expected outcomes?

4.1 Evaluation question 1: To what extent have CCL's corporate goals been refined into specific objectives, operations, and outcomes?

Conclusion: These objectives and intended outcomes are consistent with the original goals and outcomes found in the Funding Agreement. CCL's outcomes are clear and have been articulated in internal documentation as well as in communication with external stakeholders.

CCL's operations that support the attainment of these objectives or outcomes have been developed and largely put in place over the past 12 months. It is expected that CCL's operations will be fully resourced by autumn 2006. At that time, it is also expected that CCL will have all its operational policies and procedures in place. At the time of our review, we found that, with two exceptions, these operations are completely designed and implemented. The two key exceptions are: Communications and Outreach; and Performance Measurement, Reporting, and Use.

Observations:

Have corporate goals been refined into specific objectives and outcomes?

Subsequent to the budget announcement of 2002, and the announcement at the Innovation Summit in 2002, consultations were held with a wide range of government officials, NGOs, and individuals involved in the various components of lifelong learning. During this time, the elements of CCL's structure and

operations became clearer. Two key documents were produced under contract to the then minister of HRSDC (Levin & Seward, 2003; Public Policy Forum, 2003.) The principles proposed in these documents were formalized into the Funding Agreement of March 31, 2004, which states that the aims of CCL are:

- To inform Canadians regularly on Canada’s progress on learning outcomes; and
- To promote knowledge and information exchange.

The Funding Agreement goes on to say that CCL should:

- “address information and knowledge gaps and provide evidence-based information to improve investments along the full span of lifelong learning; and
- “improve learning outcomes of Canadians to compete in the knowledge-based global economy and meet the demand for a well-educated and skilled workforce” (preamble, Funding Agreement, 2004).

As can be seen in CCL’s logic model, many of CCL’s short, medium and long term outcomes are reflected in the Funding Agreement mandate. Most respondents observed that CCL operates in a unique niche in lifelong learning: independent of government adding value to existing activities and contributing to learning outcomes.

Have corporate goals been refined into specific operations?

During 2004, the Board was appointed and the first of CCL’s employees – the President and CEO; and the Director, Strategic Initiatives and Liaison were hired. By June 2005, the management committee was in place. It is expected that by December 2006, CCL will have a full complement of staff.

As can be seen in the timeline in Section 2.7, the offices in Ottawa and Vancouver, and the KCs were opened in 2004 and 2005, giving CCL both a regional presence and a pan-Canadian perspective.

The organizational structure, activity areas, and a strategy for achieving CCL’s objectives were developed and reviewed by CCL’s Board. Subsequently, and primarily by the end of 2005, the structure and operations described in Section 2 were put in place.

Based on interviews with CCL employees, and a review of selected CCL reports prepared for internal use and public consumption, it is obvious that there is a



reasonably clearly articulated and understood set of specific objectives for CCL. Based on the same evidence, the various operations of CCL are also clearly understood. This applies to the offices in Ottawa and Vancouver, as well as in each of the existing knowledge centres.

Based on interviews with key stakeholders in government, in each of the four knowledge centres, and in other key lifelong learning areas, it is clear that the corporate goals have been translated or refined into sufficiently clear and understood outcomes and operations.

Of course, it is acknowledged by everyone interviewed that CCL is really ‘in its first year’ of having these operations and outcomes defined and in place, and that continued refinement is necessary. However, this is seen as a refinement rather than a change in direction, and it is expected to be largely completed by 2007.

4.2 Evaluation question 2: To what extent are CCL’s intended audiences, resources, activities and outcomes consistent with its goals and with one another?

Conclusion: By similar analyses to those conducted for question 1, and based on the results of the key stakeholders involved in CCL design and delivery (CCL staff and KC coordinators, management, and members) and targets of CCL activities (other NGOs, provinces, territories, and individuals) the identified audiences, resources, and activities are generally consistent with CCL’s goals. Further, they are generally consistent with each other, both in level and type of resources consumed and in strategy.

Observations:

The key group of interviewees in a position to answer this question were those involved in the initial design of the events leading up to the funding of CCL in March 2004, as well as those involved in the cross-Canada discussions that immediately followed.

All of these interviewees indicated that, in their opinion, the outcomes and operations or activities are aligned with their understanding of the original anticipated goals of CCL and with each of its operations and activities. They also indicate that, within the original funding envelope, there is an appropriate balance of resource expenditure. They are all in accord that the strategy, activities, and operations are aligned with each other and with the original goals or strategic outcomes for CCL.

This alignment is also evident from the elements of the results-based logic model shown in Section 1.3, and from subsequent analyses of resource allocations to these activities. It is also reflected in interviews with CCL staff, with other key

stakeholders interviewed at different levels of government, and with other lifelong learning stakeholders.

4.3 Evaluation question 3: To what degree is CCL 'on track' in achieving its outcomes for the five-year time period ending March 2009?

- From an **infrastructure** perspective: Does CCL have the right human resources in place and has it set up other appropriate processes and systems?
- From a **results** perspective: Given that it is in its early stages, has CCL progressed as expected and is it likely to achieve its expected outcomes?

Conclusion: Infrastructure. Based on an analysis of CCL's processes and systems, CCL is in the final stages of recruiting staff and implementing appropriate management and administrative systems and processes. These tasks are expected to be largely finished by the end of 2006. It is generally acknowledged that, in terms of the administrative and management systems and processes, the results of this 'first round' will require modifications and refinements over the next year.

Conclusion: Expected progress. Based on the expectations of those involved in the original design of CCL and the initial consultations, the degree of progress CCL has achieved is at least as much as was expected. Given the time necessary to design and develop a new entity of this sort within the context of the Canadian federation, to have an organization in place with the attendant personnel and administrative infrastructure, and to have made as much progress in designing and developing the products and activities as CCL has, is seen by some as "much more than expected," and by almost all as "what would be expected."

Conclusion: Is CCL likely to achieve its expected outcomes? Based on interviews and a review of documentation, as noted, we conclude that CCL largely has the infrastructure in place to achieve its intended outcomes. Further, the strategy and attendant activities and operations, as designed, appear to be consistent with CCL's five-year outcomes being achieved. However, there is a real recognition that there are only two and a half years left in CCL's current mandate. The infrastructure is not yet completely in place, and only initial products are out the door. These first products, such as the CLI, the meetings and plans in the knowledge centres, and the initial knowledge exchange and mobilization activities, have been well received. However, there is a real appetite (and an almost 'wait and see' attitude) to know the degree to which these and other activities – in particular, the Post-Secondary Education report – will fulfil the ambitious expectations of CCL.



4.3.1 Observations: Infrastructure

In examining infrastructure, we concentrated on the following areas, which are critical for an organization's success:

- Appropriate management of the human resources function;
- Appropriate management of the stewardship and financial accountability function;
- Appropriate operational accountability for results;
- Appropriate management of key operational areas such as generating and disseminating knowledge; and
- Appropriate measurement and reporting.

4.3.1.1 Human Resources

Background

A critical component of a successful organization is its management of people. Proper human resources management can make the difference between a successful and an unsuccessful strategy. In some ways, CCL has had the 'advantage' of building an organization from 'the ground up' since its inception two and a half years ago. It is, however, a real challenge to identify a Board of Directors (all of whom are volunteers), hire a CEO and President, get a management team on board, and hire enough staff to design and deliver successful strategies and products in only two years.

In order to assess the degree to which CCL has built an appropriate human resources management system, we asked the following questions:

1. **People:** Does CCL have the people, work environment, and focus on building capacity and leadership needed to ensure its success?
2. **Learning, Innovation, and Change Management:** Does CCL manage itself through continuous innovation and transformation, promoting organizational learning, valuing corporate knowledge, and learning from its performance?
3. **Values:** Through their actions, do CCL's leaders continually reinforce the importance of public service values and ethics in the delivery of results to Canadians?

To answer these questions, we reviewed all relevant documents, including CCL's Performance Management Program, 2006/07; Policies and Procedures, 2005; and the Human Resources and Administration Directorate Goals/Objectives, 2006/07. We also conducted interviews with the head of HR, members of the executive and board, and staff members in Ottawa, Vancouver, and the KCs.

Overall, CCL has made significant progress in setting up and maintaining solid human resources, learning, and public service values functions in a short time with limited resources. In October, 2004, an HR professional was hired two days

per week to recruit. The role was expanded in March 2005, to include all HR and administration, office management, facilities and IT functions at four days per week. (It should be noted that administrative functions take a substantial portion of the time of the Associate Director of Human Resources and Administration.) An administrative assistant was also hired in March 2005. CCL now has over forty full-time staff and is anticipating a full complement of staff by the end of this calendar year.

CCL has designed and implemented a set of systems and procedures for the management and administration of human resources as indicated by the following procedures and strategies:

- The “Total Reward Strategy,” which is the basis of the strategy to attract and retain employees;
- The values of the organization have been articulated, communicated, and are rewarded through the compensation plan;
- An employee performance review process is designed with compensation that is linked to performance;
- A job evaluation process was undertaken, and employees’ current and future compensation has been mapped;
- Specific objectives for employees are linked to organizational objectives;
- An HR information system is in place;
- An Employee Questionnaire was undertaken, and workplace issues have been identified and addressed;
- Research and analysis is conducted (e.g., salary surveys, best practices);
- A recruitment plan is in place; and
- Learning objectives are identified by employees and the manager during the planning process, and a training plan is drafted.

A review of the systems and practices in place with respect to values, ethics, people, learning, and change management indicated that CCL has the supporting infrastructure, policies, and information to make decisions on human resources management. However, continued improvement is needed in the following areas to ensure that operational goals are met to 2009.

Succession planning for key senior management positions

If the key positions were to become vacant, it would pose a risk to the achievement of the organization’s mandate. There is no plan in place to deal with this risk except that other senior managers and the CEO would be called on to take over the duties of the vacant position.

While this may be effective for a short time, a more comprehensive strategy is recommended. A succession plan should be prepared to address this issue. Elements of the strategy that could be considered include preparing a short list of potential candidates, or engaging a recruiting firm. As a minimum, an analysis



should be undertaken to determine which duties could be covered by which other directors in the short term.

Human Resources Planning

While the various elements of human resources planning are all conducted to some extent within the current human resources framework, CCL may want to develop a formal human resources plan. The human resources plan should be prepared for the period remaining in the organization's mandate, and should be updated once per year. The plan should include a workforce analysis (current and future needs and a gap analysis) and should identify internal and external human resource issues and strategies to address these issues. In addition, the HR plan should flow directly from CCL's Business Plan.

Strategy to address human resources issues through to the end of CCL's current mandate

The extension of funding for CCL's mandate is undetermined. As a result, a prudent organization needs to plan for two possible outcomes: closure at the end of year five, or an extension of the mandate. CCL should review the HR issues posed by each of these scenarios. For example, if the mandate is not renewed, employees may seek permanent employment elsewhere prior to the closing date, and it may be difficult to fill positions that are vacant or become vacant in the last year or so.

4.3.1.2 Stewardship and Financial Accountability

Background

A key component of any successful organization is its stewardship function and related financial accountabilities. While important in any organization, issues such as transparency and authorities are particularly important in a relatively decentralized, arm's-length organization funded primarily by the federal government.

To assess the degree to which CCL has designed and implemented appropriate controls, we asked the following:

1. **Stewardship:** is CCL's control regime integrated and effective, and are its underlying principles clear to all staff, including those at its knowledge centres and those in a contractual relationship with CCL?
2. **Financial Accountability:** Is accountability for results clearly assigned and consistent, with resources and delegations that are appropriate to capabilities?

We examined the following areas:

1. Financial management and control:
 - a. financial assets, real property;
 - b. third-party funding accountabilities (e.g., research and other project funding; Knowledge Centres); and
 - c. reporting;
2. Compliance to the financial requirements of the Funding Agreement; and
3. Information and IT management.

The findings are based on an interview with the Chief Financial Officer and other key officials in Ottawa, the regions, and KCs, as well as a review of relevant documents such as the Funding Agreement, annual reports (including audited financial statements), key policies (such as Delegation of Signing Authority), the standard Project Funding Agreements, the standard Framework Agreement Template for the Knowledge Centres, the annual Business Plan, and CCL's document on "Administrative Costs Proposal" (undated).

Observations

Financial Management and Control

Financial control. CCL has implemented a standard accounting software program that includes such modules as general ledger and accounts receivable/payable. They are in the process of finalizing other modules and related policies necessary for full implementation of this program. Based on a review of this system and on a review of key CCL policies, such as the Delegation of Signing Authorities and the Annual Report, including the audited financial statement and the management letter, we conclude that CCL's control framework is or will shortly be reasonably integrated and effective.

Control over third-party funding. CCL has set up a peer review-based system to review and evaluate proposals it receives for eligible projects. The Research and Knowledge Mobilization Unit is responsible for determining the research priorities and conducting an RFP process. It is also responsible for conducting a subsequent peer review of submissions. Once funding decisions have been made, they enter into negotiations with the Lead Contractor. The Ottawa office then draws up a formal contract and the Research and Knowledge Mobilization Unit ensures that the contract is executed prior to any funds being disbursed. The Research and Knowledge Mobilization Unit is also responsible for the ongoing monitoring of grants, including milestones and deliverables. A financial report is sent to the Ottawa office at the end of each project. A portion of the grant is held back until all deliverables have been received.

KCs have entered into agreements with CCL, and operate under the Framework Agreement Template. Based on an annual Business Plan, approved funds are released when a properly authorized invoice is received by the KC. (See below for further details on the accountability relationship between KCs and CCL.)



Financial Information Reporting. CCL appears to have made significant strides this past fiscal year in increasing the financial information it provides to managers. Management is currently being provided with quarterly statements (with an objective of monthly reporting in the near future), and Directors are being asked for commentary and variance analysis on a quarterly basis. Directors of the different programs and activities were involved, in a very comprehensive process, in the development of their own budgets for this fiscal year. In addition, the CFO and the Controller are now in the process of developing a training session for managers and directors that will help them augment their financial management expertise.

Compliance to key financial requirements of the Funding Agreement

Article 5.2 outlines the eligible uses of the fund, including the requirement that CCL shall not use more than ten percent of the fund to cover its administrative costs. The Funding Agreement is not specific as to whether this is an annual target or a five-year target, or about what should be considered an administrative cost. CCL has taken the position that this is a five-year target, and it has defined what it considers to be administrative costs. CCL has submitted a document outlining the proposed definition of and approach to administrative costs to their external auditors, and we understand the auditors have generally endorsed the approach. Based on our brief review of the document, CCL's proposal does appear reasonable.

Article 5.11 states that CCL shall expend one-third of the Grant prior to the mid-point of the funding period (September 2006). Based on a review of the documentation provided, and on confirmation obtained through an interview with the CFO, CCL will not meet this requirement. CCL expects to be under-spent by approximately 3 to 4%. Part of the reason for this is that the start-up period lasted for the year and a half of operation. This would likely be considered normal in this type of situation.

The Funding Agreement outlines a number of requirements for the management and investment of the fund. Overall, it is our opinion that CCL has generally abided by the terms and conditions of the Agreement.

Information and IT management

CCL does not yet have formal IT security policies. During the interview, the CFO stated that part of the mandate of the new IT Network Administrator hired in March 2006, is to develop the necessary IT policies required by CCL. This includes backup procedures, disaster recovery procedures, and procedures for protecting private information.

A Strategic Plan for Information Technology was developed in October, 2005, by an external IT consulting firm. The plan provides a roadmap for the strategic use



of information technology to support all of CCL's operations, including the systems that are recommended to support this work. The implementation of any IT strategy is a complex, multi-faceted project. It will be essential to apply solid project management practices to minimize risks, ensure quality, and adhere to the budget and timeline. Prior to implementing each initiative, CCL must ensure that the requirements and design are well developed. An implementation plan has been defined and ongoing support is planned.

As this project continues to go forward, CCL should ensure that strong project management skills and practices are applied to all IT projects to minimize risks, ensure quality, and adhere to the budget and timeline.

Conclusion

Overall, CCL has built the financial and accountability infrastructure required to enable the organization to achieve its mandate as outlined in the Funding Agreement. It should be noted that this has been accomplished in a very short time. For the first 12 to 18 months of its existence, CCL was in start-up mode. It has only been during the last year or so that it has started hiring most of its staffing complement. As a result, a number of policies and controls have since followed. While some elements remain to be put in place, it appears that CCL is currently in the process of implementing them or has committed to do so in the near future.

In any new or growing organization, it can be very difficult for staff to keep up with ongoing changes. Communication becomes a critical element in securing the success of initiatives. CCL should continue to take every opportunity that presents itself to ensure that its policies and procedures are well communicated and understood by all staff.

4.3.1.3 Operational Accountability for Results – the Relationship between KCs and CCL

Another key element of effective management is governance over operations and accountability for results. Accountability is "a relationship based on obligations to demonstrate, review, and take responsibility for performance, both the results achieved in light of agreed expectations and the means used." (Office of the Auditor General, 2002, Chapter 9)

In examining accountability, we focused on the accountability relationships of the knowledge centres, their members, the regional executive, and their national advisory committees.

The Knowledge Centres are a cornerstone of CCL operations and strategy. They will consume just under \$30m of all CCL resources. Other areas of CCL, such as Monitoring and Reporting and Knowledge Mobilization, also contribute to



the KCs' activities. Finally, considerable resources are expended by the (currently) over three hundred and fifty member organizations of the KCs.

KCs represent a key CCL strategy – although they are regionally located, with a regional executive, they are intended to operate as a national network and source of expertise for each of the five themes.

Table 2 below shows the number of members by KC and, for each KC, the location of their regional executive and national committee.

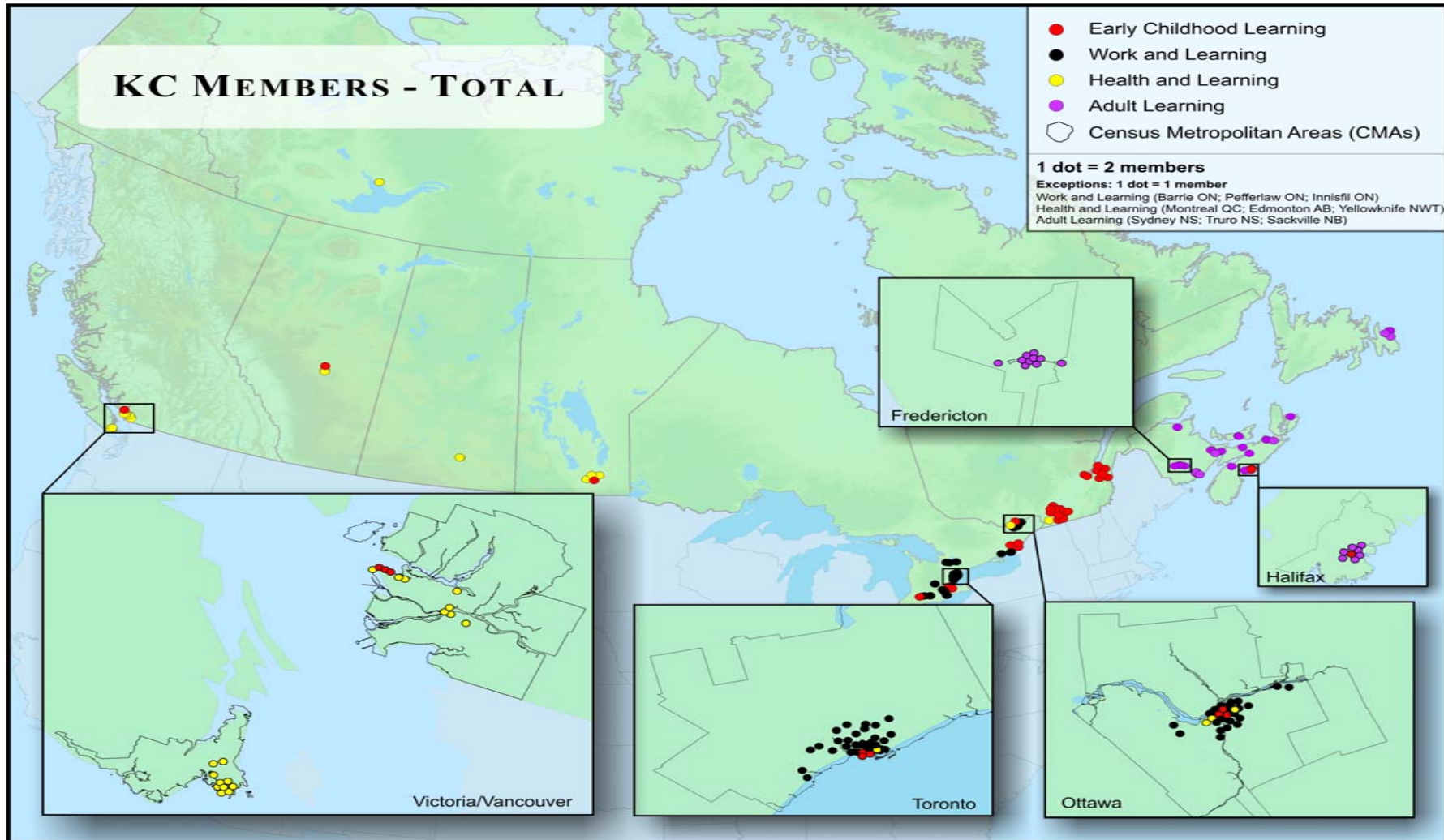
Table 2: Total Knowledge Centre Consortium members by KC, Regional Steering/Directing Members, and the National Advisory Members

Knowledge Centre	Members	Regional Steering/ Directing Committee	National Advisory Committee
Work and Learning	170	10	64
Adult Learning	70	8	21
Health and Learning	51	16	30
Early Childhood Learning	66	20	10
Total:	357	54	125

Source: CPM analysis of CCL data, August, 2006.

As can be seen, the KCs and their committees appear to have both a regional and pan-Canadian presence. The geographic location of these members is shown in Figures 7 through 9, which follow.

Figure 7: KC Members - Total



Source: CPM analysis of CCL data, 2006



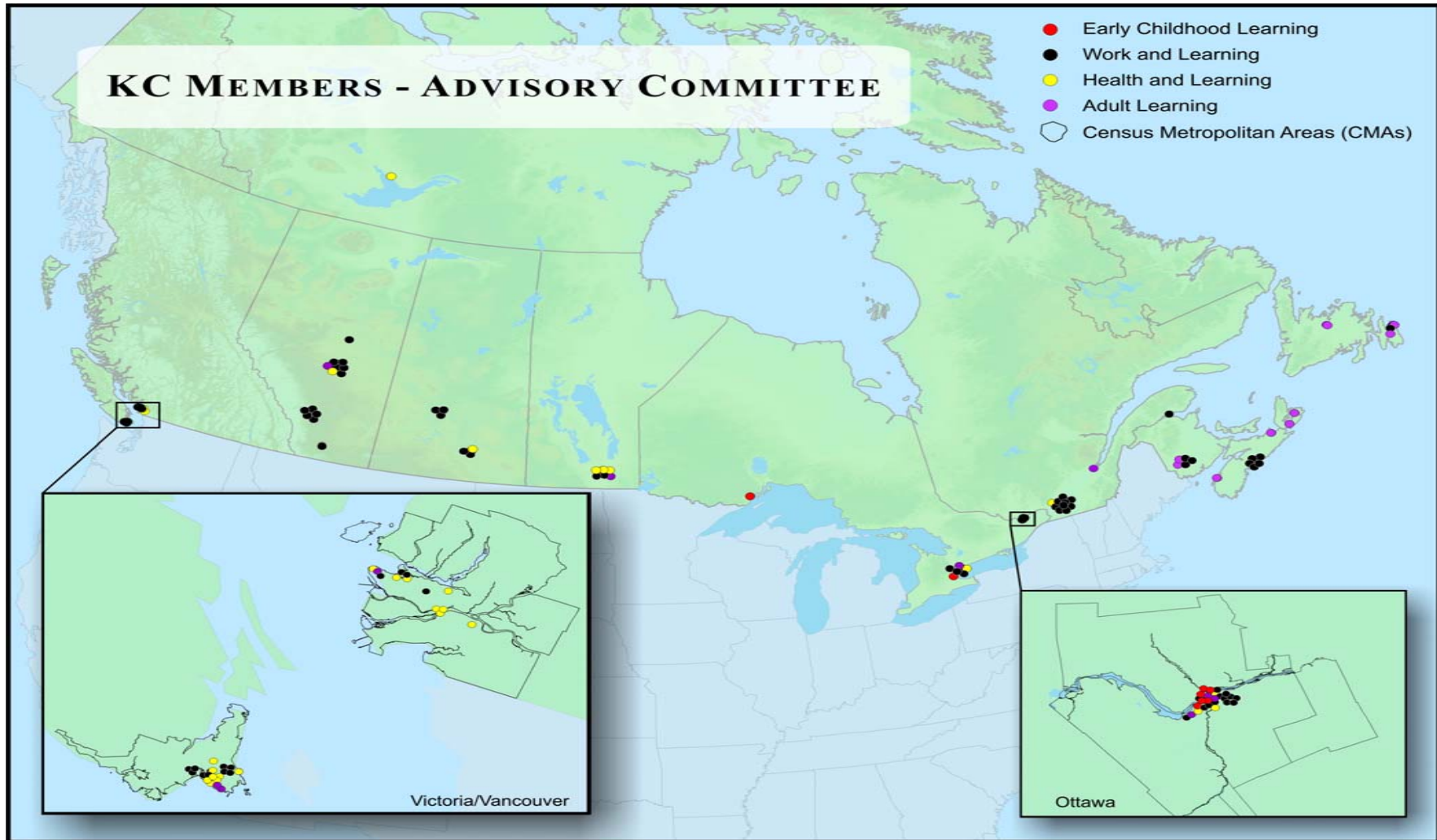
Figure 8: KC Members – Regional Steering Committee



Source: CPM analysis of CCL data, 2006



Figure 9: KC Members – National Advisory Committee



Source: CPM analysis of CCL data, 2006



Each of the four KCs we reviewed has been operational since autumn 2005, when CCL signed an agreement with four “lead agencies.” The lead agencies are responsible for the administration of the KCs. Soon after, full-time staff responsible for coordinating KC activities were hired in each KC. Each KC produced a Business Plan in April 2006, and has since produced monthly and quarterly reports.

We assessed the appropriateness of the design and the effectiveness of the accountability relationship between CCL and the KCs. We reviewed relevant documentation, such as plans, reports, and guidance documents. We also interviewed each coordinator, CCL staff of key directorates, and members of regional and national advisory committees. In addition, we surveyed or interviewed forty KC members selected to represent each KC and its membership and executive.

We were interested in the indicators and measurements outlined in Table 10, below.

Figure 10: Criteria for Good Accountability:

Description	Indicators	Measurements
Was there an appropriate design or structure of CCL's accountability? Was it effective?	Roles and responsibilities	Clear understanding of the roles and responsibilities – the duties, obligations, and related authorities – of parties in an accountability relationship
	Expected performance	Clear expectation for the goal for the funding
		Realistic expectations: balance between what is expected and what authorities and resources are available
	Reporting requirements	Clarity: on information to be reported by whom, to whom
		Fair and balanced reporting
		Information well defined, gathered, verified, and analyzed
	Mechanisms for review and adjustment	Clarity: who would review and adjust for performance and how
		How will improvements be made to performance and to the arrangement?
		How is the accountability process completed?

Source: Adapted by CPM from the Office of the Auditor General of Canada, 2003.

We found that most of the foundations for effective accountability relationships were in place. There was a clear specification of roles and responsibilities between CCL and the KCs and within the KCs in terms of their members, regional steering/directing committees, and national advisory boards.

The role of CCL with respect to the KC is that it is the chief contractual officer. It provides funding to the KC and makes clear its expectations for that funding by providing the KCs with practical guidelines and a general framework. The role of the KCs is to honour the contract with CCL by providing the services it agreed to



under the contract. These services include developing networks and facilitating knowledge exchange.

The KCs' consortium members develop and influence policy, and develop and support the activities of the work groups. The regional steering/directing committee is responsible for providing guidance and leadership to the learning centre. It establishes the work groups with clear mandates and expectations.

Lastly, the national advisory group is designed to ensure the involvement of pan-Canadian leadership in the development of the knowledge centres. It is to provide input and advice on research themes, potential consortium and/or work group members, and feedback on the KC reports.

The Business Plans were complete, but there was room for improvement in clearly specifying targets. For example, more precise timelines for achieving results, and more quantification in the number of workshops, the number of participants, or the number of groups that would be contacted. We believe that this additional specification of targets would be helpful in assessing performance against targets and in adjusting strategy or resources involved in achieving these targets.

The reporting of results, through monthly, quarterly, and annual (planned) reports, is well designed and is being implemented during this first year of operation. Finally, although there are plans in place for ongoing and annual mechanisms to 'review and adjust', these procedures have not been instituted except to note the progress being made in this first year of operation. CCL pays only on certification that the activity, event, or product has satisfactorily taken place or been produced.

Finally, the national advisory committees have not yet been fully established. One KC has yet to appoint the members officially, and others have had only preliminary organizational meetings. The KCs have plans in place to address this issue.

Based on the survey of 40 members, we found that the KCs were effective in establishing a network, in sharing practices and models, and in undertaking knowledge exchange activities. Most surveyed participants (over 80%) found the exercise 'useful or very useful,' and the most often cited examples of "why this was useful" was the network or information exchange activities. In addition, 55% of the people surveyed indicated that the reason for joining was because they felt they could contribute their expertise to the KC. The other main reason for people joining was that they shared a common interest in what their respective KC was working on.

Approximately one in five respondents indicated that it was too early to comment on certain general areas of the KC, such as the most successful initiative or

whether they had found their participation in the KC to be useful. When asked for suggestions for improvements, the most frequent suggestion was related to administrative issues, such as the speediness of communication and greater efficiency in conducting meetings.

Stakeholder Views. All stakeholders interviewed were aware of the KCs and 'somewhat aware' of their progress to date. A handful of stakeholders interviewed indicated that the KCs were 'the most significant achievement to date of CCL,' and that the areas identified were 'the key areas to be addressed in lifelong learning'.

Some indicated that there was not much communication yet outside the KC, an issue that will be taken up later in this report.

4.3.1.4 Systematic Reviews Case Study

Context

One of the primary tenets of CCL's mandate is to generate and disseminate knowledge that provides Canadians with the most current information about effective approaches to learning. To tackle this issue, CCL has focussed on conducting systematic reviews, the most up-to-date and preferred method by which to answer pertinent questions in any body of research literature.

Systematic reviews accomplish this goal by summarizing large bodies of scientific evidence through the application of objective strategies to assemble, appraise, and synthesize all relevant studies that address a specific research question. This technique has been embraced by other social science disciplines, as well as by medicine and health professionals. Given the scope of our review, and the centrality of systematic reviews to the fulfilment of the CCL mandate, we thought it was essential to examine their approach in this area more thoroughly.



Scope

All relevant documentation was reviewed to explore the CCL approach to conducting systematic reviews. This involved an in-depth analysis of:

1. The PowerPoint training program for key stakeholders and interested parties;
2. The coding manuals and procedures (e.g., inclusion/exclusion criteria, coding, key word search strategies, etc.); and
3. The first CCL client report on adult literacy, chosen because one of CCL's cross-cutting themes is adult literacy.

It should be noted that a complete and universally-accepted approach to conducting systematic reviews currently is unavailable. We compared the CCL approach to best practices in the field of systematic review.

Observations

Overall, the CCL materials we examined were well designed. However, there are two areas where we believe that improvement would help strengthen their approach to systematic reviews:

1) Presenting study findings

In the adult literacy report, despite the amount of effort that went into designing the review protocol and coding the effects, the information in the Results section was not summarized.

This was done to avoid combining a heterogeneous group of studies, but doing so is one of the advantages of accepted meta-analytic practice, the most common type of systematic review. Furthermore, rather than choosing one method of presentation over another, a summary table could be provided at the outset, with a caveat outlining the potential limitations – for example, extreme heterogeneity – followed by a list of the studies, as was done in the report.

If systematic reviews are the method of choice, maximizing their potential strengths – for example, by aggregating the existing research data – is important. On a related point, there is little discussion of this issue in either the internal CCL materials or their PowerPoint training module. Given the importance of results presentation to the success and uptake of any systematic review, CCL may want to provide such additional information.

2) Providing additional information

Additional information could be provided about how to conduct systematic reviews once relevant studies have been identified. Although all three document sources provided significant detail relating to how to identify, search, and retrieve relevant studies, there was relatively little guidance given in terms of how to translate these search efforts into a final product – for example, strategies to calculate an effect size, present results, and write the report.

Admittedly, the breadth of the research questions tackled by CCL will be exceptional, and will be heavily influenced by client interactions. Despite this, it would be beneficial to provide more information to help prospective reviewers and users of the information.

4.3.1.5 Results reporting

A key tenet of effective results-based management is the measurement, reporting, and use of results.

A basic foundation of results measurement is a logic model that identifies the set of related activities and shows the chain of results connecting activities to final outcomes. It is intended to make reasonably clear the connections between the activities, outputs, and outcomes, and in doing so to help build a results-based or performance measurement system that efficiently measures the progress of each component of this results chain.

Developing performance measurement systems is a difficult process. It requires a clear understanding of the structure of a good performance measurement and reporting system. One commonly used structure is shown in Table 3, which follows:

Table 3: Model for Rating Performance Reports

<p>Organizational context and strategic outcomes are clear</p> <ul style="list-style-type: none">▪ Planned strategic outcomes are aligned with CCL's operating environment, its mandate, mission and relevant risks▪ They indicate how CCL and its key partners will contribute to the strategic or ultimate outcomes <p>Performance expectations are clear and concrete</p> <ul style="list-style-type: none">▪ Statements of performance expectations are expressed as outputs and outcomes with a direction, an amount of change, a timeframe and a strategy for achieving planned targets <p>Key results are reported against expectations</p>



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- Key results are expressed as outputs and outcomes that contribute to each of the planned strategic outcomes with results that are aligned with performance expectations. They are increasingly accompanied by challenges, attribution, and resource information

Performance information is credible and balanced

- Performance information is supported by reliable sources and information on data quality
- The performance information presented includes a balance between successes and shortcomings

Use of performance information is demonstrated

- Performance information is used to manage and improve future performance

Source: Adapted by CPM from the Office of the Auditor General of Canada, 2003

We reviewed CCL's Annual Report and Business Plan, its website, and a variety of internal reports. The latter included the 'activity matrix', a report to CCL's management committee and the Board that lists, by responsibility centre, the activities and deliverables.

We examined the degree to which relevant information on the results – both internal and external – is gathered and used to make decisions, and the degree to which public reporting is balanced, transparent, and easy to understand.

As yet, CCL does not have a fully developed system of results measurement and reporting. CCL is in the early stages of actually delivering results that could be measured and reported. As CCL moves into the next phase of its mandate, it will need to focus more clearly on measuring, using, and reporting on the results of the investment it has made in its infrastructure and planned activities. Results measurement, reporting, and use are of critical importance for any organization. They are particularly important for organizations, such as CCL, that are at arm's length but still rely on the government for an initial infusion of funding.

We recommend that CCL develop performance measures, using as a guide its logic model as well as generally accepted criteria for good performance measurement and management systems.

4.3.2 Observations: Has CCL achieved its expected progress?

CCL has come a long way in two and a half years. The question is, given where they started, the resources they had available, and the reality of working within the Canadian federation, have they achieved what one would reasonably expect?

For an answer, we turn to those involved in the original design and those involved in the consultations on what CCL should be and how it should achieve its goals. These include key senior federal government officials and those involved in consultations with the provinces and other key stakeholders.

Generally, the conclusion is that the progress has been reasonable. It was expected that there would be some difficulties manoeuvring through jurisdictional issues, recruiting a talented and credible staff, setting up an infrastructure that represented both regional and pan-Canadian interests, and addressing a myriad of other problems both tractable and intractable.

In 2004, the Council of Ministers of Education, Canada, issued a statement saying that the funds “would be better spent elsewhere”. That remains their official position today, despite efforts on behalf of CCL and others to encourage collaboration. Some provinces do not have any activities with CCL. Others have agreements in place, or almost in place. Still others have had a very successful relationship with CCL.

This same view is shared by key stakeholders in the lifelong learning community. Business, health, early childhood, and adult stakeholders indicate that the progress to date has been “as expected”. Some indicate that it has been much greater than expected. A few feel it has been less than they expected.

4.3.3 Observations: Is CCL likely to achieve its expected outcomes?

The observations reflecting future expectations are an extension of the observations on the progress to date. The federal government, most provincial and territorial governments, and most key lifelong learning stakeholders feel that, due to the calibre of people at CCL, the kinds of activities planned, and the amount of resources and time available, significant progress will be made on achieving CCL’s near-term outcomes.

Nevertheless, one key area where there is a consensus is that CCL must focus on delivery of the products and activities planned as soon as possible, and particularly must integrate within those activities a Communications and Outreach strategy that effectively mobilizes the plethora of stakeholders involved in lifelong learning. Without this support being manifested by these stakeholders in the next few years, few stakeholders feel that CCL can fully achieve its short- and medium-term outcomes.



Appendix 1: List of Evaluation Panel Members and Interviewees

1.1 Formative Evaluation Advisory Panel – Members and Observers

Panel Members

Name and Title	Organization
Denis Desautels Executive-in-residence	School of Management University of Ottawa Ottawa, Ontario
David Gough Executive Director and Professor	Social Science Research Unit Institute of Education London, England
Barry McGaw Director and Consultant	Melbourne Education Research Institute University of Melbourne McGaw Group Pty Ltd. Melbourne, Australia
Jacquelyn Thayer Scott Professor and Deputy Chair	Cape Breton University Prime Minister's Advisory Council on Science and Technology (Canada) Cape Breton, Nova Scotia
David Zussman Jarislowsky Chair	Public Sector Management University of Ottawa Ottawa, Ontario

Panel Observers

Elizabeth Murphy-Walsh Director General	Human Resources and Social Development Canada Ottawa, Ontario
Charles Ungerleider Director of Research and Knowledge Mobilization	Canadian Council on Learning Vancouver, British Columbia

List of Interviewees

1.2 Canadian Council on Learning – Board of Directors

Name and Title	Location
Robert Giroux, O.C. Board Chair	Ottawa, Ontario
Larry Booi Board Member	Edmonton, Alberta
Aldéa Landry, QC, O.C. Board Member	Moncton, New Brunswick



1.3 Canadian Council on Learning – Staff

Name and Title	Location
Paul Cappon President and Chief Executive Office	Ottawa, Ontario
Beth Everson Director of Communications	Ottawa, Ontario
Douglas Hodgkinson Director of Strategic Initiatives and Liaison	Vancouver, British Columbia
Charles Ungerleider Director of Research and Knowledge Mobilization	Vancouver, British Columbia
Marc Lachance Associate Director of Monitoring and Reporting	Ottawa, Ontario
Jean Moss Associate Director of Human Resources and Administration	Ottawa, Ontario
Robert Patry Associate Director of Strategic Initiatives and Liaison	Ottawa, Ontario
Jerry Rankin Chief Financial Officer	Ottawa, Ontario
Daryl Rock Associate Director of Knowledge Exchange	Ottawa, Ontario
Zohreh Zadeh Senior Research Assistant	Research and Knowledge Mobilization Vancouver, British Columbia
Terri Thompson Research Analyst	Research and Knowledge Mobilization Vancouver, British Columbia
Tracy Lavin Senior Research Assistant	Research and Knowledge Mobilization Vancouver, British Columbia



1.4 Key Provincial and Territorial Stakeholders

Name and Title	Organization
Tom Vincent Assistant Deputy Minister	Ministry of Advanced Education British Columbia
Dr. Emery Dosdall Deputy Minister	Ministry of Education British Columbia
Bonnie Durnford Deputy Minister	Department of Advanced Education and Employment Saskatchewan
Larry Steeves Assistant Deputy Minister	Department of Learning Saskatchewan
Dwight Botting Acting Deputy Minister	Department of Advanced Education and Training Manitoba
Gerald Farthing Acting Deputy Minister	Department of Education, Citizenship, and Youth Manitoba
Ben Levin Deputy Minister	Ministry of Education Ontario
Philip Steenkamp Deputy Minister	Ministry of Training, Colleges, and Universities Ontario
Roger Doucet Sous-ministre	Ministère de l'Éducation Nouveau-Brunswick
Rachel Bard Deputy Minister Post Secondary Division Charles Ayles Assistant Deputy Minister Brenda McCavour Senior Advisor	Department of Post Secondary Education and Training New Brunswick
Marian Fushell Assistant Deputy Minister	Primary, Elementary and Secondary Education Branch Newfoundland
Dan Daniels Deputy Minister	Education, Culture and Employment Northwest Territories
Ken MacRae Senior Director	Higher Education and Corporate Services, Prince Edward Island



1.5 Federal Government Stakeholders

Name and Title	Organization
Neil Bouwer, Director General Satya Brink, Director Patrick Bussière, Senior Research Officer	Learning Policy Directorate Human Resources and Social Development Canada Gatineau, Québec
James van Raalte Senior Policy Analyst	Social Development Policy Privy Council Office Ottawa, Ontario
Iain Stewart, Director General Mary Carman, Assistant Deputy Minister	Innovation Policy Branch Industry Canada Ottawa, Ontario

1.6 Non-Government Stakeholders

Name and Title	Organization
Don Avison President	The University Presidents' Council of British Columbia Victoria, British Columbia
Gil Rémillard Avocat-Conseil	Fraser Milner Casgrain s.e.n.c.r.l. Montréal, Québec
Gary Rabbior President	Canadian Foundation for Economic Education Toronto, Ontario
Annie Kidder Executive Director	People for Education Toronto, Ontario
Gerry Brown President	Association of Canadian Community Colleges Ottawa, Ontario
Terry Anne Boyles Vice President	Association of Canadian Community Colleges Ottawa, Ontario
Ivan Fellegi Chief Statistician	Statistics Canada Ottawa, Ontario
Carole Brabant Secrétaire général Adjointe à la PDG	Fonds québécois de la recherche sur la société et la culture Montréal Québec
Charles Pascal Executive Director	Atkinson Foundation Toronto, Ontario
George Godwin Managing Director	Historica Foundation Toronto, Ontario
Irv Rootman Professor of Public Health Sciences Former Director of Centre for Health Promotion	Centre for Community Health Promotion Research, University of Victoria Victoria, British Columbia



Dan Marriott Coordinator	Vancouver School Board Vancouver, British Columbia
David Livingstone Professor	Ontario Institute for Studies in Education University of Toronto Toronto, Ontario
Shirley Seward Chief Executive Office	Canadian Labour and Business Centre Ottawa, Ontario
Peter J. Nicholson President	Council of Canadian Academies Ottawa, Ontario
Norman Riddell Executive Director and Chief Executive Officer	Canada Millennium Scholarship Foundation Montréal, Québec

1.7 Knowledge Centre Coordinators

Name and Title	Knowledge Centre/Centre du savoir
François Lamontagne Coordinator	Work and Learning, Canadian Labour and Business Centre Ottawa, Ontario
Robert Aucoin* Coordinator	Health and Learning, University of Victoria Victoria, British Columbia
Kathleen Flanagan* Coordinator	Adult Learning, University of New Brunswick Fredericton, New Brunswick
Claire Gascon Giard Coordinnatrice	L'apprentissage chez les jeunes enfants, Université de Montréal Montréal, Québec

*CCL employees



List of Knowledge Centre Members Surveyed and Interviewed

1.8 Knowledge Centre Members – Work and Learning

Name and Title	Organization
Bonnie Kennedy Executive Director	Canadian Association for Prior Learning Assessment Ottawa, Ontario
Patrice de Broucker Senior Research Analyst	Canadian Policy Research Networks Ottawa, Ontario
Askin Taner Public Policy Analyst	The Ontario Literacy Coalition Toronto, Ontario
Janet Murphy Project Manager, CANARIE: ABEL	Vice-President Research and Innovation York University Toronto, Ontario
Patrick Merrien Manager, Essential Skills	Association of Canadian Community Colleges Ottawa, Ontario
Ed Wong Vice President - Education Partnerships	Business Council of British Columbia Vancouver, British Columbia
Gail Larose National Coordinator	Canada Career Information Partnership Ottawa, Ontario
Robin Millar Executive Director	The Centre for Education & Work Winnipeg, Manitoba
Charles Ramsey Executive Director	National Adult Literacy Database Fredericton, New Brunswick
Ron Torgerson Coordinator Work Place Essential Skills	Saskatchewan Federation of Labour Regina, Saskatchewan
Christine Wihak Assistant Professor	Education, Teacher Preparation Workplace & Adult Learning Division of Faculty of Education University of Calgary Calgary, Alberta
Joy Van Kleef Chief Executive Officer	Canadian Institute for Recognizing Learning Toronto, Ontario
Lynn Johnston Executive Director	Canadian Society for Training & Development Toronto, Ontario



1.9 Knowledge Centre Members – Adult Learning

Name and Title	Organization
Tim Andrew Chair of Monitoring and Reporting	The Third Age Centre Fredericton, New Brunswick
Joan Hicks Member of the Board of Directors	Metro Council on Continuing Education Dartmouth, Nova Scotia
Judith Holton Director of Research and Innovation	Holland College - Office of Research and Innovation Charlottetown, Prince Edward Island
Rick Hutchins Animator	Policylinks New Brunswick Keswick Ridge, New Brunswick
Gerona McGrath Manager, Design, Development, and Production, Department of Distance Education and Learning Technologies	Memorial University Newfoundland Distance Education St. John's, Newfoundland
Charles Ramsey Executive Director	National Adult Literacy Database (NALD) Fredericton, New Brunswick
Judith Potter Executive Director	College of Extended Learning University of New Brunswick Fredericton, New Brunswick
Rod Savoie Agent du Conseil de recherches, Apprentissage électronique Research Council Officer e-learning	Conseil national de recherches Canada National Research Council Canada Moncton, New Brunswick
Jim Sharpe Dean of the Board of Directors	Mount St. Vincent University Halifax, Nova Scotia

1.10 Knowledge Centre Members – Health and Learning

Name and Title	Organization
Anita Ferris Faculty member of Early Childhood Education	Camosun College Victoria, British Columbia
Joan Wharf Higgins Scientific Advisor	University of Victoria, Victoria, British Columbia
Alison Preece Full-time faculty member	University of Victoria Victoria, British Columbia
Kerrie Strathy Division Head	Seniors' Education Centre University of Regina Regina, Saskatchewan
Elinor Wilson Chief Executive Officer	Canadian Public Health Association Ottawa, Ontario
Jannitt Rabinovitch Independent Consultant	Victoria, British Columbia
George Eisler Chief Executive Officer	British Columbia Academic Health Council Vancouver, British Columbia
Jan Lindsay VP Education	Douglas College Vancouver, British Columbia
Hélène Grégoire Conseillère principale en politiques	Bureau de la participation des parents Direction des services régionaux Ministère de l'Éducation de l'Ontario Toronto, Ontario



1.11 Knowledge Centre Members – Early Childhood Learning

Name and Title	Organization
Don Jamieson Scientific Director	Canadian Language & Literacy Research Network University of Western Ontario London, Ontario
Anne Maxwell Senior Director of Projects Program and Services	Canadian Child Care Federation Fédération canadienne des services de garde à l'enfance Ottawa, Ontario
Jane Bertrand Executive Director	Council for Early Child Development Atkinson Centre for Society and Child Development Dept. of Human Development and Applied Psychology Ontario Institute for Studies in Education of the University of Toronto Toronto, Ontario
Leanne Boyd Director, Policy Development, Research and Evaluation	Healthy Child Manitoba Enfants en santé Winnipeg, Manitoba
Carol Crill Russell Vice President, Research and Programs	Invest in Kids Investir dans l'enfance Toronto, Ontario
Marjolaine Sioui Gestionnaire des opérations	Commission de la santé et des services sociaux des Premières Nations du Québec et du Labrador Wendake, Québec
Emmel Francoeur Assistant Professor	Child Development Program Montréal Children's Hospital McGill University Montréal, Québec

Amélie Petitclerc Committee Manager	Groupe de Recherche et d'intervention Psychosociale École de psychologie Université Laval Québec, Québec
Nathalie Moragues Coordinateur	Groupe de recherche et d'intervention psychosociale Early Childhood Learning Knowledge Centre Université de Montréal Montréal, Québec





Appendix 2: List of Key Documents

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