



Resource Kit:

**THE COMMUNITY LEARNING CENTRE**

# Workbook

for Individualized Planning (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: Workbook for Individualized Planning (Revised Edition)*

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Lists the same steps and sub-steps found in the Framework, plus all the TEMPLATES used in each step.

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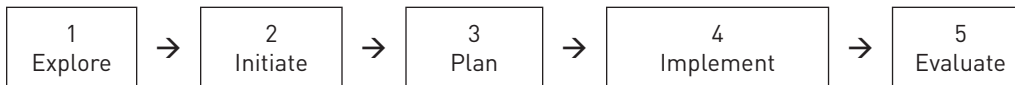
## ■ USING THIS WORKBOOK


In light of the importance of school-community collaboration, the Ministère de l'Éducation, du Loisir et du Sport du Québec (MELS) has supported the development of the **CLC Framework for Action**. It outlines a series of steps that schools, vocational and adult training centres and community groups can use to create a CLC.



MELS then mandated LEARN to revise and publish the Framework, and to create other related materials. All LEARN publications supporting CLCs are available on the CLC Web site under the general series title, **The CLC Resource Kit**.

In order to assist schools, centres and community groups to implement the Framework, LEARN produced the **Guidebook for Implementing a Collaborative School-Community Partnership** to provide *practical* and *user-friendly* suggestions as to how to achieve the purpose of and undertake the actions foreseen for each step.

Then LEARN produced a series of **Templates**, which are contained in this **Workbook for Individualized Planning**. Like the Guidebook, it has been written for those assuming a leadership role in coordinating each of the **Five Steps** in the Framework.



This **Workbook** contains a facsimile of these **templates** that you can use to construct 'instruments' for collecting data, measuring performance, etc., as well as 'forms' for recording information (e.g. a work plan). It is provided in a **Word** version (); so that you can create your own instruments and forms adopting or adapting the templates as you see fit. Each main section of the Workbook corresponds to one of the five steps shown above.

Instructions for using the templates are found in **Templates for Collaborative Action Planning** (Revised Ed.), published in a **PDF** version () , signalled by a cross-reference () in the right margin, as shown here. These instructions include credits for any source materials used to develop templates contained in this Workbook, with full bibliographic details provided in the Reference List.



### The Framework for Action



 **Templates**, p. #

## Templates and Templates

The following provides a list of templates and templates found in the Workbook for each step of the Framework.

<b>TEMPLATES AND TEMPLATES</b>	
<b>1 EXPLORE</b>	
1.1	Your Synthesis of Community Schools
1.2	Community Boundaries A Vision of Your CLC
1.3	Your Readiness Quotient (RQ)
<b>2 INITIATE</b>	
2.1	A Map of Community Needs and Assets
2.2	Partner Mission Statements Results Areas Guiding Principles Harmonizing Mission Statements Draft Mission Statement
2.3	Structuring Your CLC Assigning Roles and Responsibilities Allocating Resources
2.4	The Partnership Agreement
<b>3 PLAN</b>	
3.1	Points of Convergence Statement of Intended Results
3.2	Analyzing Proposed Services Service Activities Service Activities Work Plan Monitoring Service Delivery
3.3	Analyzing Capacity-Development Needs Capacity-Building Activities Capacity-Building Activities Work Plan Monitoring Capacity Building
3.4	Statement of Ethics Evaluation Boundaries Evaluation Work Plan Evaluation Grid
3.5	Harmonizing Strategic Planning The Action Plan

<b>TEMPLATES AND TEMPLATES</b>	
<b>4 IMPLEMENT</b>	
4.1	NA
4.2	NA
4.3	NA
<b>5 EVALUATE</b>	
5.1	Creating a Sample Sample Consent Forms Sample Instruments
5.2	Quantitative Data Analysis Qualitative Data Analysis
5.3	Evaluation Check List Auditing the Evaluation Reporting to Stakeholders

## A Check List of Operational Challenges



This template can be used as both a memory aid to remind you of the various steps involved in the process as you proceed through the Guidebook, and as a checklist, so you can check off (✓) each challenge after it has been addressed.

✓	<b>ACTION STEPS AND OPERATIONAL CHALLENGES</b>
<b>1 EXPLORE</b>	
1.1	See What CLCs Look Like in Other Communities <ul style="list-style-type: none"> <li>➤ Gather useful information about community schools</li> <li>➤ Construct your knowledge about community schools</li> </ul>
1.2	Create an image of a CLC for your community <ul style="list-style-type: none"> <li>➤ Construct an initial map of the community</li> <li>➤ Determine the implications of a CLC for your community</li> </ul>
1.3	Decide to Proceed <ul style="list-style-type: none"> <li>➤ Determine if the partners and their organizations are ready to embark on this joint venture</li> <li>➤ Produce the anticipated output for: Decision to proceed</li> </ul>
<b>2 INITIATE</b>	
2.1	Map Your Needs and Assets <ul style="list-style-type: none"> <li>➤ Identify the needs of the community in relation to the type of CLC envisaged</li> <li>➤ Identify the assets of the community in relation to meeting the foregoing needs</li> </ul>
2.2	Develop Mission Statement <ul style="list-style-type: none"> <li>➤ Prepare a statement of values and purpose for the CLC</li> <li>➤ Identify the kinds of results that the partners expect from the CLC</li> <li>➤ Establish an appropriate set of principles to guide the operation of the CLC</li> <li>➤ Combine the foregoing elements to draft a mission statement</li> <li>➤ Determine how the proposed CLC affects each partner's mission statement</li> </ul>
2.3	Allocate Responsibilities and Resources <ul style="list-style-type: none"> <li>➤ Structure the CLC to meet identified needs, while dealing with contextual realities</li> <li>➤ Given the structure of the CLC, assign appropriate roles and responsibilities to the partners</li> <li>➤ Given these decisions, assign appropriate roles and responsibilities to the operational team</li> <li>➤ Given the above decisions, determine the general parameters governing the allocation of resources for the CLC</li> </ul>
2.4	Conclude Partnership Agreement <ul style="list-style-type: none"> <li>➤ Establish an appropriate process for concluding the Partnership Agreement</li> <li>➤ Determine the content of the Partnership Agreement</li> <li>➤ Produce the anticipated output for Step 2: A signed Partnership Agreement</li> </ul>

<b>ACTION STEPS AND OPERATIONAL CHALLENGES</b>	
<b>3 PLAN</b>	
✓	<p>Determine Desired Results</p> <ul style="list-style-type: none"> <li>➤ Seek points of convergence between the results sought by the various partners</li> <li>➤ Establish a mutually beneficial chain of intended results</li> </ul>
3.1	<p>Determine Programs and Services to Be Offered</p> <ul style="list-style-type: none"> <li>➤ Determine the activities that are likely to produce the short-term results that have been set for service delivery</li> <li>➤ Establish a process to monitor service delivery that is both feasible and effective</li> </ul>
3.2	<p>Determine Capacity to Deliver Services</p> <ul style="list-style-type: none"> <li>➤ Develop a holistic understanding of the performance capacity for our CLC</li> <li>➤ Determine the activities that are likely to produce the short term-results that have been, or should have been, set for capacity development</li> <li>➤ Establish a process to monitor capacity building that is both feasible and effective</li> </ul>
3.3	<p>Determine Means to Evaluate Actions and Results</p> <ul style="list-style-type: none"> <li>➤ Establish the parameters that define the nature and limits of the evaluation</li> <li>➤ Decide how to plan the evaluation</li> <li>➤ Determine precisely what will be evaluated</li> <li>➤ Adopt performance standards for each object to be evaluated</li> <li>➤ Select appropriate indicators to measure the objects to be evaluated</li> <li>➤ Determine appropriate sources and methods of data collection and analysis for each indicator selected</li> </ul>
3.4	<p>Complete Action Plan</p> <ul style="list-style-type: none"> <li>➤ Establish an appropriate process for concluding the Action Plan</li> <li>➤ Determine how the CLC action plan fits with each partner's annual plan</li> <li>➤ Determine the content of the Action Plan</li> <li>➤ Produce the anticipated output for Step 3: An approved Action Plan</li> </ul>
3.5	<p>Allocate Resources and Begin Service Delivery</p> <ul style="list-style-type: none"> <li>➤ Carry out the plan for the delivery of services</li> <li>➤ Produce the first set of outputs anticipated for Step 4: Initial results from services provided to students and community</li> </ul>
<b>4 IMPLEMENT</b>	
4.1	<p>Allocate Resources and Conduct Capacity Building</p> <ul style="list-style-type: none"> <li>➤ Carry out the plan for building capacity</li> <li>➤ Produce the second set of outputs anticipated for Step 4: Initial results from capacity building of CLC</li> </ul>
4.2	<p>Monitor Service Delivery and Capacity Building</p> <ul style="list-style-type: none"> <li>➤ Carry out the plan for monitoring service delivery and capacity building</li> </ul>
4.3	

ACTION STEPS AND OPERATIONAL CHALLENGES	
✓	5 EVALUATE
5.1	<p>Collect the Data</p> <ul style="list-style-type: none"> <li>➤ Find the necessary data to produce the indicators chosen</li> <li>➤ Collect the data chosen after determining appropriate methods for this purpose</li> </ul>
5.2	<p>Analyze the Data</p> <ul style="list-style-type: none"> <li>➤ Process the data collected after determining appropriate methods for this purpose</li> <li>➤ Interpret the processed data after determining appropriate methods for this purpose</li> </ul>
5.3	<p>Report to Stakeholders</p> <ul style="list-style-type: none"> <li>➤ Document the entire evaluation process</li> <li>➤ Prepare a comprehensive report of the evaluation, including process, findings and recommendations</li> <li>➤ Undertake appropriate means to inform various groups of stakeholders about the evaluation</li> <li>➤ Ensure follow-up from the results of the evaluation, including the lessons learned</li> </ul>

# 1 EXPLORE



 [Templates, p. #](#)

## 1.1 See What CLCs Look Like in Other Communities

### Your Synthesis of Community Schools

Use this template to synthesize what you have learned about CLCs in other communities.

Guiding Questions	Your Synthesis	Valuable Sources of Information
What are the principal characteristics of a CLC?		
What are the benefits of a CLC for different groups of stakeholders?		
What kinds of services do CLCs generally provide?		
What are the key factors that facilitate success?		
What are the key factors that inhibit success?		

## 1.2 Create an Image of a CLC for Your Community

### Community Boundaries

Use this template to define the boundaries of your CLC community.



Templates, p. #

A. Elements Defining Community	
Element	Description
Geography	Geographically defined catchment area of the organization or group, localities where the vast majority of students/clients live, or area within which it is located.
Mission	Particular vocation of the organization or group.
Language/Culture	Subset(s) of a population defined by language or culture targeted by the organization or group.
Stakeholders	Those persons, groups or organizations that have a 'stake' in the organization or group (see definition).
Other	

B. Individual Organization or Group: [Name]		
Element	Relevance	Description
Geography		
Mission		
Language/Culture		
Stakeholders		
Other		
Definition of Community:		
Contextual Features		Description

C. Potential CLC		
Element	Relevance	Description
Geography		
Mission		
Language/Culture		
Stakeholders		
Other		
<b>Definition of CLC Community:</b>		
<b>Contextual Features</b>		<b>Description</b>

### A Vision of Your CLC

Use this template to guide a conversation with potential partners to create a vision of what a CLC could look like in your community.

 [Templates, p. #](#)

A. Creating a CLC as a 'learning community'		
Driving Forces ⇨	Wt*	⇨ Restraining Forces

\* **Wt** = strength (weight) of driving or restraining force: 1 = weak; 2 = moderate; 3 = strong.

B. Creating a CLC as a 'hub' of community services	
Driving Forces ⇨	Wt*

\* Wt = strength (weight) of driving or restraining force: 1 = weak; 2 = moderate; 3 = strong.

C. Creating a CLC as proposed by the Framework	
Driving Forces ⇨	Wt*

\* Wt = strength (weight) of driving or restraining force: 1 = weak; 2 = moderate; 3 = strong.

D. Vision Statement	
Vision	
Actions	

## 1.3 Decide to Proceed



### Your Readiness Quotient (RQ)

Use this template to determine the 'readiness quotient' or RQ of the emerging partnership to form a CLC.

	Indicators of Readiness:	Rating*		Comments	Actions
		My	All		
1	<b>Legal/Administrative Readiness:</b> my organization/group's legal and administrative framework permits its participation in the CLC.				
2	<b>Cultural readiness:</b> my organization/group has an organizational culture that will accept the CLC.				
3	<b>Leadership readiness:</b> leadership support for the CLC exists in my organization/group and the partners.				
4	<b>Vision and Strategic Readiness:</b> my organization/group and the partners have a clear vision of where the CLC is going and how it should get there, or a clear desire to create such a vision.				
5	<b>Collaborative readiness:</b> my organization/group and the partners are prepared to be involved and work together collaboratively to make the CLC a reality.				
6	<b>Resource readiness:</b> the partners are prepared to commit the financial and other resources necessary to create the CLC.				
7	<b>Systemic readiness:</b> the partners have or will have the necessary systems in place to undertake the creation of the CLC.				

My organization's RQ	
The RQ of the Partnership	

\* **Rating Scale:** 1 to 5, where 1 =very low and 5 =very high state of readiness; N =No Opinion.  
**RQ:** sum of five scores from above (minimum = 5; maximum = 25).

## 2 INITIATE



[Templates, p. #](#)

### 2.1 Map Your Needs and Assets

#### A Map of Community Needs and Assets

Use this template to determine: (a) the unmet needs of various target groups; (b) the untapped resources that could be used to meet these needs; and (c) the role the CLC could usefully play to meet these needs.

A. Unmet Needs						
Target Group	Desired State		Current State		Gap	
Type of Result						
Level of Need						
Beneficiaries						
Services						
Resources						
Estimated number of beneficiaries (N)						
Severity of Beneficiary Needs						
	Low	Moderate	High	All		
Estimated percentage of N	+	+	=	100 %		





Templates, p. #

## 2.2 Determine Mission Statement

### Partner Mission Statements

Use this template to provide a description of the mission of each partner organization and decide on the values and purpose of the CLC.

<b>A. Mission of [Name of Partner]</b>
<b>Key Descriptors:</b>
How would you describe the <b>vision</b> that underpins the mission of the organization?
What are the core <b>values</b> of the mission?
What, briefly stated, is the <b>purpose</b> of the organization?
What <b>attributes</b> does the mission ascribe to your organization?
What is the <b>strategic direction</b> set by the mission?
<b>B. Values and Purpose of the CLC</b>

### Results Areas

Use this template to provide a broad-brush statement of the types of results expected by each of the partners.



A. Partner Input	
Results Areas	Priority*

B. Consensus for CLC	
Results Areas	Priority*

\* Indicate the relative priority of each results area as: 1 (low), 2 (moderate) or 3 (high).

### Guiding Principles

Use this template to develop a set of guiding principles for the CLC.

 [Templates, p. #](#)

Theme	Statement
...	

### Harmonizing Mission Statements

Use this template to ascertain the potential impact of the proposed CLC mission statement on the mission of each partner.

 [Templates, p. #](#)

A. Mission Statement of [Name of Partner]	
Review Questions	Comments
Are the values of the proposed CLC compatible with the values of your organization or group?	
What impact, if any, will the proposed CLC have on the identity of your organization or group?	
Does the proposed CLC displace or otherwise affect the present goals of your organization or group?	
...	

B. Review of Partner Input	
Review Questions	Comments (from Part A), implications and options
Values	
Identity	
Goals	
...	

C. Resolution		
Object	Decisions	Actions to Be Taken
Partner Missions:		
CLC Mission		

**Draft CLC Mission Statement**

Use this template to consolidate the results of the foregoing to complete a draft mission statement to be included in the Partnership Agreement in Step 2.4.



A. Draft Statement
Values and Purpose:
Results Areas:
Guiding Principles:

B. Review of Draft Statement	
Review Questions	Reservations, comments and questions
✓	
The process used to develop the mission was open, providing everyone an opportunity to express his or her views.	
The process enabled a consensus to be formed about the proposed mission.	
As a result of this process, I believe that my organization or group will endorse the proposed mission.	
The mission statement expresses the values I think the CLC should hold.	
The elements of the mission statement are important to me.	
The elements contained in the mission statement fit together.	
The mission statement is clear and can be understood by all stakeholders.	

## 2.3 Allocate Responsibilities and Resources

### Structuring Your CLC

Use this template to decide on the right model for your situation.

 Templates, p. # \_\_\_\_\_

A. Comparing Models	
Models	Advantages and Disadvantages
Parallel	
Integrated	
Single-site	
Multisite	

B. Ranking Models	
Model	Rank*
Parallel Single-site	
Integrated Single-site	
Parallel Multisite	
Integrated Multisite	

Assign 4 to your first choice; 3 to your second choice; 2 to your third choice; 1 to your fourth choice. If you think any model should not be considered at all, assign 0 (zero) (e.g. if you only think two models should be considered, you ranking would be: 4-3-0-0).

<b>C. Proposed Structure of the CLC</b>	
---	--

### Assigning Roles and Responsibilities

Use this template to assign roles and responsibilities to the body represented by each segment.



A. The Partners		
Areas	Roles and Responsibilities	Ind
General Functions		
Programs and Services		
Resources		
Other Matters		

<b>B. The Operational Team</b>		
<b>Areas</b>	<b>Roles and Responsibilities</b>	<b>Terms and Conditions</b>
Accountability/Reporting		
General Functions		
Programs and Services		
Resources		
Other Matters		

<b>C. Coordinator/Facilitator</b>		
<b>Areas</b>	<b>Roles and Responsibilities</b>	<b>Terms and Conditions</b>
Accountability/Reporting		
General Functions		
Programs and Services		
Resources		
Other Matters		

<b>D. Other (Specify)</b>		
<b>Areas</b>	<b>Roles and Responsibilities</b>	<b>Terms and Conditions</b>
Accountability/Reporting		
General Functions		
Programs and Services		
Resources		
Other Matters		

### Allocating Resources

Use this template to decide on the allocation of resources by each partner.



Templates, p. #

Areas	Source	Contribution	Terms and Conditions
Financial Resources			
Human Resources			
Material Resources			

## 2.4 Conclude Partnership Agreements

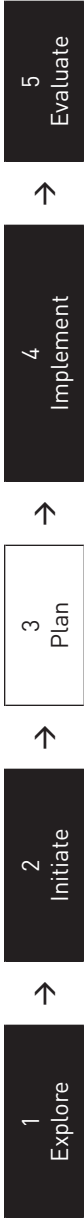
### The Partnership Agreement

Use this template to record the terms of the Partnership Agreement.

Templates, p. #

Main Sections	Provisions
<b>The Partners</b>	
<b>Mission Statement</b> Values and Purpose Results Areas Guiding Principles	
<b>Division of Responsibilities</b> CLC Structure The Partners Operating Team Coordinator/Facilitator Other	
<b>Allocation of Resources</b>	
<b>Other Provisions</b>	

### 3 PLAN



Templates, p. # \_\_\_\_\_

### 3.1 Determine Desired Results

#### Points of Convergence

Use this template to ascertain the points of convergence between partners and the CLC.

Results Chain	Partner Results: [Name of Partner]	CLC	
		Results	RA Comments
Long-Term Results (Impact)			
Medium-Term Results (Outcomes)			
Short-Term Results (Outputs)			

### Statement of Intended Results

Use this template to prepare a statement of intended results for the long, medium and short term, for both service delivery and capacity building.



A. Impact					
RA	Code	Intended Results	✓	Time Frame	Assumptions



B. Outcomes					
RA	Code	Intended Results	Links	Time Frame	Assumptions
1. Service Delivery					
			✓		
2. Capacity Building					



C. Outputs					
RA	Code	Intended Results	Links	Time Frame	Assumptions
1. Service Delivery					
			✓		
2. Capacity Building					

### 3.2 Determine Programs and Services to Be Offered

 Templates, p. # \_\_\_\_\_

#### Analyzing Proposed Services

Use this template to compare and contrast each set of alternatives for any given service you wish to consider.

<b>Option 1</b>	
<b>Strengths</b>	<b>Weaknesses</b>
<b>Opportunities</b>	<b>Threats</b>

<b>Option 2</b>	
<b>Strengths</b>	<b>Weaknesses</b>
<b>Opportunities</b>	<b>Threats</b>

### Service Activities

Use this template to record the activities to deliver services you have selected, including for each: its code, \* title and the other information requested.

 [Templates, p. #](#)

Service Activities		Outputs	Time Frame	Description	Resources/Conditions
RA Code	Title				

\*Un code est simplement un signe permettant de reconnaître les résultats dans les autres modèles.

### Service Activities Work Plan

Use this template to plan the activities to deliver services you have selected by specifying the information requested for each task.

 [Templates, p. #](#)

Code	Tasks	Days	Responsible	Key Dates





B. Overall Capacity of the CLC		
Capacities	Analysis	Rating*
Organizational Culture		
Resources		
Organizational Structure		
Management Systems		
External Linkages		
Strategic Leadership		

\* Rating of the seriousness of each capacity issue: 1 = low; 2 = moderate; 3 = high.

### Capacity-Building Activities

Use this template to record the activities to build capacity that you have selected, including for each: its code,\* title and the other information requested.

 [Templates, p. #](#)

Capacity-Building Activities		Outputs	Time Frame	Description	Resources/Conditions
RA Code	Title				

\*Un code est simplement un signe permettant de reconnaître les résultats dans les autres modèles.

### Capacity-Building Activities Work Plan

Use this template to plan the activities to build capacity that you have selected by specifying the information requested for each task.

 [Templates, p. #](#)

Code	Tasks	Days	Responsible	Key Dates



## 3.4 Determine Means to Evaluate Actions and Results

### Statement of Ethics

Adopt or adapt the following as a statement of ethics for the evaluation of the CLC.



<p><b>1 Nature and Purpose of the Evaluation</b></p>	<p>We are undertaking this evaluation on behalf of the [name of CLC] in order to find out how well this centre is doing in relation to various matters judged to be important to its stakeholders. It shall be conducted in accordance with these ethical guidelines, which shall be made available to relevant stakeholders, together with a written description of the evaluation.</p>
<p><b>2 Relationships With Participants</b></p>	<p>All interactions with 'participants' during this evaluation shall be conducted in an ethical, professional manner, based on respect, honesty and openness.            (a) A 'direct participant' is someone who takes part in the evaluation by completing a questionnaire, being part of an interview, focus group or observed activity.            (b) An 'indirect participant' is anyone about whom a third party provides information.</p>
<p><b>3 Information</b></p>	<p>We shall provide all prospective direct participants with a description of the evaluation, as well as an explanation of the nature and implications of their involvement.</p>
<p><b>4 Privacy</b></p>	<p>Except for the 'routine information' listed in Guideline #9, we shall ensure that the disclosure of information about or the direct participation of every individual is voluntary, with no coercion of any kind applied, including the right to allow only partial disclosure or not to participate in any part of the evaluation and to cease participating at any time.</p>
<p><b>5 Confidentiality</b></p>	<p>We shall ensure that 'raw data' [i.e. information as collected from and about participants] are treated confidentially and shared only with authorized members of our evaluation team, who have undertaken to respect the confidentiality of the data. This information may be used by future evaluation teams under these same conditions.</p>
<p><b>6 Anonymity</b></p>	<p>Categories of respondents [e.g. teachers, female students] may be identified in the evaluation report or other media; however, we shall protect by all reasonable and appropriate means the identity of any individual participant in any such report or other media, unless that person has explicitly consented in writing to be identified.</p>
<p><b>7 Informed Consent</b></p>	<p>Except for the 'routine information' listed in Guideline #9, we shall obtain written consent from each participant in advance of the data collection, having first informed him or her:            (a) about the evaluation (as per Guideline #3)            (b) about the type of participation requested            (c) that participation is voluntary, including the right to withdraw at any time            (d) that all information received shall be treated confidentially</p>

<p><b>8 Special Cases</b></p>	<p>In the case of a minor, we shall ensure that the written consent of a parent or legal guardian (as per Guideline #7) shall be obtained. Moreover, consent shall also be sought from the participant unless he or she is too young to understand. In the case of any other person incapable of giving informed consent, we shall ensure that the written consent of a parent or legal guardian (as per Guideline #7) shall be obtained.</p>
<p><b>9 Routine Information</b></p>	<p>Consent shall not be requested to collect or use the following types of information:                  (a) written, verbal or observational data about staff (e.g. qualifications and experience) or about students (e.g. test results) that do not identify the participant or permit him or her to be identified                  (b) data from current students about academic work or school/community activities (e.g. student rating of classroom teaching)                  (c) job-related data from current staff (e.g. feedback on school organization)                  However, the principles of confidentiality and anonymity stipulated above (as per Guidelines #5 and 6) shall be respected concerning the use of these data.</p>
<p><b>10 Data Analysis and Reporting</b></p>	<p>We undertake that the analysis and reporting of data shall be conducted ethically and honestly so as to produce fair and accurate findings about the school, and that the data shall only be used for the purposes described in Guideline #1.</p>
<p><b>11 Conservation of Data</b></p>	<p>The evaluation team leader shall be responsible for ensuring that the raw data and other materials from the evaluation shall be conserved for a minimum of two years; the confidentiality provisions of Guideline #6 apply to all data so conserved.</p>
<p><b>12 Commitment</b></p>	<p>The commitments made in this Statement of Ethics are known and have been agreed to by the [name of CLC], its partners, staff and associates who are likewise bound by these guidelines.</p>
<p>Name*</p>	<p>_____</p>
<p>Signature</p>	<p>_____</p>
<p>Date</p>	<p>_____</p>

\* Person authorized on behalf of the CLC.

## Auditing the Evaluation

Use this template to conduct an audit of the evaluation.



Templates, p. #

Focus	A. Parameters of the Evaluation (Step 1)
<b>Guiding Questions</b>	<ul style="list-style-type: none"> <li>Do the purpose and scope of the evaluation appear to be appropriate, given the mission of the CLC and its context, as well as the range of its activities and intended results?</li> <li>Do the other parameters governing the evaluation, notably the ethical standards to be followed, provide a trustworthy basis for the evaluation?</li> </ul>
<b>Evidence</b>	<ul style="list-style-type: none"> <li>The Boundaries of the CLC</li> <li>Partnership Agreement</li> <li>Action Plan</li> <li>Statement of Ethics and consent forms</li> </ul>
<b>Audit Notes</b>	
<b>Follow-Up</b>	

Focus	B. Objects to Be Evaluated (Step 2)
<b>Guiding Questions</b>	<ul style="list-style-type: none"> <li>Do the objects chosen to be evaluated reflect the purpose and scope of the evaluation established in Step 1?</li> <li>Are any outcomes that could be evaluated included; if not, is there a reasonable explanation for their exclusion?</li> <li>Are all current activities included; if not, does the selection of activities appear to be reasonable?</li> <li>Are the outputs included for all current activities selected?</li> <li>Does the selection of the operational performance of selected activities appear to be reasonable?</li> <li>Overall, do the objects chosen to be evaluated provide a trustworthy reflection of the performance of the CLC?</li> </ul>
<b>Evidence</b>	<ul style="list-style-type: none"> <li>Evaluation Grid</li> <li>Evidence from Step 1</li> </ul>
<b>Audit Notes</b>	
<b>Follow-Up</b>	

<b>C. Performance Standards (Step 3)</b>	
<b>Focus</b>	
<b>Guiding Questions</b>	<ul style="list-style-type: none"> <li>• Were appropriate performance standards developed for each object to be evaluated?</li> <li>• Does each standard have appropriate and explicit criteria by which it can be judged?</li> <li>• Were any benchmarks used; if so, do they seem appropriate?</li> <li>• Were any performance targets used; if so, do they seem appropriate?</li> <li>• Overall, do the standards selected provide a trustworthy reflection of the performance of the CLC in relation to the objects of the evaluation?</li> </ul>
<b>Evidence</b>	<ul style="list-style-type: none"> <li>• Evaluation Grid</li> <li>• Evidence from Step 2</li> </ul>
<b>Audit Notes</b>	
<b>Follow-Up</b>	

<b>D. Performance Indicators (Step 4)</b>	
<b>Focus</b>	
<b>Guiding Questions</b>	<ul style="list-style-type: none"> <li>• Were appropriate performance indicators developed for each object to be evaluated, given the standards set for each?</li> <li>• Does each indicator provide a valid and dependable measure of the object to which it relates?</li> <li>• Overall, do the indicators selected provide a trustworthy measure of the performance of the CLC in relation to the objects of the evaluation?</li> </ul>
<b>Evidence</b>	<ul style="list-style-type: none"> <li>• Evaluation Grid</li> <li>• Evidence from Step 3</li> </ul>
<b>Audit Notes</b>	
<b>Follow-Up</b>	

<b>E. Sources of Data (Step 5)</b>	
<b>Focus</b>	
<b>Guiding Questions</b>	<ul style="list-style-type: none"> <li>• Do the sources of data chosen provide a trustworthy basis for producing the indicators examined in Step 4?</li> <li>• Was any sampling done; if so, were the methods used consistent with generally accepted practices in this regard?</li> <li>• Overall, do the sources of data chosen provide a trustworthy basis for the evaluation?</li> </ul>
<b>Evidence</b>	<ul style="list-style-type: none"> <li>• Evaluation Grid</li> <li>• Statement of Ethics and consent forms</li> <li>• Methodological notes</li> <li>• Evidence from Step 4</li> </ul>
<b>Audit Notes</b>	
<b>Follow-Up</b>	

<b>F. Data Collection (Step 6)</b>	
<b>Focus</b>	
<b>Guiding Questions</b>	<ul style="list-style-type: none"> <li>• Can each of the instruments used for the collection of data be considered valid and dependable means to collect the data envisaged?</li> <li>• Was the actual collection of data conducted in accordance with generally accepted practices in this regard, including all applicable ethical standards?</li> <li>• Do the data actually collected reflect the data envisaged in accordance with generally accepted practices in this regard, including response rates versus sample and target populations?</li> <li>• Overall, do the data actually collected provide a trustworthy basis for the evaluation?</li> </ul>
<b>Evidence</b>	<ul style="list-style-type: none"> <li>• Data collection instruments</li> <li>• Methodological notes</li> <li>• Evidence from Step 5</li> </ul>
<b>Audit Notes</b>	
<b>Follow-Up</b>	

<b>G. Data Analysis (Step 7)</b>	
<b>Focus</b>	
<b>Guiding Questions</b>	<ul style="list-style-type: none"> <li>• Have the raw data (both quantitative and qualitative) been processed in accordance with generally accepted practices in this regard?</li> <li>• Do any data summaries (both quantitative and qualitative) reflect the data they are meant to represent in accordance with generally accepted practices in this regard?</li> <li>• Are the methods, including any instruments used, for the analysis of data consistent with generally accepted practices in this regard?</li> <li>• Overall, does the data analysis present a fair and balanced interpretation of the data?</li> <li>• Overall, does the data analysis provide a trustworthy basis for the evaluation?</li> </ul>
<b>Evidence</b>	<ul style="list-style-type: none"> <li>• Methodological notes</li> <li>• Data tables</li> <li>• Evidence from Step 6</li> </ul>
<b>Audit Notes</b>	
<b>Follow-Up</b>	

<b>H. Evaluation Report (Step 8)</b>	
<b>Focus</b>	
<b>Guiding Questions</b>	<ul style="list-style-type: none"> <li>• Do the findings flow from the data analysis (Step 7)?</li> <li>• Do the conclusions flow from the findings?</li> <li>• Do the recommendations flow from the conclusions?</li> <li>• Overall, does the evaluation report present a fair and balanced account of the evaluation?</li> <li>• Overall, is the evaluation trustworthy?</li> </ul>
<b>Evidence</b>	<ul style="list-style-type: none"> <li>• Evaluation report</li> <li>• Evidence from Step 7</li> </ul>
<b>Audit Notes</b>	
<b>Follow-Up</b>	

## Evaluation Boundaries

Use this template to confirm the boundaries of the evaluation.



Templates, p. #

Element	As stated by the Framework	As revised (if applicable)
Purpose	This evaluation is meant to serve the dual purpose of accountability to the stakeholders of the CLC and improvement of its performance.	
Outputs	The immediate outputs of the evaluation are the evaluation reports and other forms of communication to stakeholders.	
Outcomes	The outcomes of the evaluation are enhanced organizational capacity and performance.	
Scope	The scope of the evaluation shall be limited to a manageable set of evaluation questions concerned with key areas of performance.	
Performance	Performance is defined as the extent to which the CLC <i>operates and achieves results</i> in accordance with the expectations of stakeholders.	
Operational Performance (Conduct and Efficiency)	The evaluation of operational performance focuses on the conduct of activities to build capacity and deliver services, more specifically, the extent to which they have been carried out in accordance with our expectations, as well as the efficiency of this process, that is, how well resources have been allocated and managed.	
Results-Based Performance (Effectiveness)	The evaluation of results-based performance focuses on the effectiveness of the CLC: the extent to which short-term results and, <i>as far as possible</i> , the progress toward medium-term results have been achieved.	

### Evaluation Work Plan

Use this template to plan the evaluation to be carried out in Step 5.



A. Tâches et responsabilités				
Steps	Tasks	Days	Responsible	Key Dates
3.4 (Plan)				
5.1 (Data Collection)				
5.2 (Data Analysis)				
5.3 (Reporting)				

B. Evaluation Resources						
Activities	Personnel			Other Costs		Total
	Professional		Technical	Printing	...	
	Days	Amt	Days			
Step 3.4		\$		\$		\$
Step 5.1		\$		\$		\$
Step 5.2		\$		\$		\$
Step 5.3		\$		\$		\$
<b>Grand Total</b>		\$		\$		\$

### Evaluation Grid

Use this template to set forth what aspects of performance will be evaluated (**Objects**), the evaluation **standards** to be used (including any **targets** or **benchmarks**) and *how* the performance will be evaluated (**Indicators** and **Sources and Methods**).



Templates, p. #

Activity			
Objects	Standards	Indicators	Sources and Methods
Outcomes:			
•	•	•	•
Outputs:			
•	•	•	•
Conduct:			
•	•	•	•
Efficiency:			
•	•	•	•

Activity			
Objects	Standards	Indicators	Sources and Methods
Outcomes:			
•	•	•	•
Outputs:			
•	•	•	•
Conduct:			
•	•	•	•
Efficiency:			
•	•	•	•

### 3.5 Complete Action Plan

#### Harmonizing Strategic Planning

Use this template to review the potential impact of the CLC Action Plan on the annual plan of each partner.

A. Annual Plan of [Name of Partner]	
Review Questions	Comments
Are the actions of the proposed CLC action plan compatible with the measures outlined in the organization's annual plan?	
Do any aspects of the CLC evaluation plan conflict with or otherwise affect the present evaluation elements included in the organization's annual plan?	
...	

B. Review of Partner Input	
Review Questions	Comments (from Part A), Implications and Options
Actions	
Evaluation	
...	

C. Resolution	
Object	Actions to Be Taken
Partner Plans:	
Partner ..., [name]	
Partner ..., [name]	
CLC Action Plan	

**The Action Plan**

Use this template to complete the Action Plan, first as a draft document, then as an approved plan.

**Intended Results**

**Activities**

**Monitoring**

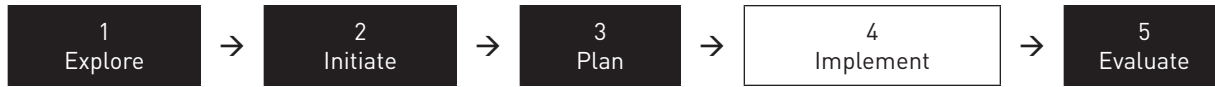
**Evaluation**

**Work Plan**

**Resources**

 [Templates, p. #](#)

## 4 IMPLEMENT



### 4.1 Allocate Resources and Begin Service Delivery

(There are no templates for this step.)

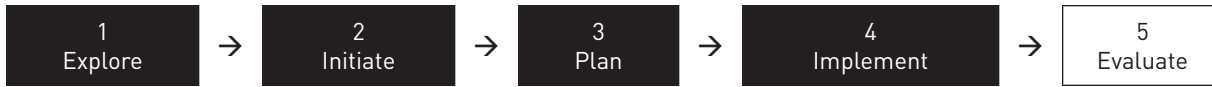
### 4.2 Allocate Resources and Conduct Capacity Building

(There are no templates for this step.)

### 4.3 Monitor Service Delivery and Capacity Building

(There are no templates for this step.)

## 5 EVALUATE



### 5.1 Collect the Data

 **Guidebook**, p. 165

#### Creating a Sample

Use this template to design either a representative or a purposive sample of one or more target populations.

A. Representative Sample			
Target Population		Sample	
Group	Number	Number	Percent
Students			
Teachers			
Parents			
Community members			
...			

B. Purposive Sample			
Group	Purpose	Criteria	Number
Students			
Teachers			
Parents			
Community members			
...			

 Templates, p. #

## Sample Consent Forms

Adapt the following to obtain consent from anyone requested to act as a direct participant in the evaluation of the CLC.

### PARENTAL CONSENT LETTER

Dear Students and Parent or Guardian:

By now, we hope you have heard about [name of CLC] which is completing its first year of operation. Briefly, our CLC was formed [include a brief statement about the CLC and its partners].

This letter is to inform you that we are conducting an evaluation of the centre's performance in relation to various matters that we think are important for us.

The purpose of our study is to collect, analyze and communicate information about the centre to staff, students, parents and the community, and to use this information for developing action plans for the future. Data will be gathered from documents and records as well as from other sources such as questionnaires completed by students, teachers and parents.

We are presently organizing a public forum to focus on teaching and learning in our centre, including a panel of students, and open to members of the school community and the media. Panel members will be asked to give their opinions on their experience in this school in relation to the topic and to participate in an exchange with fellow panellists, moderated by a member of the evaluation team. The moderator will provide for a brief time for questions from the audience which students will be invited to answer if they wish.

We hereby request your agreement to allow your child to participate as a member of this panel, in accordance with the attached Declaration of Consent form.

We appreciate your cooperation and ask students and parents of students who are under 18 years of age to please sign the attached consent form and return it to the centre by [date]. If you have any questions, please phone me at [telephone number].

Yours very truly,

[Name],

[Title]

[Name of CLC]

**DECLARATION OF CONSENT**\_\_\_\_\_  
Name of Student\_\_\_\_\_  
Name of Parent  
or Guardian

I am a parent or guardian of the student named above. I understand that the [name of CLC] is conducting an evaluation of its performance; I have read and understood the covering letter and [if applicable] information flyer which was attached to this form.

I consent to my son, daughter or ward participating as a panellist in a public forum on teaching and learning, to be held at [time, date and place]. This consent is given on the understanding that:

- participation is voluntary and this consent may be withdrawn at any time
- the forum will be audio taped by the centre but these tapes and the notes taken by team members will be treated confidentially
- he or she will not be identified in any report

\_\_\_\_\_  
Signature of Student\_\_\_\_\_  
Date

Please check here if you are 18 years of age or older.

\_\_\_\_\_  
Signature of Parent or Guardian  
(For students under 18 years of age)\_\_\_\_\_  
Date

I give my assurance that the information I receive will be used only for the purposes of the study, according to the terms and conditions described to you.

\_\_\_\_\_  
Signature of CLC  
representative\_\_\_\_\_  
Date

 Templates, p. #

## Sample Instruments

Use the sample instruments shown below as a basis for constructing your own instruments for collecting data.

<b>Thousand Hills CLC-Evaluating Our Performance What Stakeholders Say</b>	
<b>General Instructions</b>	<ul style="list-style-type: none"> <li>• The purpose of this instrument is to gather information about how well our centre is doing in relation to various topics.</li> <li>• There are no right or wrong answers and if you do not feel you can answer any particular question, please just check <b>N</b> for 'no opinion.'</li> <li>• Please do not write your name anywhere on this questionnaire so that your answers will be completely anonymous.</li> </ul>

<b>Background Data</b>							
Name of Organization							
Respondent Role	<input type="checkbox"/> Student	<input type="checkbox"/> Teacher	<input type="checkbox"/> Parent	<input type="checkbox"/>	<input type="checkbox"/>		
	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/> Other:			
Grade (Students only)	<input type="checkbox"/> K	<input type="checkbox"/> 1	<input type="checkbox"/> 2	<input type="checkbox"/> 3	<input type="checkbox"/> 4	<input type="checkbox"/> 5	<input type="checkbox"/> 6
	<input type="checkbox"/> SI		<input type="checkbox"/> SII	<input type="checkbox"/> SIII	<input type="checkbox"/> SIV	<input type="checkbox"/> SV	
Gender	<input type="checkbox"/> Male		<input type="checkbox"/> Female				

<b>Teaching and Learning</b>						
<p>Below you will find a series of statements. For example: <i>My school has a friendly atmosphere.</i> We would like you to tell us how much each one reflects your experience at school by placing a check mark (✓) in the box under the appropriate number in the space provided, using this scale:</p> <p style="text-align: center;">1=Strongly Disagree 2=Disagree 3=Agree 4=Strongly Agree N=No Opinion</p>						
#	Statement	Rating				
		1	2	3	4	N
1	My school is challenging me to do my best.					
2	This school makes me feel that I belong here.					
3	My school is helping me to develop a curiosity for learning.					
4	My school is helping me to develop the ability to learn on my own.					
5	My school is helping me to learn to get along with others.					

Parental Involvement						
Please check (✓) how often you participate in the activities listed below respecting the education of your child, using this scale: 1=Never 2=Rarely 3=Occasionally 4=Frequently N=No Opinion						
#	Statement	Rating				
		1	2	3	4	N
1	Assisting your child in doing homework					
2	Checking that homework is completed					
3	Responding to teacher communiqués					
4	Attending parent/teacher interviews					
5	Reviewing progress reports with your child					

School Facilities													
Please check (✓) the rating that best reflects the general condition of your school building, using this scale: 1=Very Poor 2=Inferior 3=Standard 4=Superior N=No Opinion													
#	Location	Cleanliness					#	Maintenance					
		1	2	3	4	N		1	2	3	4	N	
1	Classrooms						11						
2	Hallways						12						
3	Washrooms						13						
4	Gym						14						
5	Library						15						
6	Entrance						16						
7	Staff Room						17						
8	Office						18						
9	Cafeteria						19						
10	Grounds						20						

<b>Voices from the Community</b>		
<b>Start-Up</b> (10 min.)	<ul style="list-style-type: none"> <li>• [Intro] Good evening, my name is ... I have been asked by the Thousand Hills CLC to moderate this focus group. My colleague, ..., is going to record our discussion and keep notes. More about this role in a minute but first let me explain why we are here.</li> <li>• [Purpose] All of you recently attended a program for community volunteers offered by the CLC. Some of you completed the program and others did not. As part of an evaluation of the CLC, we would like you to help us identify the strengths and weaknesses of this program, how well it met your needs and what you think might improve it. Before we begin, let me briefly go over the 'ground rules' for this session.</li> <li>• [Ground rules] Although we are recording this session, all material gathered here will be kept confidential. First names only will be used in the discussion and you will not be identified in any report. I will do my best to see that everyone has a chance to contribute so, because our time is restricted, some of you may be asked to limit your comments. Finally, rest assured that this session is not a 'feel good' exercise: we want to know what you really think and all constructive feedback is welcome.</li> <li>• [Participant intro] Let's go quickly around the table so you can each introduce yourself-just your first name and a brief word about yourself.</li> </ul>	
<b>Discussion</b> (90 min.)	<b>Guiding Questions</b>	<b>Probes*</b>
	• Why did you sign up for this program?	• Identification of different motivations, individual circumstances
	• Can you briefly describe your experience in this program: what was it like for you?	• Different aspects of the program; delivery, materials; interactions with instructor and peers
	• Can you briefly explain why the program met or did not meet your expectations?	• Any mismatch between individual and program expectations; reasons for dropping out (personal versus program)
	• What would you say were the major strengths and weakness of the program?	• Search for any patterns relating to participants or program; how weaknesses could be improved
	• Have you had a chance to make use of what you learned?	• Strength of linkages between program and anticipated outcomes; how program helped or did not help in real-life situation
<b>Wrap-Up</b> (20 min.)	<ul style="list-style-type: none"> <li>• In closing, is there anything that anyone would like to add? Thank you for your cooperation and input; it has been very helpful. We are planning to complete our report by [date] which will be available on our Web site: ...</li> </ul>	

\* Probes necessarily include follow-up on unexpected input from the general discussion.

## 5.2 Analyze the Data

### Quantitative Data Analysis

Use this template to design the data file structure and various displays of quantitative data, and then to analyze these data.

 [Templates, p. #](#)

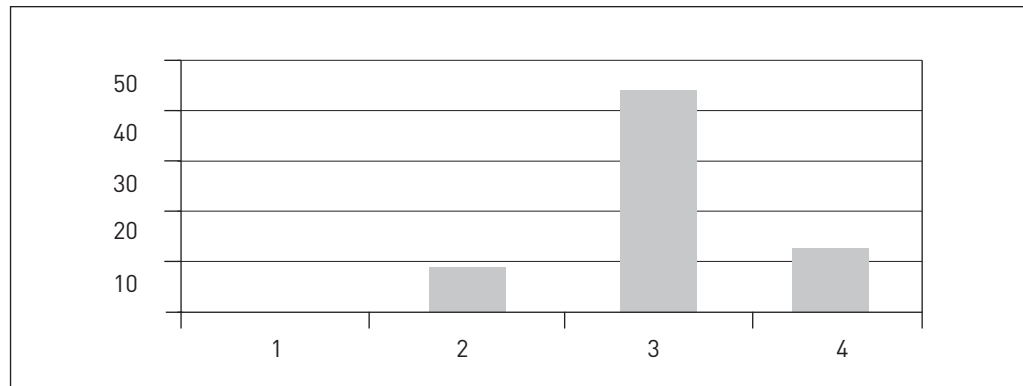
**SAMPLE DATA FILE STRUCTURE**

Res	B1	B2	Q1	Q2	Q3	Q4	Q5
1	1	1	3	3	3		3
2	1	1	3	3			3
3	1	1	3	3		3	3
4	1	1	3	3		3	4
5	1	2	3	4	3	4	2
6	2	2	2	3	3	4	2
7	2	1	3	2	3	3	2
8	2	2	3	3	3	4	3
9	2	1	3	3		3	2
10	2	2	3	3	3	3	3
11	3	2	4	4	4	4	3
12	3	2	4	3	4		3
13	3	2	4	4	3		3
14	3	2	2	3	3	3	3
15	3	2	3	3	2	3	2

**FREQUENCY DISTRIBUTION OF RESPONSES BY ITEM**

Item	Response Categories				Total
	1	2	3	4	
Q1	0	2	10	3	15
Q2	0	1	11	3	15
Q3	0	1	8	2	11
Q4	0	0	7	4	11
Q5	0	5	9	1	15
Total	0	9	45	13	67

### FREQUENCY DISTRIBUTION OF ALL RESPONSES COMBINED



### PERCENTAGE DISTRIBUTION OF RESPONSES BY ITEM

Item	Response Categories				Total
	1	2	3	4	
Q1	0 %	13 %	67 %	20 %	100 %
Q2	0 %	7 %	73 %	20 %	100 %
Q3	0 %	9 %	73 %	18 %	100 %
Q4	0 %	0 %	64 %	36 %	100 %
Q5	0 %	33 %	60 %	7 %	100 %
Total	0 %	13 %	67 %	19 %	100 %

### DISTRIBUTION OF MEAN RESPONSES

Item	Respondent Groups			All
	Students	Teachers	Parents	
1	3.00	2.80	3.40	3.07
2	3.20	2.80	3.40	3.13
3	3.00	3.00	3.20	3.09
4	3.33	3.40	3.33	3.36
5	3.00	2.40	2.80	2.73

### DATA COLLECTION POPULATION, SAMPLE AND RESPONSES

Respondents	Number			Percent
	Total	Sample	Response	
Students	589	589	423	72%
Teachers	32	32	21	65%
Parents	500	500	381	76%
Total	1 121	1 121	825	74%

## Qualitative Data Analysis

Use this template to design the data file structure and displays of qualitative data, and then to analyze these data.

 [Templates, p. #](#)

### SAMPLE QUALITATIVE DATA FILE STRUCTURE

N	Q#	Response
1	1	
1	2	
1	3	
2	1	
2	2	
2	3	
3	1	
3	2	
3	3	

### DATA SORTED BY ITEM

N	Q#	Response
1	1	
2	1	
3	1	
1	2	
2	2	
3	2	
1	3	
2	3	
3	3	

**RECORDING INTERVIEW DATA**

Respondent Id: Background characteristics:
<b>Questions and Answers</b>
<b>Question 1</b> : ... Response
<b>Question 2</b> : ... Response
<b>OR</b>
<b>Verbatim Transcript</b>
<b>Int:</b> ... <b>Res:</b> ...
<b>Int:</b> ... <b>Res:</b> ...

**CODING AND SORTING QUALITATIVE DATA**

<b>N</b>	<b>B1</b>	<b>...</b>	<b>B5</b>	<b>Q#</b>	<b>Des</b>	<b>Inf</b>	<b>Summary</b>
1				1	Lib	Pos	
2				1	Lib	Pos	
1				1	Lib	Nég	
3				1	Lib	Nég	
1				1	Com	Pos	
2				1	Com	Pos	
2				1	Com	Nég	

**SAMPLE DISPLAY OF CODED QUALITATIVE DATA**

<b>Descriptive Categories</b>	<b>Respondent Opinions</b>	
	Positive	Negative
Library	<ul style="list-style-type: none"> <li>• ...</li> <li>• ...</li> <li>• ...</li> </ul>	<ul style="list-style-type: none"> <li>• ...</li> <li>• ...</li> <li>• ...</li> </ul>
Computer Lab	<ul style="list-style-type: none"> <li>• ...</li> <li>• ...</li> <li>• ...</li> </ul>	<ul style="list-style-type: none"> <li>• ...</li> <li>• ...</li> <li>• ...</li> </ul>

## 5.3 Report to Stakeholders



Templates, p. #

### Evaluation Checklist

Use this template to review the evaluation as a preparatory step to completing the evaluation report.

Points to Be Reviewed	Check	Comments
<ul style="list-style-type: none"> <li>• A complete version of the evaluation plan, including any revisions made during the course of the evaluation.</li> </ul>		
<ul style="list-style-type: none"> <li>• A complete work plan document, including any revisions made during the course of the evaluation.</li> </ul>		
<ul style="list-style-type: none"> <li>• All of the raw data (completed questionnaires, interview notes etc.) gathered and catalogued.</li> </ul>		
<ul style="list-style-type: none"> <li>• Consent forms for all data for which consent was required.</li> </ul>		
<ul style="list-style-type: none"> <li>• The synthesis of the data in usable form (tables, summaries of stakeholder comments, etc.) gathered and catalogued.</li> </ul>		
<ul style="list-style-type: none"> <li>• The results of the data analysis: findings, interpretations, any tentative conclusions and recommendations.</li> </ul>		
<ul style="list-style-type: none"> <li>• A record of the process followed, with any issues for further investigation or action.</li> </ul>		

### Reporting to Stakeholders

Use this template to outline a strategy for reporting the evaluation to stakeholders.



Templates, p. #

<b>Overview of Reporting Strategy:</b>
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<b>[Name of report or communication strategy]</b>	
Target Audience	
Purpose and Results	
Key Issues	
Content	
Format	
Author(s)	
Resources	
Time Line	

<b>[Name of report or communication strategy]</b>	
Target Audience	
Purpose and Results	
Key Issues	
Content	
Format	
Author(s)	
Resources	
Time Line	