

Our Voice

Community Literacy of Ontario

**80 Bradford Street
Suite 508**

**Barrie, Ontario
L4N 6S7**

Tel: 705-733-2312

Fax: 705-733-6197

www.nald.ca/clo.htm

clo@bellnet.ca



INSIDE THIS ISSUE:

CIPMS: How's it Going?	1-3
CIPMS Online and Interactive	4-5
Environmental Scans	5
Organizational Capacity in LBS Agencies	6
New Organizational Capacity Resources	6
Additional Resources	7
CLO's CIPMS Resources	8

CIPMS: How's it Going?

Literacy and Basic Skills agencies are well into the second year of implementing the Continuous Improvement Performance Management System (CIPMS). Now is a good time to step back and ask ourselves some questions about how it is going. After all, monitoring progress is an important part of CIPMS.

Joyce Bigelow is the Executive Director of Northern Connections Adult Learning Centres in Frontenac County. Both the staff and board at Northern Connections are actively involved in implementing CIPMS and believe it has great benefits for their agency. In the following article, Joyce ponders and responds to three key questions. She also shares some of the lessons Northern Connections has learned about performance management, and she offers some tips and ideas that other literacy agencies might find helpful.

CIPMS and Northern Connections Adult Learning Centres

By Joyce Bigelow

When I take a look back at what we have accomplished since we first began to implement CIPMS concepts in our agency, three questions come immediately to mind:

1. *Is this worthwhile or is this just another load on our shoulders?*
2. *How do we decide what to improve and how to manage it?*
3. *Does the attention spent on CIPMS detract from what else we do?*

To the first question, our agency answered: "Yes, it's worthwhile, because performance management isn't just about meeting MTCU mandates. It is a useful process to improve service to our clients and thereby our reputation. What could be more important?"

How did we decide what to improve and how to manage it? We started with a strategic plan done several years ago that determined various areas for improvement in our agency.

(Continued on page 2)

Northern Connections identified the following areas for improvement:

- ◆ Organizational Health and Sustainability
- ◆ Marketing
- ◆ Staff Efficiency and Effectiveness
- ◆ Client Satisfaction
- ◆ Programming – Employment/Workforce and Essential Skills
- ◆ Governance
- ◆ Health and Safety
- ◆ Community Value
- ◆ Learner Skill Attainment

From these areas, we developed a list of indicators that would reflect good performance. Web research produced sample indicators that we could consider as options, like Compass Point's Organizational Dashboard at www.compasspoint.com/content/index.php?pid-208. Also, I learned (although we are still working on this) that an indicator should be:

- ◆ *Manageable*: Gather enough data without overload. It is about quality, not quantity.
- ◆ *Relevant*: Does it measure what you want? Does it relate to the desired outcome?
- ◆ *Meaningful*: Does the indicator tell you something? Does it fit into the larger picture?
- ◆ *Measurable/quantifiable*: If it can't be measured, it can't be analyzed.
- ◆ *Well-defined*: Is it clearly stated and defined? Is it comparable year-to-year?
- ◆ *Matched to outcomes and objectives*: Will it show if outcomes have been met? Indicators should relate to the strategic objectives of the organization's decision makers (i.e. the board of directors).

To develop the indicators, we asked ourselves "what would show strength" in the various areas. Then we determined where, how and if we could get data or other evidence on those indicators. We created a table format with the following headings:

- ◆ Strategic Area
- ◆ Indicator
- ◆ Type of Indicator
- ◆ Data Required
- ◆ Source of Data
- ◆ Action Required
- ◆ By Whom
- ◆ By When (or Completed)



Our list of 32 indicators seemed intimidating. So, our board, with staff, learner and stakeholder input, selected five of the "strategic areas" that were greater priorities. Simultaneously, we prioritized our indicators, colour-coding the chart with different font colours (e.g., red for top priority, etc.). Then, we gathered more information to determine where we were already successful and where we should improve.

This process allowed us to break down a large number of goals into manageable pieces and work on the "critical few" first. Because program management is continuous, we aren't trying to do everything in one year. By choosing a few priorities and leaving others for the future, we can set up tracking methods and systems that will continue over time.

All this activity happened just around the time that Northern Connections had to do our first year of CIPMS business planning, so we were able to move two of our priority indicators right into the LBS plan. This year we have been able to attend to two more of our five priorities.

For example, the strategic plan determined improved marketing to be an area needing attention and set our potential marketing indicators as:

- ◆ The number of flyers and ads in papers
- ◆ The number of clients responding to those ads
- ◆ Increased number of volunteers
- ◆ Increased number of target group
- ◆ Increased number of employer contacts

This year for our LBS business plan, we set an objective of *“improved marketing using ads, flyers and posters, leading to increased number of clients reporting marketing was the reason they contacted us.”* We plugged this into the business plan form, established quarterly milestones and sent it off. Next was getting staff commitment to assist with the plan. To continue with the example of improved marketing above, here is what our staff committed to do:

- ◆ We will be more diligent in asking clients how they heard about us and noting if it was in response to our marketing strategy
- ◆ We will create a tracking sheet to log number of new clients responding to ads

I learned from CLO’s Performance Management training (<http://clo.alphaplus.ca/>) that getting staff ideas, input and “buy-in” stops it from being a top-down or one-person-led process. Having staff constantly tracking and providing input takes it from a “special” activity to an ongoing, day-to-day routine.

As to the last question, “Does CIPMS take away from our service?” Our conclusion was that it does not. In fact, performance management adds to and improves what we do. It increases the value of our services, if done with thought, planning and direction. As CLO’s Performance Management Training showed us, performance management is not a one-time, all-inclusive activity. Rather, it is a strategic, methodical, ongoing process.

I must say that during the first year, we felt like we still had to do the activity just to please MTCU with “successful” results. So, we picked targets for them that were easily achieved. Now, I feel that even if we don’t reach our goals, it is the process of learning and improving in the context of our mission, vision and mandate and ALL our stakeholders that matters. Joanne Kaattari, CLO’s Executive Director, said it best, “ It’s important to remember that successes can be made as you move towards your goal, not just at the end. Monitoring progress is very important. CIPMS also helps you identify what isn’t working well and why.”

The biggest thing that program management has done for me is to provide a focus to improving our service. Through this process, I have discovered I can work with my board, staff, clients and funder to observe our program in the context of our community. We can set our own objectives and evaluate them to move ahead. All this and pleases MTCU as well! What more could we ask?

CIPMS: Online and Interactive

Have you Moodled today?

As part of its *CIPMS: Online and Interactive* project funded by Employment Ontario in 2008/2009, Community Literacy of Ontario created an online Performance Management course using Moodle, which is software that provides a user-friendly online classroom. During the month of May, CLO staff actively facilitated the online classroom which boasted a number of interactive features including online activities, discussion groups, quizzes and live chats.



Although we are no longer facilitating the Moodle classroom, we have adapted it to offer a self-study training site for one and all. Many of the more popular features remain including interviews (both in YouTube and audio format) with Ontario literacy practitioners along with links to valuable resources and websites. We have also included a case study to help illustrate how CIPMS principles might be implemented in a “typical” literacy agency.

Our online Performance Management course provides a wealth of CIPMS-related information in one easy-to-access and easy-to-use site. Having all of the information in one place will benefit literacy agencies and anyone interested in implementing performance management concepts in their organization. They will be able to see how all of the components of this system come together to form a continuous and seamless process of identifying strengths and weaknesses and priorities for action with accompanying goals and targets for achievement. Once goals and targets are set, they can be monitored and further action taken to ensure that they are met.

For example, one module in our CIPMS course overviews agency assessment. Agency assessment is about taking the time to step back and take a close look at what your agency has accomplished. By understanding the results that have been achieved and what factors brought about successes and challenges, agencies can determine where their efforts should be focused in the coming months and years to set the stage for continuous improvement. This process can help organizations recognize their own potential and make their own decisions about how to continue to achieve success and how to address any challenges they might face. Agency assessment also provides us with the tools and perspectives we need to regularly reflect on our performance and to improve and adapt our plans and activities as needed so that we can continue to be the best we can be for all of our stakeholders.

Agency assessment should take all stakeholders’ needs and concerns into consideration. This information can be gathered in many ways. Literacy practitioners can attend community meetings to identify local concerns. They can review environmental scans and other reports. Information can also be gathered by asking stakeholders (including both current and former learners, volunteers, board members, other literacy agencies, referral agencies and the general public) for their input about the literacy programming that is currently being offered and any potential gaps in service. These questions can be asked by holding a focus group, sending out an email survey or conducting telephone interviews. How many people you ask and how you gather that information will depend on your agency’s capacity .

It is important, however, to make an effort to gather as much information from stakeholders as you can because this can help you determine priorities for setting future goals and targets. It is also important to remember that while you are gathering feedback, you will be using that information to make decisions. Be sure to ask questions that go beyond simply finding out if stakeholders are satisfied or not with the work your agency is doing. Finding out why they are (or are not) satisfied will help you determine what you are doing well and what needs to be improved. In short, turn the data you gather into decisions!

When conducting agency assessment and identifying strengths, weaknesses and priorities, it is important to think about where your agency is in its development. A new organization will likely identify different areas for growth and change than a more established one will. For example, an agency that is new in a community might focus on recruiting students and establishing partnerships. An agency that already has strong partnerships might focus on further targeting programming to meet specific training needs identified by both learners and the community. Another agency might find itself with a changing client base and will need to adjust its programming, perhaps by offering training at different times or in a different location.

There are no “right” answers when it comes to agency assessment. Each agency will need to discover for itself what it does well and where it needs to improve. Each agency will also need to determine what steps it can take, given its resources and capacity, to make any changes. Some goals will be relatively easy to achieve, others will take more time and effort.

You can read more about agency assessment, the process of gathering data, setting goals and targets, and monitoring progress – along with a whole host of other topics – at CLO’s online Performance Management training site.

Check out our online classroom today at <http://clo.alphaplus.ca>.

Environmental Scans

Part of strategic planning and agency assessment involves looking at what is happening in your community and how your literacy agency can respond to local events. Are there new industries and businesses openings that will require new skill sets? Are there changing employment opportunities? Are companies downsizing? If so, can your agency provide training to help people in your area be better prepared for the coming changes?

One way to identify some of the trends around changing skills needs in your area is to check with your Local Board. Most Local Boards produce a variety of reports and environmental scans that can provide you with some of the information you are looking for. Be sure to visit the Local Boards Network at www.localboards.on.ca where you can link to your Local Board.

Another good source of local information is available at iWin, the Individual WorkinfoNet Portal at www.iwin.on.ca. You can search for local information about education and learning, career planning, job opportunities and more.

Organizational Capacity in LBS Agencies

In earlier CIPMS bulletins, CLO shared some organizational capacity resources that focused on financial capacity which is definitely an area we are all concerned about. However, there is more to organizational capacity than dollars and cents. There are other areas to think about including human resources and board governance.

Even if your literacy agency is small with only two or three people on staff, you still need to think about human resources. For example, do you have a written personnel policy? If so, does it include details about not only the basics such as vacation and benefits, but does it also address special circumstances like leaves of absences, jury duty, bereavement or paternal leave? Do you have written policies and procedures for how to recruit and hire new employees?

Many literacy agencies are governed by a board of directors. It is important to have written guidelines about the board's role and governance practices. Not only can this be helpful in terms of ongoing program management, but it can be very useful for recruiting new members to the board because you can provide them with clear expectations and responsibilities.

One of the jobs of the board of directors is looking to the future, and this includes another key human resources issue: succession planning. Is your agency prepared if a key staff member were to resign in the near future? Although many of us have worked in our literacy agencies for a number of years, we won't always be there. It is important to think about potential staff changes and be prepared so that you aren't taken by surprise.

Succession planning should also include planning for changes to the Board of Directors. How will you replace Board members who resign or whose term expires? Does your agency actively recruit new Board members? If so, do you look for particular skills or do you look for someone who might be able to help your agency establish or foster a partnership? In late fall 2009, Literacy Link South Central will post its newly created guide to succession planning in literacy agencies on its website at: www.llsc.on.ca

New Organizational Capacity Resources from CLO



Be on the lookout for two new resources from CLO to help you with human resources, board governance and with organizational capacity in general.

CLO is developing a new module for its Literacy Basics (www.nald.ca/literacybasics) self-study training site. This module will focus on Board Governance and will be available in December 2009. Watch for it!

In addition, CLO will be hosting a two-day Organizational Capacity Institute for community literacy agencies in November 2009. Watch your inbox! We will be sending out more information to our members in the near future about this exciting opportunity. We will also be researching and writing a resource guide on organizational capacity in 2009-2010.

Additional Performance Management Resources

Performance Management is not unique to Literacy and Basic Skills agencies. Performance management concepts and practices are used around the world by not-for-profit agencies, by corporations and businesses large and small, and by governments and government agencies.

Although Community Literacy of Ontario and other literacy agencies have provided training and resources about performance management, you can also find many other resources that are readily available thanks to the Internet. Here are just a few links that you might find useful:

Performance Management—Basic Concepts

The information on this site was written by Carter McNamara, who is well known for his useful guides about all aspects of program management. The site includes good basic information as well as a number of practical examples and links to further resources. It's well worth a visit.

See: http://managementhelp.org/perf_mng/perf_mng.htm.

Podcasts

Have you ever downloaded a podcast? Podcasts can be audio or video files that you download to your computer and watch or listen to at your convenience. They can be loaded on to computer, your iPod, your laptop, your cellphone and other mobile devices. Many people find podcasts a great way to keep informed. For a series of interesting podcasts about performance management, be sure to check out the podcasts from Actuate.com at: www.actuate.com/resources/assets/?articleid=14247.

Performance Management Planning

How can you resist a site called Big Dog's Continuous Process Improvement Page? Be sure to check out www.nwlink.com/~Donclark/perform/process.html for some step-by-step performance management planning.

MTCU Resources

MTCU has provided an Agency Assessment Guide (www.nald.ca/library/learning/mtcu/guide/guide.pdf) and Tool (www.nald.ca/library/learning/mtcu/tool/tool.pdf) to help LBS agencies work through the process of assessing their strengths and weaknesses, identifying and prioritizing areas for improvement, and creating and monitoring agency action plans.

Efficiency Tool

For another example of how to work through this process, be sure to check out this British site from the National Audit Office (www.nao.org.uk/nao/efficiency/toolkit/index.htm). Although they call their process an "efficiency tool", it is very similar to the agency assessment process being used in LBS and it provides agencies with additional resources to help them with both planning and implementation.

Legal Check-Up

Have you ever wondered about your organization's legal health? Now is a good time to take a health check. Check out the Volunteer Lawyers Service for their 10 Point Legal Risk Checkup and their 8-Point Board Governance Checkup. Both documents are available at www.volunteerlawyers.org/gethelp/item.10Point_Legal_Health_Checkup.

CLO's CIPMS Resources

CLO's BOARD OF DIRECTORS

- Carynne Arnold (Kingston)
- Debra Barrett (Toronto)
- Chris Benninger (Chatham)
- Linda Conley (Picton)
- Elizabeth Debergh (Wellington County)
- Susan Hughes (Haileybury)
- Barbara McFater (Toronto)
- Bert Providence (Toronto)
- Marsha Roadhouse (Belleville)
- Lynne Zuliani (Wawa)

CLO's STAFF

- Joan Beaudry (Administrative Assistant)
- Robyn Cook-Ritchie (Project Staff)
- Jette Cosburn (Co-Executive Director)
- Joanne Kaattari (Co-Executive Director)
- Vicki Trottier (Project Staff)

AUGUST CIPMS BULLETIN

Writing: Joyce Bigelow and Vicki Trottier

Editing: Jette Cosburn and Joanne Kaattari

FUNDER

Community Literacy of Ontario is funded by
the Ontario government, under

**EMPLOYMENT
ONTARIO**

Over the past two years, Community Literacy of Ontario has developed exemplary resources to help you implement CIPMS in your agency. We have created these resources in a variety of formats so that you can use the ones that best suit your needs.

- ⇒ *The ABCs of CIPMS*. This comprehensive manual was produced by CLO in 2008 and can be downloaded from our website at www.nald.ca/clo/resource/cipms/cipms.pdf.
- ⇒ *CIPMS Online Module*. You can find an online self-study training module on CLO's Literacy Basics website. See: www.nald.ca/literacybasics. While you are there, be sure to check out our other modules.
- ⇒ *CIPMS Online Workshop*. In 2008, CLO delivered live online and face-to-face workshops to literacy agencies across Ontario. Our CIPMS workshop has been recorded online and is available for you to listen to at your convenience. You can access the recorded version of this two-hour workshop at: www.nald.ca/clo/resource/cimps_centra/cimps_centra.pdf
- ⇒ *Performance Management Online Training*. In 2009, CLO created this online interactive classroom using Moodle software. This training resource brings together a wealth of CIPMS information in one location. You can find the classroom at <http://clo.alphaplus.ca>.
- ⇒ *E-communiqués and bulletins*. CLO has written a number of informative e-communiqués and bulletins on CIPMS over the past two years. All of these documents are available on our website at www.nald.ca/clo. Just click where it says "Newsletters" or "E-communiqués".

