



Resource Kit

THE COMMUNITY LEARNING CENTRE

Framework for Action

for Anglophone Schools, Centres and Communities
(Revised Edition)



Holistically planned action for
educational and community change

The Community Learning Centre



Holistically planned action for educational and community change

A series promoting educational success and the development of the Anglophone community in Québec.

The CLC Resource Kit: Framework for Action for Anglophone Schools, Centres and Communities (Revised Edition). Une version française de ce document est disponible sous le titre, *Trousse de ressources CSC: Le cadre d'action à l'intention des écoles, des centres et des communautés anglophones (révisé)*.

Working Document (2007.09.25)

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Acknowledgment

The Coordinating Committee wishes to acknowledge the input from the CLC coordinators, whose feedback was very helpful in producing this revised edition.

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Ministère de l'Éducation, du Loisir et du Sport
Community Learning Centers—Resource Kit

ISBN 978-2-550-60913-1 (print version)
[French edition: ISBN 978-2-550-59743-8]

Framework for Action (PDF)
ISBN 978-2-550-59746-9
[French edition: ISBN 978-2-550-59747-6]

Legal Deposit—Bibliothèque et Archives nationales du Québec, 2011
Legal Deposit—Library and Archives Canada, 2011

10-00334-A

■ MEETING THE CHALLENGE

The idea of *equal educational opportunity* is a longstanding theme of public policy around the world, reflecting the importance that people attach to education both for individuals and society. Initial schooling is no longer a sufficient preparation for an ever-changing world; *lifelong learning* is now required.

For this reason, schools and vocational and adult training centres in Québec have been the focus of ongoing reform that has shifted the emphasis previously placed on universal *access to schooling*, to *success from schooling* for both youth and adults.

During this same period, the Québec government has pursued a policy of *regionalization*, that is, increased decision making at the local and regional levels, with an emphasis on economic development. The current era of “globalization” has increased the importance of these initiatives, as both the public and private sectors struggle to learn how to *think globally* and *act locally*.

In an educational context, this policy reflects a more *ecological* view of school and community as an organic whole, rather than as totally separate entities. This in turn requires a more *holistic* approach to planning and managing educational and community change.

THE ENGLISH-SPEAKING MINORITY: This challenge is particularly acute for English educational institutions and communities, especially in those regions where Anglophones make up a very small percentage of the total population and the English school is the only English-language public sector institution in the community. These communities reflect a rich diversity of social, cultural and other characteristics but they share a common desire to strengthen the *vitality* of their communities through a tapestry of connections among individuals and groups.

It is for this reason that the Ministère de l'Éducation, du Loisir et du Sport du Québec (MELS) has supported the development of this *Community Learning Centre Framework for Action* in order to assist school/centre and community leaders who wish to meet this challenge.



The Framework in Brief

A new idea, no matter how promising, will not take hold of its own accord. It must be nurtured and given adequate support so that these changes can be successfully implemented and sustained over time. The purpose of this *Framework for Action* is to provide the first strand of this support. It is the centrepiece of a series of publications, available on-line on the LEARN CLC Web site (see **For More Information**, p. 27).

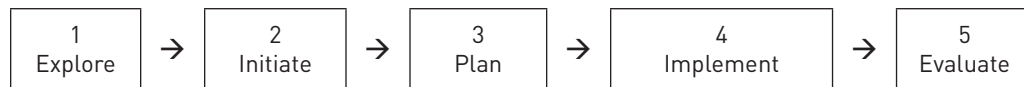
Relationships between schools/centres and the community include both short-term and longer-term interactions between individuals, families, groups or organizations. This Framework does not encompass all of these forms. It envisages an **ongoing** form of **collaboration** among various partners that come together to create an **organization** (see definitions provided in Step 1, page 1).

A theory of change

“offers a picture of important destinations and guides you on what to look for on the journey to ensure you are on the right pathway.”

This Framework was built on a **grounded theory of sustainable change**. Being grounded means that the theory is based on lessons learned from the “real world” experiences of people and organizations. The theory maps the “pathways of change” that experience has shown can lead to socially important results (see text box),¹ that are sustainable over time. It consists of **five major action steps** to be undertaken by a school/centre and community partners to create a CLC, in order to promote student success and community development.

If you are already involved in such an initiative, use the outline which follows to see where you need to start.



• **Key terms** used in this Framework are defined in boxes such as this and in a **Glossary** on p. 27.

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Guiding Principles

First, the framework is meant to be **comprehensive** and **practical**, dealing with relevant issues in a manner that people in the field will find helpful, without being unduly complex. Therefore, the Framework attempts to say everything that needs to be said in as short and straightforward a way as possible.

Second, schools/centres and other frontline service providers are under pressure to achieve a multitude of results. Accordingly, the Framework has been designed to **dovetail** with existing policies and programs.

Third, the Framework recognizes the fundamental importance of **reciprocity**; it must respond to the needs, aspirations and contexts of *all* partners. Although it was not possible to consider every potential partner, let alone deal with all their concerns, the Framework addresses all issues from this wider perspective.

Fourth, the Framework is **advisory, not prescriptive**. It is *open-ended*, setting forth the issues to be dealt with but leaving many details to be decided by you, the users.

Your Steps, Your Sequence, Your Timeline

You decide where to start, which steps to skip, the sequence of chosen steps and what you do in each step. If you are already involved in some form of school-community collaboration, Step 2 may be the place to start. You may wish to defer signing the partnership agreement until the planning stage has been completed. ***It's up to you.***

If you are starting at the beginning, then you can expect a timeline of approximately one year to complete the first three major steps (Explore, Initiate and Plan), before your CLC is "up and running" (Step 4). However, it may take more or less time depending on the complexity of the venture and whether some steps have already been accomplished (e.g. you have a process for evaluating school/centre success that can simply be adapted).

Whatever your situation, it would be useful to sketch out a provisional timeline to provide some sense of direction before actually proceeding beyond Step 1.

1 EXPLORE

• **Organization :**
entity composed of individuals, groups or other organizations, that act together to achieve shared goals within an identifiable structure defined by formal or informal rules

Step 1 presents the first in a series of “pathways of change,”¹ designed to foster student success and community development by means of a CLC. More specifically, the purpose of this step is to explore the possible creation of a CLC as an **organization** (defined below). As can be seen by the definition of a CLC that follows (p. 3), the CLC is a form of **ongoing collaboration**, not a “one-off” venture. Step 1 comprises three steps:

- See what CLCs look like in other communities.
- Create an image of a CLC for your community.
- Decide to proceed.

1.1 See What CLCs Look Like in Other Communities

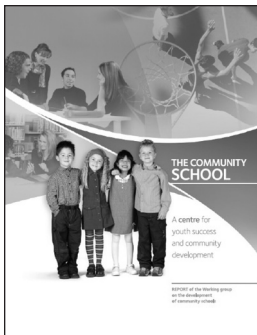
Community Schools—A Promising Response

Ideas such as *community education*, *community schools* and *educational community* have become increasingly popular in many jurisdictions because there is strong evidence that these notions offer a promising response to schools/centres and communities (see text box).² In Québec, for example, the *Supporting Montréal Schools* program actively promotes partnerships between schools and local communities, as does *New Approaches, New Solutions*.³

The CLC offers the potential to build the “**social capital**” of English-speaking communities through its collaborative partnership approach. These enhanced connections among individuals and groups “shape their access to important resources and to the social support that allows for the effective negotiation of the challenges they face.”⁴

The Diversity of Community Schools

As illustrated by a recent Québec report, *The Community School*,⁵ this expression is the most common name for a CLC. Although a CLC can take on a variety of forms, a common thread of values and beliefs runs across the range of these forms. Generally, they reflect an *ecological* view of school and community as an organic whole, rather than as totally separate entities. Like an **ecosystem** in nature, communities are complex, characterized by diversity rather than uniformity.



“No effort . . . has captured the essence of systemic reform more completely than the implementation of collaborative school-linked services.”

1. Organizational Research Services, 2004, p. 1.
2. Wang, Haertel & Walberg, 1998, p. 1.
3. See, e.g. Ministère de l'Éducation du Québec, 2000.
4. Pocock, 2006, p. 1.
5. See Working Group on the Development of Community Schools, 2005.

Pluralistic communities share common values but respect and celebrate the individual values of its members: “A community of people is a place . . . rife with activity, mutual respect, and the recognition that everyone in that place is responsible for and accountable to one another”⁶ Schools/centres play a key role in transmitting and shaping values. They provide a mirror of society, reflecting both what we are and what we would like to be.

Community schools are often called “**extended**” or “**full service**” schools to emphasize their extended offerings and hours of operation. One of the best sources of information on these schools is the Coalition for Community Schools, whose capsule definition is cited below.



Boiled down to the basics, a community school is both a set of partnerships and a place where services, supports and opportunities lead to improved student learning, stronger families and healthier communities. Using public schools as a hub, inventive, enduring relationships among educators, families, community volunteers, business, health and social service agencies, youth development organizations and others committed to children are changing the educational landscape—permanently—by transforming traditional schools into partnerships for excellence.⁷

The Children’s Aid Society describes a community school, as: “an integral part of the neighborhood, a focal point in the community to which children and their parents could turn for a vast range of supports and services.”⁸

Saskatchewan Learning has done considerable work developing a community school culture, which they call a caring and respectful school environment, a culture that is grounded in the community education movement,⁹ and is part of School^{PLUS},¹⁰ their system-wide reform of education vesting schools with a dual mission to:

- educate children and youth—through a responsive learning program that enhances student outcomes, and
- serve as centres for social, health, recreation, culture, justice and other services for children, youth and their families

The CLC as Defined by the Framework

The Framework defines a CLC as an equal partnership of schools/centres, public or private agencies and community groups, working in collaboration to develop, implement and evaluate activities to answer school and community needs that will enhance student success and the vitality of the English-speaking community of Québec. Using a grounded theory of sustainable change (see p. II), the Framework incorporates two complementary images of a CLC as a “learning community” and as a “hub” of community service.



6. Senge et al, 2000, p. 461.

7. Coalition for Community Schools, n.d., p. 2.

8. Children’s Aid Society, 2001, p. 8.

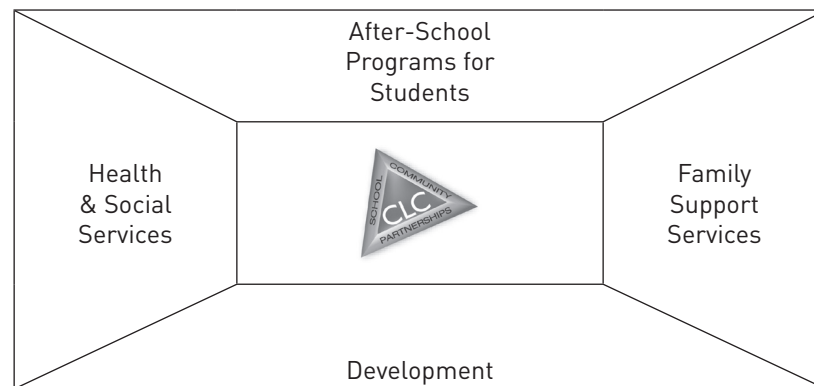
9. See Saskatchewan Learning, 2000.

10. See Saskatchewan Learning, 2002.

Learning community:
“a place . . . rife with activity, mutual respect, and the recognition that everyone in that place is responsible for and accountable to one another . . .”

A learning community is “a group of people who take an active, reflective, collaborative, learning-oriented, and growth-promoting approach toward the mysteries, problems, and perplexities of teaching and learning.¹¹ It thrives on individual and organizational learning by all members of the school community, continually reflecting not only about *how* things are done, but *why* (see text box above).¹²

The CLC as a **hub** places it at the centre of a network of services such as those shown here. The school/centre might provide the major locus of its activities or they might be delivered in various locations. In any case, the aim is to reduce, even eliminate, barriers between the school/centre and the community.



These images reflect the Framework’s core belief that a CLC can build the social capital of English-speaking communities in Québec, to the benefit of students, families and community members.

1.2 Create an Image of a CLC for Your Community

Building Trust

A successful partnership is built in stages, but the foundation of all these stages is trust. All partners must feel that they are valued, that their opinions matter and that will be treated with respect.

Testing the Waters

In order to determine if others share, or might come to share, an interest in creating a CLC, someone needs to take a leadership role to involve other **stakeholders** in a “conversation” about creating a CLC. Depending on where interest was initiated and the nature of the community, this expanding dialogue might begin with members of the school/centre governing board, a community group, or representatives of local agencies that you believe might have an interest in a CLC. This initial conversation must be grounded in some vision of the nature and purpose of a CLC, enabling stakeholders to answer two questions:

- **What is a CLC?**
- **Why would we want one?**

11. Mitchell & Sackney, 2000, p. 9.

12. Senge et al., 2000, p. 461.

One should assume that as the dialogue about the CLC evolves, this group of partners will change. Some may lose interest as the purpose of the CLC becomes clearer, while others not yet considered may need to be added.

Expectations and Benefits

Research on community schools in the United States found that in general, community schools provided four major benefits:

- improved student learning
- enhanced family engagement with students and schools
- more effective functioning of schools, and
- increased community vitality¹³

Visit the Harvard Family Research Project for research on the benefits of school-community collaboration.

No innovation such as a CLC will provide the same benefits in every community. However, a CLC can meet a wide range of expectations in different contexts, as suggested below.

Expectations

Generally, a CLC can be expected to:

- provide access to the conditions deemed necessary for student success
- respond to the particular culture and needs of the communities it serves
- provide services that are accessible to the broader community
- deliver a range of services that are self-supporting and sustainable over time
- integrate existing services and resources with those available from external agencies
- develop financial/resource partnerships that ensure long-term sustainability
- resonate within its community as a successful response to its needs
- demonstrate flexible and innovative approaches to service delivery

Defining Your Community

Traditionally, the term “community” meant a relatively homogeneous social group such as a neighbourhood: like-minded citizens of similar socioeconomic status whose parents resided there before them and whose children will do so afterward. Some traditional neighbourhood schools still exist but they have become the exception, rather than the rule.

Many English schools and centres have another dimension of community to consider: they serve one population—the “Anglophone community”—but are part of a wider community not defined by language. It would therefore be useful for a school/centre considering the desirability of a CLC to pause at this stage and ask: **How do we define our community?** The answers to this and other questions will enable you to form a working definition of your community. However, this definition is likely to change as you talk to community members about a CLC.

13. Blank, Melaville & Shah, 2003.

Your Vision of a CLC

The *vision* of an organization provides an image of its long-term goal, that is, how the world will be a better place because of the results it achieves. For example, the vision of a local school may consist in being *a place where students, staff, families and community members work together, a school community environment that is stimulating, healthy and safe, a community that is economically and socially viable, providing a future for its young people*. The vision underpins the mission of the CLC and provides the answer to the questions:

- **Why are we doing this?**
- **Why does it matter?**

1.3 Decide to Proceed

One final question remains:

- **Are the partners and their organizations ready to embark on this joint venture?**

The readiness of the emerging partnership to proceed depends on several factors, including the leadership and motivation of each partner.

At this point, you should have the information needed to make a decision to proceed. However, it is possible that further reflection or confirmation of certain conditions may be required. Alternatively, it is possible that you have decided that a CLC is feasible, just not the one that you originally envisaged, causing you to return to the drawing board to come up with a more viable prospectus. (You might also decide that some ***other form of collaboration*** between school and community is preferable.)

While it is unlikely that any group beginning a joint venture will have all conditions in place before beginning, it would be wise at this point to ensure that *sufficient* conditions are in place to warrant moving forward. Being *too cautious* creates a risk of losing momentum, but moving *too quickly* may cause the process to unravel, making it difficult to convince people to start again.

It is also appropriate to begin thinking about ***how students can be actively involved*** in the development of the CLC. There is ample evidence from both research and practice that students of all ages can make a real, not merely a symbolic, contribution to the development of innovations in school (see text box)¹⁴.

“Students, even little ones, are people too. Unless they have some meaningful (to them) role in the enterprise, most educational change, indeed most education, will fail.”

14. Fullan, 2001, p. 151.

2 INITIATE

The purpose of this step is to initiate the partnership. Step 2 comprises four steps:

- Map your needs and assets.
- Develop mission statement.
- Allocate responsibilities and resources.
- Conclude Partnership Agreement.

This is a key transition point where **commitment replaces contemplation**, but the actual actions taken will depend on the scope of the CLC being undertaken.

2.1 Map Your Needs and Assets

In addition to understanding the broad contours of the contextual landscape, it is important to situate the proposed CLC in terms of the needs and assets of the community. There is little point in creating a CLC if it does not respond to **real needs** or merely duplicates existing resources. Community assets come in a variety of forms, including tangible resources (e.g. a gymnasium), human resources (e.g. volunteers), and intangible resources, such as community spirit. **Asset mapping** can be used to create a “map” of these assets. Such a map is meant to be:

- *realistic* –by starting with what you have
- *positive* – through a discovery of community assets, and
- *inclusive* – recognizing a range of public, community and private assets¹⁵

EXAMPLE: SOME ADULTS MIGHT POSSESS A RANGE OF SKILLS IN TECHNICAL DRAWING, BUT NOT THE UP-TO-DATE SKILLS REQUIRED TO USE COMPUTER-ASSISTED DESIGN PROGRAMS. THE NEED IS THE GAP BETWEEN THEIR CURRENT SKILL SET AND THAT REQUIRED FOR EMPLOYMENT IN THIS FIELD.

2.2 Develop Mission Statement

The mission should inspire and motivate participants and other stakeholders, providing the basis for **organizational transformation** (see text box).¹⁶ It provides the foundation of the partnership, articulating its:

- values and purpose
- desired results
- guiding principles

Setting directions that have “considerable value or moral weight” is an “absolutely key task” for transformational leaders.

Values and Purpose

Values ought to serve as “beacons” to guide public policy and practice in accordance with the values of society. Not every community has the same “mix” of values. A CLC should reflect on the values of its community as it develops its vision and mission.

15. Fuller, Guy & Pietsch, 2002, p. 4.

16. Leithwood, Jantzi, & Steinbach, 1999, p. 70.



One of the goals of the SUN initiative is based on an image of schools as a “a safe, supervised and positive environment for expanded experiences that improve student achievement, attendance, behavior and other skills for healthy development and academic success.”

The vision provides an *image* of its goals, as shown by the example in the text box from SUN, the Schools for Uniting Neighborhoods initiative.¹⁷ A mission statement can be nothing more than a slogan but research shows that successful organizations are actually guided by their mission statement, ensuring that its core values and beliefs are firmly in place and are not compromised or blurred over time.

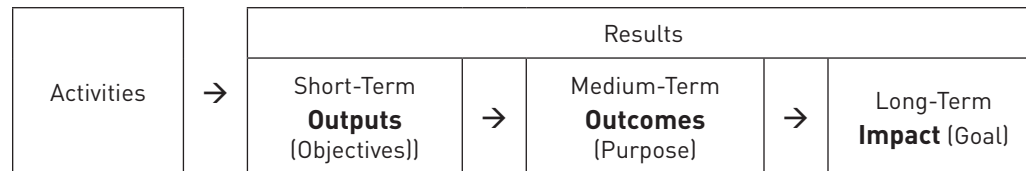
A school’s mission statement is contained in its educational project (or a centre’s statement of goals); likewise, another agency or a community group will likely come to the table with its mission statement. A key challenge facing the fledging CLC in drafting its mission statement is first to understand where each partner, individually, is coming from and second, where, together, they want to go and the results they want to achieve.

Desired Results

This Framework uses a **results-based management** approach to the development and operation of a CLC. This approach operates from the assumption that various actions (usually called activities) can produce results, as defined below.

- **Result:** a describable or measurable change that occurs because of some action supported by various resources.

Results-based management focuses our attention on the changes we want to see happen in the lives of children, families and communities. However, some changes are dependent on others, a sequence of change that is called a **results chain**.



As shown here, these successive levels of results relate to the short-, medium- and long-term reasons for the activity, usually expressed as its objectives, purpose and goal. These reasons answer the question: **Why** are we undertaking this activity? The expected results in each level answer the question: **What will happen** because of this activity from the short to the long term?

Keeping a spotlight on results does not mean that we ignore how the organization operates, as reflected in the definition of organizational performance adopted by this Framework:

- **Organizational performance:** the extent to which an organization or a system **operates** and **achieves results** in accordance with the expectations of stakeholders.

17. Hamann, 2003, pp. 7-8.

This definition is based on a belief that both what we do and what we achieve matter. Results-based management therefore focuses on the planning of activities *in relation* to intended results.

Since a mission statement is not something that an organization should be continually revising, it is preferable to limit this exercise to determining “results areas”—a general statement of the type of results foreseen at each level, rather than making a list of specific results. This task is better left for Step 3 (Planning, p. 15).

Guiding Principles

Guiding principles tell stakeholders and the public what the CLC stands for and where it is going. Policy and practice regarding community schools suggest that these guiding principles relate to three general areas: purpose; leadership for building community and managing for results.

- Guiding principles related to **purpose** help remind us why we are pursuing a particular course of action. They serve to keep decision making linked to the “bigger picture.”
- **Leadership** is critical in building any organization. Guiding principles in this area state what is expected of the leadership of the CLC.
- Leaders must not only inspire change, they must manage it. Guiding principles in this area state what **managing for results** requires in terms of planning and coordinating service delivery, and evaluating the results.

Guiding principles provide reference points for action, but they should not be cast in stone. Like a mission statement, guiding principles provide both a direction and a set of values, especially when the going gets tough. Guiding principles are easy to follow on good days but much harder to live with on bad days. Given that the CLC is a long-term venture, guiding principles should help sustain it through both good and bad times.

Review Partner Mission Statements

The CLC will almost certainly affect the educational project of the school, or the equivalent mission statement of a centre, community group or agency involved in the CLC. In the case of a minor CLC initiative, each partner should expect to revise its educational project/mission statement to accommodate this new initiative. By contrast, in the case of a major CLC initiative, the school/centre, and possibly other partners, should expect to merge both into one integrated document.

2.3 Allocate Responsibilities and Resources

Having set the course, the purpose of this step is to decide on how the CLC and the partnership should be **structured**, as well as how the roles and responsibilities assigned and resources allocated.

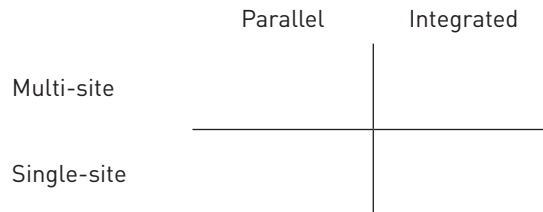
Because the scope and complexity of the CLC can vary widely, this section can only present a general overview of the range of roles and responsibilities to be considered. However, in all cases, the key by-words are:

- **Reciprocity** – a CLC is not a one-way street, with purpose and benefits defined by and on behalf of only one partner, be it the school/centre or any other organization or group.
- **Equal Voice** – even if the partnership comprises large and small organizations, or has one partner that contributes the lion’s share of the resources, all partners should have an equal say at the table.
- **Collaboration** – successfully pursuing common goals through a new organizational structure requires more than a formal relationship; it requires a collaborative culture.
- **Flexibility** – not only does “one size” not fit all CLCs, one size will not fit any CLC all the time; one must always be prepared to adapt as changing circumstances require.

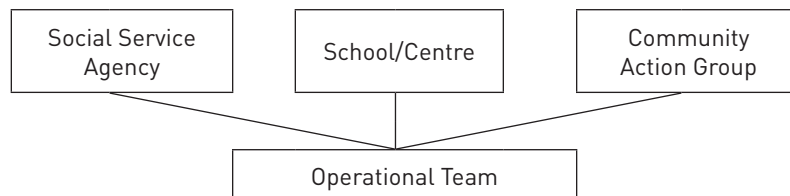
Reciprocity	Equal Voice
Collaboration	Flexibility

Structuring the CLC and the Partnership

The structures of school-community ventures vary from parallel models, where old and new structures co-exist, each with its own mandate, to integrated models, where the old is replaced by a new hybrid structure. They may also vary in terms of the level of the partnership from single-school to multisite initiatives. The combination of these two dimensions is shown below.



This Framework assumes a streamlined approach that does not include any formal structure for the partners. All work is delegated by them to an **operational team**, for example:



The Operational Team

The “operational team” (or whatever you decide to call it) will consist of a team leader, representatives of the partners and key stakeholder groups, as well as any **critical friends** or other resource persons. Moreover: “Because students will be most dramatically affected by changes, they should be afforded ways to contribute to the community school effort.” (see text box).¹⁸

There are many ways to make up an operational team; however, based on the experience of other jurisdictions, one appointment is crucial, namely:

- a **coordinator/facilitator** who fulfills a leadership role and provides technical assistance

Depending on the scope of the CLC, this appointment may be full- or part-time or may be exercised by more than one person. For example, a generalist from within the school/centre could act as the team leader, with an outside resource person providing technical assistance.

Allocation of Resources

All activities foreseen for the CLC will require resources—financial, human and material. Although the first will typically be used to purchase the latter types, some of these nonfinancial resources may come as contributions “in kind” from one or more partners.

At this stage, it is important to determine the broad parameters of the resources that each partner is—or might be—willing to contribute and any conditions that are likely to be attached to their allocation. For example, a funding agency might make its contribution contingent on being matched by another agency or upon the approval of the Action Plan (Step 3).

It is equally important to consider resources with a view to the long term, especially if the CLC has received “start-up” funding that eventually must be replaced. In other words:

- Does the CLC have, or can it acquire the necessary resources to be sustainable over time?

2.4 Conclude Partnership Agreement

This step marks the end of the initiation process when you decide if you are ready to proceed. A joint venture such as a CLC needs to be “formalized” so that the partners and other concerned stakeholders have a clear understanding of what has been agreed. Generally, this will be done in a written document that could take several forms, including a:

- contract
- protocol
- memorandum of understanding

In a formal written agreement, it is inappropriate to include details that are subject to change. Thus, for example, rather than include a detailed budget as part of the agreement, it is preferable to specify the financial and other resources to be provided by each

“By including children and youth . . . you will help ensure that your school reflects the needs of its young people, and you will give older students genuine opportunities to develop leadership skills and a sense of responsibility for their community.”

All systems are go!

- ✓ Partners are fully committed.
- ✓ CLC mission is clearly defined.
- ✓ CLC structure and roles are determined.
- ✓ Resources are allocated.
- ✓ Enabling conditions are in place.

18. Children’s Aid Society, 2001, p. 85.

partner during the life of the agreement, as well as the terms and conditions for the approval and revision of annual budgets.

The length and amount of detail of a partnership agreement will vary with the nature and complexity of the CLC, but any agreement should contain the following:

Some joint ventures may be better served by less formal arrangements; that is something you will decide locally.

- an identification of the partners
- a mission statement
- responsibilities of partners and the “operational team”
- allocation of resources
- any other relevant provisions (e.g. duration)

The conclusion of the Partnership Agreement will typically involve the following tasks:

- drafting each section of the agreement
- reviewing all provisions in a consolidated draft
- referring tentative agreement to partners for approval
- signing the agreement



In such a case, signature may be deferred until the end of Step 3.

NOTE. In the first year of a CLC, some partners may not be willing to sign the agreement until the action plan has been approved.

3 DEVELOP AN ACTION PLAN

The purpose of this step is to complete the Action Plan for the operation of the CLC. Step 3 it comprises five steps:

- Determine desired results.
- Determine programs and services to be offered.
- Determine capacity to deliver services.
- Determine means to evaluate actions and results.
- Complete Action Plan.

The Action Plan maps the “*pathways to change*” envisaged by the Framework and, more specifically, by the Partnership Agreement. Planning is a balancing act: too much planning may lead to “gridlock,” but too little planning may lead to chaos. A CLC’s Action Plan can also be seen as a key means of *managing risk*.

- **Risk:** uncertainty about the achievement of the intended result or what that result (or the attempt to achieve it) may cause.

Risks may be visible, with immediate effect, but they may be hidden, threatening the long-term sustainability of the venture.



3.1 Determine Desired Results

The first planning task is to determine the results which the CLC wishes to achieve or to which it intends to contribute, based on the various results areas decided by the partnership in Step 2.2 (p. 9).

Making the Vision Concrete

Images of the **impact** of program work can seem quite vague, for example:

- more prosperous economy

These images usually become clearer with **outcomes** and more concrete with the **outputs**; for example:

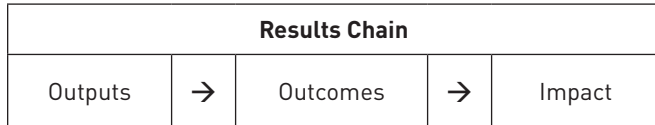
- graduates are employed in their chosen field (outcome)
- students in a vocational centre graduate (output)

In a joint venture, determining results means seeking points of **convergence** between the results sought by the various partners. This leads to establishing a mutually beneficial results chain.

Planning alone will not guarantee success, but the lack of appropriate planning will likely guarantee failure.

Establishing the Results Chain

Results-based planning begins at the end of this chain by specifying the long-term results that we wish to see occur. Then, the technique of **back mapping** is used to determine the medium-term and subsequently the short-term results that must first occur to achieve them. (The next link in the results chain—the activities that will produce these short-term results—is dealt with in Step 3.2.)



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As a joint venture of two or more organizations, the CLC seeks to achieve results that are desired by the partners. **For example:**

- A community group wishes to see young women who are either pregnant or single mothers adopt a healthy lifestyle and become more effective caregivers (short-term result).
- If successful, this will lead to healthier children, who are then more successful in school (medium-term result).
- The school is equally supportive of pursuing this result and so they create a CLC that offers, among other services, a support program for young women who are either pregnant or single mothers.

Even if you cannot determine the precise steps to be taken on the path to longer-term results, you should be able to map out broad strategies to achieve them and the approximate time frame for each. Determining short-term results is a much more concrete and immediate exercise, as the results are to be achieved not in some future time but, for example, by the end of the school year.

3.2 Determine Programs and Services to Be Offered

Choosing services to be offered requires a blend of creativity and practicality. Most of all, it requires a clear **focus** on feasible but effective means to achieve desired results.

Continuing the back mapping begun in the previous step, one looks for services that will produce desired results, thereby passing from *Why and to what end?* to **How and by what means?** The challenge for the CLC is to be *guided*, but not *blinded*, by its vision: “Programs and projects need to be grounded in reality, not in the organizations’ *ideal* vision of how things *should* work.”¹⁹

No service can be determined without a consideration of the organization’s capacity to deliver the service in question. These capacities (dealt with in Step 3.3) include a range of human and material resources. Except for volunteers and other donated services, all these resources cost money. Therefore, determining which service to offer must include an analysis of costs, a key factor in deciding among alternative modes of delivering the same service and in choosing one service over another.

Given the wide range of community school initiatives across an equally wide range of contexts, a CLC can find inspiration in many existing services and programs. Making appropriate choices is critical as most organizations cannot afford to invest scarce resources if they do not support the results being sought.

19. Delpeche et al., 2003, p. 14, emphasis added.

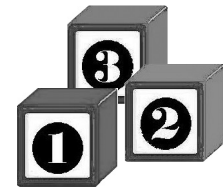
Once the program of activities has been decided, provision must be made for “monitoring” them.

- **Monitoring:** an ongoing process to ensure that planned activities or processes (including resources) are “on track” and that progress is being made toward intended results.

In this Framework, monitoring (which also applies to Step 3.3) is distinguished from “evaluation,” a systematic inquiry about the CLC’s performance (see Step 3.4). In monitoring performance, you are *keeping an eye* on the *warning lights* and other *key system gauges* to ensure that the system is performing satisfactorily.

3.3 Determine Capacity to Deliver Services

The performance of any CLC will ultimately be judged on the basis of how well it delivers services and achieves intended results. However, organizations, like people, cannot perform unless they have *capacity*, that is, “what it takes” to do well. Capacity provides the “*building blocks*” of performance, while capacity building determines which blocks are important, how they should fit together and then assembles them.



- **Organizational capacity:** the resources, systems and other capabilities of an organization that enable it to attain and sustain high levels of performance in accordance with the expectations of its stakeholders.
- **Organizational capacity development:** a continuing process by which an organization increases its capabilities to perform.

The lack of capacity is the most important reason why innovations fail and, more particularly, why they are not sustained.²⁰ Capacity is of obvious importance to a CLC, as the reason for its creation is to share the capacity of its partners so that together they can produce results that none of its partners could achieve singly.

Capacity development and the enhanced capacity it creates can be viewed as the last links in the results chain. In this step, one back maps from the services that will produce desired results to the capacities required to deliver these services and, if necessary, to the actions required to build these capacities.

A CLC inherits some of the capacities of its partner organizations but it may not have all the capacities it needs, especially as a new organization. An important planning task, therefore, is to determine which building blocks are required and how they should be assembled to best meet its needs in its context.

20. Fullan, 2001, p. 18.

Building blocks come in all sorts of tangible shapes (e.g. facilities and equipment) and intangible forms (e.g. interpersonal relations and organizational culture). Capacity building is not something that can be completed as a start-up activity but is a long-term endeavour. However, paying attention to capacity building from the start is perhaps the most important thing a new CLC can do to ensure its sustainability over time.

3.4 Determine Means to Evaluate Actions and Results

“Evaluation” is another term with multiple meanings. In this Framework, it is defined as follows:

- **Evaluation:** a systematic inquiry about the performance of an organization (e.g. CLC) for the dual purpose of accountability and improvement.

“Youth participation in evaluation is a process of involving young people in assessing community programs that affect their lives. It is not ‘token’ involvement, but active engagement where youth have real influence in decisions.”

This Framework has been designed to support “**self-evaluation**,”²¹ an approach in which the organization takes primary responsibility for evaluating its own *performance*, as defined previously in Step 2.2. This approach is consistent with both Québec’s public service management framework and the school-centred reform of education.

Self-evaluation is a **participatory process** involving all major stakeholders (see text box).²² Like the overall process described by this Framework, it begins with planning, the focus of this step (3.4), then proceeds to the actual conduct of the evaluation (Step 5), which ends with “feedback loops” that set the stage for the next cycle of planning and service delivery. Like any so-called *linear* process, it is not as straightforward in practice as it appears on paper, with a good deal of “back and forth” movement along the way.

Setting the Direction

Mindful of keeping the evaluation manageable, this Framework limits the scope of site-level evaluation by a CLC to **key areas of performance** addressed cyclically (e.g. annually). This limitation does not ignore the importance of more in-depth or specialized evaluations, it merely assumes that they will be a shared responsibility of the CLC, its partners, local and regional agencies or relevant government ministries, according to the nature and purpose of these evaluations.

Once the course of the evaluation has been set, the usual tasks of project/program management come into play, namely organizing the flow of work and allocating resources. Sketching out a preliminary time line may be the first “reality check” of the exercise as the evaluation team compares the scope of the evaluation as originally envisaged and the *actual* amount of time available.

If the evaluation is to have credibility, the plan should outline the ethical and other standards it will respect. Any evaluation needs to be **trustworthy**; if stakeholders do not have faith that it paints a complete and accurate picture of whatever is being evaluated, they will ignore its findings. If this happens, all the investment of time and energy may be for nothing.

21. See Smith, 2004.

22. Horsch, et al., 2002, p. 1

Deciding What Will Be Evaluated

Organizational performance is concerned with the entire spectrum of the results chain discussed earlier, from:

- building organizational capacity to provide services, to
- delivering the services to students and the community, and
- achieving intended results (short, medium and long term)

In order to focus the evaluation on the most important aspects of its performance, the CLC must decide precisely which aspects will be evaluated. This decision defines the **objects** of the evaluation, that is, *what* performance will be evaluated, but not *how good* that performance should be. The latter requires some expression of performance “standards.” Once again, a confusion of terms abounds; in this Framework, we use the three terms defined below.

- **Performance standards:** specify the level(s) or degree(s) of desired performance, often using various *evaluation criteria* that enable us to observe and measure performance.
- **Performance targets:** specify the expected level of performance, often in a given space of time, with respect to some object of evaluation.
- **Benchmark:** a comparative reference point for setting *performance standards* and *targets*.

Once a CLC has decided what is to be evaluated, it must then ask itself: **How** do we measure performance in relation to each object?

Measuring Performance

Because organizational performance is neither simple nor straightforward, the evaluation is usually done by means of performance indicators as defined below:

- **Indicator:** a *pointer* that provides a *proxy measure* or a symbolic representation of organizational performance.

Indicators tend to be viewed as specialized statistics that *quantify* performance; however, *qualitative* indicators (e.g. visual and narrative expressions) can be useful when quantitative measures are not feasible or when a more *symbolic* representation of quality is desired.

The production of indicators requires **sources** of appropriate data and the **means** to collect and analyze them, which often involves the creation of “instruments” such as questionnaires and rating scales. This exercise provides another reality check as the feasibility of using any given indicator depends on having the capacity to produce it.

Producing indicators can become quite technical; however, the most important point remains that the indicators must measure what matters to the CLC.²³

23. Stoll & Fink, 1996, pp. 166-167.

AN EXAMPLE OF PERFORMANCE MEASUREMENT

- A desired result, that graduates obtain work in their chosen field within two years, becomes an **object** of the evaluation.
- A survey reveals two **benchmarks**: the average for all centres in Québec is 80% (employment in chosen field within two years) and the rate of the top ten centres is 90-95%.
- Aspiring to be a top centre, the **standard** of 90% is set.
- However, given its past performance (50-60%), successive **targets** of 70%, 80% and 90% are set for a three-year period.
- The chosen **indicator** is the percentage of graduates who report finding such employment.
- The **sources/methods of data collection**: a questionnaire mailed to graduates two years after graduation; of **analysis**: quantitative data will be analyzed using a spreadsheet, while qualitative data will be analyzed separately.

The Action Plan

- Intended Results
- Activities
- Monitoring
- Evaluation
- Work Plan
- Resources



Sign Partnership Agreement, if the actual signing of the partnership agreement (Step 2.5) was deferred until the action plan was completed.

3.5 Complete Action Plan

This final step is first used to consolidate and review all aspects of the Action Plan completed in steps 3.1 to 3.4, while taking into account each partner's annual planning.

Review Partner Planning

The Action Plan will almost certainly affect the school/centre's success plan and the equivalent plans of each community group or agency involved in the CLC. The impact of the Action Plan on the success plan or its equivalent should be determined before it is presented to the partners for approval.

Once the plan has been reviewed, it needs to be approved in accordance with any relevant parameters of the Partnership Agreement.

4 IMPLEMENT ACTION PLAN

The purpose of this step is to implement the Action Plan developed in the previous step. Step 4 comprises three steps:

- Allocate resources and begin service delivery.
- Allocate resources and conduct capacity building.
- Monitor service delivery and capacity building.

In this step, you will enter the first link of the results chain, by undertaking the activities that have been designed to produce the short-term results set for the CLC.

This is the second key transition point in the process, where **action replaces planning**.

4.1 Allocate Resources and Begin Service Delivery

This step is, in theory, quite straightforward: simply do what the Action Plan says should be done, for example, hire or reassign the staff and allocate the resources provided for each program and other service foreseen in the plan. However, in practice, this step may prove to be more difficult and some “re-tooling” of the Action Plan may be required.

4.2 Allocate Resources and Conduct Capacity Building

As noted earlier (p. 18), service delivery requires capacity and it is possible that some capacity-building activities may need to occur before some aspects of service delivery are undertaken. Others may take place at the same time or at a later date as circumstances warrant. The key point is that capacity development should not be neglected and put off until that mythical future state, when there will be time for such things.

4.3 Monitor Service Delivery and Capacity Building

Once again, this step puts into practice the plan adopted for keeping both service delivery and capacity building on track in terms of progress toward results, conduct of activities and allocation of resources.

5 EVALUATE

Conducting the evaluation of the CLC's performance flows from the evaluation plan developed in Step 3.4.

The purpose of this step is to conduct the evaluation of the service delivery and capacity building carried out in the previous step. Step 5 comprises three steps:

- Collect the data.
- Analyze the data.
- Report to stakeholders.

This step completes the programmatic cycle and sets the stage for the next one to begin.

5.1 Collect the Data

Data are simply *bits* of information used to produce the indicators described earlier (p. 20). There are two major types of data:

- **quantitative data**, that are numerical in nature, that is, information bits that can be counted
- **qualitative data**, that are verbal or visual in nature, that is, information bits that cannot be counted

There are a wide variety of methods for collecting data, including:

- interactions with people
- observation of settings or activities
- archival gathering of data

The data collection process is largely predetermined by the methods chosen to produce the indicators in Step 3.4.

5.2 Analyze the Data

The principal task at this stage is to assemble the bits and pieces collected in the previous step and make sense of them.

The processing of quantitative data consists of three major tasks:

- entering the data in a computerized data file
- performing various statistical operations on the data
- tabulating the results.

The analysis of qualitative data requires a very different process, however, they provide a richness not found in quantitative data.²⁴

Once all the data are in and analyzed, the evaluation team will be in a position to develop conclusions. It is at this point that the team needs to ensure that its findings accurately reflect the data collected and analyzed and that its conclusions are firmly grounded in these findings

24. See Patton, 2002.

5.3 Report to Stakeholders

Just as CLCs vary in terms of purpose, scope, and so forth, evaluation reports vary widely from informal short reports to longer and more formal ones. There is no single format nor one generic outline that will work for all CLC evaluation reports. However, in this day and age of *multimedia*, conventional *paper reporting* is hardly sufficient; reporting will also include Web sites and other electronic media, as well as face-to-face communication.

As a learning community, a CLC needs to continually reflect on its experience. Like a reflective practitioner, organizations need to step outside the flow of everyday work in order to gather information about what has taken place, interpret that information in light of the organization's goals and context and generate **lessons learned** on the basis of this reflection. These lessons learned form an important part of the report and provide the basis for what the organization needs to do in future action plans.

If a CLC does not make real use of evaluation findings, it is extremely unlikely that the improvement purpose will be served. Accordingly, the outcomes of the evaluation include follow-up actions for future improvement. In addition to multiple uses of data by stakeholders, these actions become part of the feedback loops for the next planning cycle, that is, the application of lessons learned from reflections on past experience to future policy and practice.

Reporting and the Partners

In the same way that planning the evaluation must relate to each partner's plan for evaluating its own performance, reporting on the evaluation of the CLC must either take this other reporting process into account or merge with it, depending on decisions made in the planning stage.

A Final Word

The evaluation report is the public proof that schools can "speak for themselves," as illustrated by this image from a report commissioned by the National Union of Teachers in the UK²⁵ This image also reflects the important role that students can and should play, not only in evaluation, but in the development of any major policy initiative.

The report also marks a pivotal point between one planning cycle and the next. At the beginning of this cycle we asked: What is a CLC and why would we want one? Hopefully, at this point you will have a positive response to this question while asking another one: **Yes, but can we sustain it in the future?**



SCHOOLS SPEAK FOR THEMSELVES

25. See MacBeath, Boyd, Rand & Bell, 1996.

Sustainability is a key element in the theory of change underlying this Framework. That is why capacity-building is given so much prominence in this Framework, including the evaluation of capacity-building activities. The “buzz” created by an innovation, especially if external support is provided, can lead to initial success, but only organizational capacity can sustain it over the long term. The evaluation report provides the basis for developing various capacities and ensuring that the vision that inspired the partners to create the CLC in the first place can be sustained over time.

FOR MORE INFORMATION

This document is one of several publications in a series entitled available on the LEARN CLC Web site, including the following:

- ***A Promising Direction for English Education in Québec*** and ***So You Want to Create a Community Learning Centre: An Overview of the CLC Framework for Action*** provide an introduction to CLCs for a general audience.
- ***The CLC Resource Kit*** (which includes the ***Framework***, a ***Guidebook***, ***Templates*** and a ***Workbook***) provides detailed suggestions for implementing the Framework for the person responsible for coordinating this process.

More information on community schools in general, as well as this Framework in particular, can be obtained from a variety of sources, starting with the publications contained in the Reference List. Many of these publications can be obtained free from the Web site included in the reference.

GLOSSARY OF KEY TERMS

<ul style="list-style-type: none"> • Benchmark: a comparative reference point for setting performance standards and targets.
<ul style="list-style-type: none"> • CLC, or community learning centre: an equal partnership of schools/centres, public or private agencies and community groups, working in collaboration to develop, implement and evaluate activities to answer school and community needs that will enhance student success and the vitality of the English-speaking community of Québec
<ul style="list-style-type: none"> • Evaluation: a systematic inquiry about the performance of an organization (e.g. CLC) for the dual purpose of accountability and improvement.
<ul style="list-style-type: none"> • Indicator: a pointer that provides a proxy measure or a symbolic representation of organizational performance.
<ul style="list-style-type: none"> • Monitoring: an ongoing process to ensure that planned activities or processes (including resources) are “on track” and that progress is being made toward intended results.
<ul style="list-style-type: none"> • Organization: an entity composed of individuals, groups or other organizations, that act together toward some shared goals within an identifiable structure defined by formal and informal rules.
<ul style="list-style-type: none"> • Organizational capacity: the resources, systems and other capabilities of an organization that enable it to attain and sustain high levels of performance in accordance with the expectations of its stakeholders.
<ul style="list-style-type: none"> • Organizational capacity development: a continuing process by which an organization increases its capabilities to perform.
<ul style="list-style-type: none"> • Organizational performance: the extent to which an organization or a system operates and achieves results in accordance with the expectations of stakeholders.
<ul style="list-style-type: none"> • Performance standards: specify the level(s) or degree(s) of desired performance, often using various evaluation criteria that enable us to observe and measure performance.
<ul style="list-style-type: none"> • Performance targets: specify the expected level of performance, often in a given space of time, with respect to some object of evaluation.
<ul style="list-style-type: none"> • Result: a describable or measurable change that occurs because of some action supported by various resources: <ul style="list-style-type: none"> • outputs: short-term results (objectives) • outcomes: medium-term results (purpose) • impact : long-term results (goal)
<ul style="list-style-type: none"> • Results chain: the sequence of change from program resources and activities to outputs, outcomes and impact.
<ul style="list-style-type: none"> • Risk: uncertainty about the achievement of the intended result or what that result (or the attempt to achieve it) may cause.

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