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# Developing a Management and Accountability Framework for the Quebec Federal Council

December 2003



QUEBEC FEDERAL COUNCIL





## Foreword

This report fulfils the mandate of developing a management and accountability framework for the Quebec Federal Council (QFC) and the tools required for its implementation. The mandate is part of the second phase of the modern comptrollership project. Sponsored by the QFC and carried out under the supervision of the director general of the QFC Office, the project was made possible by funding from the Comptrollership Modernization Directorate of the Treasury Board of Canada Secretariat.

The first phase of the project was completed in 2001–2002 and consisted in a review of literature on various horizontal management models. The second phase narrows the focus to integrating financial and non-financial performance information into the QFC's planning and management process via a results-based management and accountability framework. Such a framework would improve the QFC's strategic decision-making and strengthen its ability to demonstrate accountability. Phase II of the project began in September 2002 and will conclude at the end of fiscal 2003–2004.

Modern comptrollership is defined as a set of principles derived from a new way of thinking or management method. One of its principles is that stewardship of public resources should no longer be the sole domain of specialists; it must become a management function. Every modern manager, from the front line to the executive committee table, has to be capable of making decisions that bring together:

- Integrated financial and non-financial information
- Sound risk management
- Appropriate controls
- Public Service values and ethics

Our project focusses on one of the four pillars of modern comptrollership: the integration of financial and non-financial information. However, all the pillars are taken into account, as they form a complete whole.

In February 2003, the Treasury Board of Canada Secretariat published a manual for regional managers. Entitled *Managing Collaborative Arrangements*, the manual outlines the various key aspects one must consider to effectively establish and manage one or more partnership agreements. Our process is a continuation of such a work, but places particular emphasis on managing all partnerships created by a regional federal council.

To fulfil the mandate described above, a working group composed of members of the QFC Office and representatives of a number of federal institutions was created. Subgroups were occasionally formed to carry out specific aspects of the work. Three committees also volunteered to test the various tools and approaches: the Policy Committee, the Middle Managers' Network and the Quebec Federal Council on Information Technology. The Canada Customs and Revenue Agency agreed to create a management chart (a computer tool used to support the implementation of the management and accountability framework.)

## **Notes**

- Unless otherwise indicated, the activities and projects described in this report are being carried out in Quebec with federal institutions and employees from that region.
- The Management and Accountability Framework is constantly changing. This report covers work done as of December 2003. The framework may be amended, which would entail changes to the report.



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# Introduction

## Management and accountability

A management framework is a set of methods placed at the disposal of the managers of a company or institution for the purpose of achieving objectives. The term “accountability” refers to the requirement that managers be answerable for the manner in which they carry out their assigned responsibilities. A management and accountability framework would therefore be a set of methods placed at the disposal of managers to help them achieve objectives and be accountable for their assigned responsibilities.

In 1999, the federal government published a management and accountability framework entitled *Results for Canadians: A Management Framework for the Government of Canada*. Although very general in nature, the document sets out four major commitments:

- The government’s efforts to develop, assess or apply a program or initiative must have a citizen focus
- The management of federal institutions must be based on results
- Managers must comply with the values of the Public Service
- The government must ensure responsible spending

There is some overlap between these commitments and modern comptrollership principles. The Comptrollership Modernization Directorate of the Treasury Board of Canada Secretariat has been given a mandate to work with federal institutions to integrate financial and non-financial information relative to performance and risk management. The Branch must also ensure that results-based control mechanisms are put in place.

## Needs

Treasury Board’s *Policy on Transfer Payments* makes the development of a results-based management framework mandatory for some categories of programs involving transfer payments. However, the requirement does not apply to regional federal councils.

The horizontal activities of federal councils are specialized. More often than not, they arise from a desire for action on the part of employees of various federal institutions. The participation of the institutions varies depending on their mission and size and the nature of the issues. If they are to maintain or increase their commitment, institutions must have a vested interest in the outcome. It is therefore essential that they know whether the activities of federal councils really do make a difference and, more specifically, whether their investment will pay off.

The QFC's management and accountability framework seeks to address these information needs. The framework is currently in the experimental stage but is expected to do the following in the short term:

- Increase the efficiency and effectiveness of all QFC activities
- Report on the efforts and investments made by the institutions
- Demonstrate the QFC's value-added contribution
- Facilitate the implementation of new initiatives
- Clarify the roles and responsibilities of the various committees
- Specify the expected outcomes
- Promote consistency with the federal government's management model

The outcomes of the project could serve as a guide for the management of federal councils in other regions.

## Information

The Government of Canada's management framework specifies that managers must:

- Define the strategic results to be achieved
- Focus on achieving outputs
- Regularly and objectively measure performance
- Take advantage of the information collected
- Change their activities to enhance their efficiency and effectiveness

Since the publication of the government's management framework, the Treasury Board of Canada Secretariat has developed a number of tools to facilitate the implementation of the framework in federal institutions. Our analysis of these tools has shown that the following types of information must be collected, analysed and used:

- A profile of initiatives, ie, a concise description of the initiatives and their rationale, target clientele and expected outputs
- A logic model of the initiative, ie, the logical links between expected outputs, invested resources and activities carried out
- Data on ongoing performance measurement, ie, indicators that will report, on an ongoing basis, on outputs and achieved outcomes
- An in-depth analysis of the initiatives, ie, an assessment of their relevance, success and cost effectiveness
- A record of good practice, ie, the identification of lessons learned and best practices, for the purpose of improving performance

Conveying performance information in a structured way using reports was also advocated.

However, it is necessary to approach the various types of information in the light of each institution's specific situation, which is why a specific strategic approach is needed. In the QFC's project, the information collected has to focus on two key aspects:

- Improving the QFC's ability to manage horizontal activities by linking financial and non-financial information to outputs
- Improving the ability of committees to structure their initiatives based on a measurable approach

## **Obstacles**

However, our approach does involve a number of challenges and constraints:

- Horizontal initiatives are many and varied
- The duration of initiatives and their level of progress vary
- The number of institutions is high
- The lack of precedents and background information makes it necessary to innovate
- Determining costs chargeable to participating institutions can be touchy
- Contributions made by institutions are often informal
- Capacities are generally limited (availability of committee co-ordinators, resources needed to update information)
- Computer systems have to meet each institution's security and confidentiality standards
- Simplicity have to be preserved
- Expectations are high

## **Report**

Lastly, it should be mentioned that the purposes of this report are to:

- Report to the Treasury Board of Canada Secretariat on the work completed
- Present the choices made
- Produce a reference document for management chart designers (a computer tool related to the project), instructors, QFC Office planning officers, QFC committee co-ordinators, federal councils in other regions, and any federal institution wishing to build on our work



## **The QFC and its members**

Like the other regional federal councils, the QFC has been in operation for 20 years. In the beginning, the QFC was primarily an information-sharing forum, but it took on a broader role during the program review conducted in the mid-1990s. At that time, the central agencies recognized that federal institutions in the regions could play a pivotal role in developing policies, co-ordinating communications and trying out new modes of program and service delivery.

As specified in its mission statement, the QFC is “a network of mutual co-operation, support and joint action for resource mobilization to better serve citizens, foster sound management and promote federal endeavours.” The QFC brings together the top-ranking officials of some 30 federal institutions in Quebec to:

- Address common concerns
- Share information
- Share best practices
- Take a stand on regional issues and lobby at the national level

The QFC’s Executive Committee has 10 members. Its charter has been amended a number of times and sets out the QFC’s:

- Membership
- Mission, vision and values
- Terms and principles of operation

See Appendix 1 for a list of the QFC’s member institutions and current and potential partners.

## **The QFC Office**

The QFC Office is composed of an Executive Director and an associate director, administrative staff and co-ordinators. Its purpose is to support QFC members, manage a number of initiatives, support activity planning and follow-up, communicate information, take part in consultations, share expertise and co-ordinate budget submissions.

## Committees

About twenty committees are directly and indirectly involved in furthering the QFC's directions and priorities (see Appendix 2 for a list of committees). All the committees produce action plans and activity reports on an annual basis. Their members come from a variety of federal institutions who share common objectives and interests.

The committees support their members' development by meeting their learning needs, sharing information during their regular meetings and providing networking opportunities. They also provide tangible support for the institutions by promoting the sharing of best practices and carrying out interdepartmental projects.

Each committee includes a QFC member (sponsor) and a co-ordinator, who is generally in charge of following up on and managing the group's activities, in addition to the duties he or she assumes within his or her institution.

The QFC also has 10 regional round tables, which practise horizontal management depending on the context in which they operate and their concerns.

## Funding

The QFC's official budget covers roughly one third of the actual costs of its activities. The QFC receives funding from the following sources:

- Member institutions (dues)
- Treasury Board of Canada Secretariat
  - . Basic budget
  - . Special budgets (projects and activities)
- Public Service Commission of Canada and the home institutions of QFC Office co-ordinators
  - . Career Assignment Program
  - . Management Trainee Program

Two thirds of the QFC's budget is made up of resources provided by the institutions for the committees' various activities.

In 2001, the QFC reviewed its mandate and focussed on funding co-ordination activities (creating co-ordinator positions within the QFC Office to support interdepartmental activities) and strengthening its ability to develop strategic plans and priorities. In this way, a multi-year planning process was implemented. The QFC has identified four key priorities for supporting committee initiatives between now and 2006.

- Human resources  
As an employer of choice and a learning organization, ensure the recruitment, retention and development of employees in an inclusive public service where employees' well-being is paramount.

- Service delivery  
As a network of mutual co-operation, support and joint action, improve service delivery to better serve the public.
- Horizontal governance  
Contribute to developing governance by adopting efficient, modern horizontal management methods and encouraging the integration of regional viewpoints in the development of national policies.
- Targeted initiatives  
Provide leadership in the joint implementation of horizontal initiatives for designated client groups and areas.



## Basis

The working group in charge of defining a management and accountability framework (a modern comptrollership-related project) met on several occasions in fall 2002. Early on, the members agreed on a number of considerations that would direct their work:

- Their work would build on the foundation of the QFC's strategic planning process
- The development of performance indicators would be a significant component of the project
- The development of a logic model would make it possible to establish a shared vocabulary
- A variety of tools, including a management chart, would need to be developed to support the work of committee co-ordinators and communicate outputs

Besides approving the work carried out by the group, the QFC set an additional requirement: the project would have to make it possible to measure the costs of committee activities and the investments of federal institutions. It should be specified that only a portion of costs are officially recorded in financial systems. The other, more substantial portion is made up of unobvious costs arising from employee participation in interdepartmental activities. An estimate of these costs was made in the 2001–2002 fiscal year.

Appendix 3 provides an overview of the key components of the proposed management and accountability framework. From the outset, it should be made clear that the working group was involved in drafting the QFC's strategic plan for 2003–2004 and proposing a reduction in the number of activity areas, a logic model, and a series of indicators. Throughout 2003–2004, the indicators were to be tested by pilot committees and placed at the disposal of any other committee expressing an interest in doing likewise.

## Strategic plan

The QFC's strategic plan covers a three-year period, but is reviewed annually. Essentially, its purpose is to determine the directions and actions that will help make the QFC's mission and vision a reality.

The QFC's strategic planning process is divided into three main phases.

- Phase one  
An analysis of the environment is conducted to identify issues and opportunities for joint action while taking associated risks into account. The information examined includes the Clerk of the Privy Council's annual priorities, the Speech from the Throne, and major trends in public administration, the economy and society as a whole. The QFC's long-term directions and priorities are adjusted in this phase.

- Phase two  
The QFC determines its activity areas, long-term objectives, short-term expected outputs, committees in charge and key actions to be taken. Indicators are associated with the objectives and outputs to make them measurable and determine whether they have been reached.
- Phase three  
The third and final phase consists in communicating the strategic plan. This phase is important, as the committees and institutions need to have a clear understanding of the QFC's expectations if they are to work on components of the plan and incorporate their actions into a consistent whole.

### **Committee action plans**

Each committee develops an annual action plan in response to the QFC's strategic plan. Committees first determine what is expected of them and then specify the resources available to them and the activities they intend to carry out to meet the QFC's expectations. If necessary, they can join with other committees, who will act as partners.

The management and accountability framework and the management chart underpinning it carry with them a number of requirements with respect to drawing up action plans. Some degree of standardization is necessary. In the past, committees were free to employ the format of their choice.

### **Indicators**

Performance indicators quantify the outputs obtained and are an important link between the strategic plan and committee action plans (between what is planned and what is achieved).

### **Cost estimates**

A number of the QFC's co-ordination activities are funded by projects run by the central agencies, including the Treasury Board of Canada Secretariat. However, most costs are covered by the federal institutions. The management and accountability framework therefore has to meet a significant challenge: linking costs to outputs.

### **Management chart**

Communicating performance information is essential for reporting outputs and, eventually, making the necessary changes. Until now, annual reports were used to report outputs. However, the working group opted for a computerized communication tool because:

- Such a tool would make it possible to reach co-ordinators and committee members working in a variety of locations
- A number of options could be added (eg, publication of the QFC's strategic plan, committee action plans and follow-up reports)



## Information processing

The QFC Office planning officer and the committee co-ordinators are called upon to play a key role in processing information.

- Planning officer

Besides participating directly in preparing the strategic plan, this individual will be called upon to manage a range of information published in the management chart, such as data on the institutions, committees, objectives, outputs, indicators, etc

- Committee co-ordinators

Co-ordinators will use the management chart to record information on their group's action plans, follow-up and cost estimates.



## Chapter 3

# Profile of the QFC's Activity Areas

### Scope

There is no lack of opportunities to bring together federal partners for co-ordinated action. As proof of this, over 30 committees and regional round tables are carrying out a variety of activities in the Quebec Region. New opportunities for joint action present themselves every day. The work of a committee can also involve other groups and generate new initiatives, which increase the complexity of the QFC's activities.

The QFC's mission, directions and priorities ensure that committee activities are consistent. However, another unifying factor or common denominator was needed to better identify the rationale behind the numerous initiatives. The working group therefore selected the "activity area" as the common denominator. Activity areas can be used to group together expected outputs, performance information and planned activities.

For 2003–2004, the working group, in conjunction with the QFC Office, identified 13 activity areas (see Appendix 4). The activity areas are related to priorities and, consequently, can vary from year to year. However, since priorities are set for a minimum of three years, there should be some continuity in the selection of activity areas.

An activity area is an action that is deemed sufficiently important that an effort is made to solve problems, change situations or expedite matters relating to that action. The selection of objectives is closely associated with the choice of activity areas.

The selection of activity areas also promotes accountability. Generally speaking, responsibility for an activity area rests with a single committee. In Appendix 4, two areas are exceptions to the rule. The first, recognition, includes organizing National Public Service Week. Various organizing committees throughout Quebec are asked to plan events under the co-ordination of the QFC. Each committee is therefore responsible for its activities and has to report on them.

Learning and development is the second activity area for which more than one committee is responsible. The QFC strives to enhance government effectiveness in the regions and support the development of an interdepartmental learning culture. It therefore promotes the development and maintenance of networks and the organization of horizontal activities. All committees will therefore be expected to submit initiatives that meet those objectives.

## Rationale

The first step in developing a management and accountability framework for a program consists in establishing the reason for that program's existence. In the same way, we feel it is essential to provide a profile of each activity area before explaining the rationale behind it. A model has been created for that purpose (see Appendix 5). It goes without saying that profiles will need to be updated regularly to keep track of new concerns and new or discontinued activity areas. Appendix 6 shows the profile of the human resources planning activity area.



## Chapter 4 Logic Model

### Procedure

An activity area profile explains the reason for the activity area's existence, while a logic model connects the objectives, resources invested, activities provided and outputs pertaining to a given activity area. The development of a logic model, which is essentially a process or procedure to follow, is a key step that has to be taken before performance measures can be selected.

### Common terminology

When applied to horizontal activities, the logic model gains added significance from the fact that it enables committee members to adopt a shared vocabulary. Committee members come from a variety of institutions that adapt performance management-related terms and expressions for their own use. Within the federal government, it has been noted that the meanings of such words as *priority*, *objective*, *input*, *resource*, *effect* and *impact* vary according to the institution using them (see Appendix 7 for key definitions pertaining to the logic model).

A number of working group meetings focussed on developing the logic model. The group finally agreed on a standard formula that was later adopted by the QFC in its strategic planning for 2003–2004. The model generally employs the definitions set out in the Treasury Board of Canada Secretariat's Management Accountability Framework.

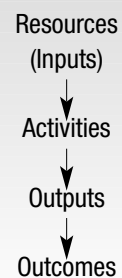
### For each activity area

Appendix 8 shows that a logic model has to apply to each activity area and illustrates how the various activity areas tangibly contribute to accomplishing the QFC's mission and directions. The desired changes are stated in the form of objectives, whose achievement follows the simplified logic model below. Resources (inputs) carry out activities that will translate into short-term outputs, which will lead to final outcomes.

The production process follows this logical progression. However, during planning, the order of the steps is reversed. It is easier to set objectives based on expected outputs, determine the activities to carry out, and then, lastly, specify the resources required.

An example can be found in Appendix 9, which shows how the logic model applies to the human resources planning activity area in the QFC's 2003–2004 strategic plan.

#### Simplified Logic Model



The logic model, when applied to an activity area, circumscribes the expected outputs and has a number of other uses. It serves as a starting point for risk management, assessments of the various activity areas, and the formulation of performance indicators.

Risk management is associated with a number of assumptions arising from the logic model. Appendix 9 shows a number of theories that have not necessarily been proved, including activities aimed at taking an inventory of interdepartmental human resources planning tools, training human resources staff, and identifying target recruitment sectors. Each statement entails the risk that it will not lead to the expected outcome (ie, contribute to establishing a sustainable work force to support the objectives of the institutions).

After a given period, the QFC will seek to determine whether its actions have yielded significant changes. This process will require a more comprehensive evaluation than the continuous evaluations carried out using performance indicators. It is essential here, as well, to go back to the logic model to answer the following questions: What were we trying to accomplish? Why?

The next chapter deals with the usefulness of the logic model in setting performance measures.

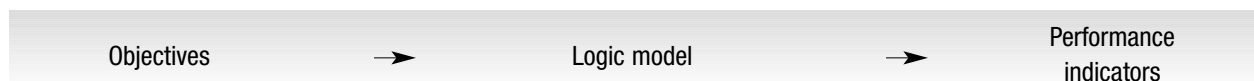


## Chapter 5 Continuous Performance Measurement

The profiles of activity areas explain the QFC's objectives and the rationale behind the activity approaches. The logic model describes the steps and sequences of events needed to achieve the objectives. Performance measures provide information enabling managers to:

- React and adjust activities when problems arise
- Be accountable for their actions and assigned responsibilities

The three components are closely linked, and the quality of each depends on that of the other two.



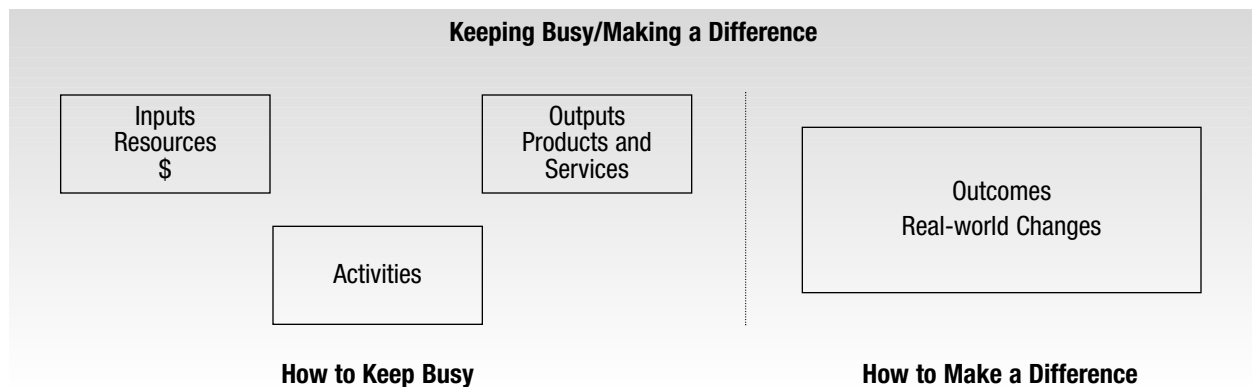
If the objectives are unclear, it will be difficult to determine what needs to be done to achieve them. If the steps and sequence of events related to what must be produced are not clearly formulated, it will be difficult to set performance indicators. Performance indicators are directly based on the logic model.

### Definitions

Results-based management places a great deal of emphasis on performance measurement. It is often said that modern managers can no longer settle for spending their allocated funds and carrying out activities. They also have to ensure that their actions benefit the public. In the past, this might have taken the form of seeing to it that the budgets had been fully distributed and that the majority of planned activities had been carried out. This is no longer the case. The simple cost and activity indicators of the past no longer meet modern-day requirements. Nowadays, it is necessary to go further and demonstrate how the activities in question have made a difference. This requires a wider range of indicators.

In his guide to performance measurement in the public sector<sup>1</sup>, Mark Schacter presents a diagram illustrating results-based management and its effect on indicators.

1. SCHACTER, Mark, *Practitioner's Guide to Measuring the Performance of Public Programs*.



An institution's performance is directly related to its outputs. Indicators are generally used to measure performance. When used over time, they provide information on the various aspects of outputs. Indicators must therefore distinguish things that are done to "keep busy" from those that really "make a difference."

In the QFC's situation, the activity areas are the equivalent of production lines. Performance measurements therefore have to provide information on the production processes employed in each activity area. They also have to point out the results that demonstrate that the QFC is making a difference.

It is important to note, however, that performance measures rely not only on indicators, but also on any other type of performance-related information. Performance measures have to be planned from the outset of an activity and subsequently used, on a continuous basis, for monitoring purposes.

Performance information is also used during the evaluation phase (see Chapter 7), which kicks in when the project reaches a key phase or is completed. This is what distinguishes evaluation from continuous performance measurement.

## **Different approaches**

Besides the above-mentioned definitions, a number of approaches can be used to select indicator categories. Below are three complementary approaches that emphasize the concerns inherent in developing indicators.

### *Based on responsibility level*

The first approach consists in categorizing the indicators based on the level of responsibility entrusted to the manager. Mark Schacter states that it is important to distinguish performance indicators within the manager's control from those outside of his or her control.

Indicators that are generally outside of the manager's control are related to final outcomes. In the example given in Appendix 9 (human resources planning activity area), the final goal is to create a sustainable work force that will support the objectives of the federal institutions. A number of factors besides the QFC's activities contribute to the achievement of this goal. The committee in charge of the activity area cannot therefore be held solely responsible for the final outcome. For that reason, Mark

Schacter's approach includes an initial category of indicators that take into account aspects for which the manager is responsible. A second category deals with factors for which the manager is not entirely responsible.

#### *Based on logic model components*

The second approach consists in defining indicators based on the components of the logic model. It therefore includes:

- Resource indicators (focussed primarily on costs)
- Activity indicators
- Output indicators
- Outcome indicators

#### *Based on perspectives*

The third and final approach is inspired by the management charts that arose from quality-based approaches. Essentially, this approach is a balanced combination of indicators that take into account:

- The user's viewpoint
- Financial aspects
- Business process aspects
- Aspects relating to the institution's learning and innovation

### **QFC performance indicators**

The approach selected by the working group is a variation on the last two options mentioned above. (The first approach was described because it emphasizes the importance of measuring results even when managers cannot control all factors.)

From the outset, it should be mentioned that the indicators proposed by the working group are simply a starting point and will be improved with time and experience. The development of activity areas should help to better define objectives. More precise objectives will subsequently make it easier to determine resources, activities, outputs and outcomes. Lastly, a seamless process will make it possible to fine-tune the performance measures.

The working group selected four categories of indicators:

- Activity indicators
- Cost indicators
- Satisfaction indicators
- Impact indicators



The working group began by selecting general indicators based on its understanding of the QFC's mission and activities. About 30 indicators were thus selected. Next, a subgroup applied each indicator to the objectives and expected outputs as stated in each activity area (2003–2004 strategic planning). Some indicators were then eliminated or modified, while others were added.

In Appendix 10, performance indicators are presented by category. The indicators established for each activity area are listed in Appendix 11.

Activity indicators can be associated with components of the logic model: the accomplishment of activities and action plans and the production of outputs. Cost indicators are based on resources (inputs). Impact indicators are primarily rates of product use, recommendation application and institution participation. Satisfaction indicators have no equivalent in the logic model, as they are more closely related to the user viewpoint in management charts. It was important to retain them, however, as the QFC and its committees already measure satisfaction among internal users.

During discussions about the logic model, it became clear that performance indicators were the best sources of information for both assessing the level of achievement of results and planning activities to be carried out. In the latter case, the indicators represent inputs. Take, for example, the satisfaction rate of committee co-ordinators with the QFC's planning process. This rate can be used to assess the level of satisfaction with the process and, at the same time, serve as a starting point for changes.

About 30 performance indicators were selected to support the QFC's strategic plan. They were divided into four categories that, for now, offer a sufficiently broad range of indicators for each activity area. Other indicators may be added, depending on needs and changes to the QFC's activities.

## Setting targets

Indicators are used to track how a situation changes with time. Given the QFC's changing environment, it is best to set a target for each indicator at the beginning of every year, when committee action plans are developed. Targets define expectations with respect to a given indicator and the rate to be achieved. Targets serve as reference points for measuring outputs.

Since this is a first for the committees, and given the importance of facilitating the setting of targets, it was recommended that the exercise be undertaken with common targets of:

- 85% for satisfaction indicators (eg, 85% of participants in a human resources planning training session should express satisfaction with the training)
- 70% for impact indicators that measure product usage rates (eg, 70% of institutions have used the directory of human resources planning tools)

Cost-related targets will be set progressively, as costs associated with QFC activities are unknown at the moment.

## **Responsibility for data collection**

The committees play an important role in achieving the QFC's priorities and objectives. Each committee has an official or unofficial co-ordinator whose role with respect to the QFC's strategic plan is to prepare the committee's action plan on an annual basis. It is therefore the co-ordinator's responsibility to:

- Submit the activities and indicators recommended by the QFC for the committee's approval
- Propose alternate indicators, if necessary

If new indicators are suggested, the co-ordinator discusses them with the QFC Office planning officer.

At the start of the year, it is the co-ordinator's responsibility to record in the management chart the components of the committee's action plan and the targets set. During the year, the co-ordinator records the results associated with the indicators and his or her analysis of the group's performance.

## **Frequency of data collection**

The management chart is a computer tool that makes it possible to record the outputs obtained during the year, as activities and action plans are carried out.

## **Data sources and collection methods**

See Appendix 11 for a detailed description of indicators and data sources. It is the responsibility of committee co-ordinators to select a data gathering method appropriate to each indicator. However, they may modify the tools to suit their purposes.



## Chapter 6 Financial Information

Financial information is usually not an issue for federal institutions, which generally use accounting systems to monitor their revenues, expenditures and assets. However, only a portion of the QFC's revenues and expenditures are accounted for, as most activities are funded by the institutions, and cash flow is not recorded.

The QFC's activities have broadened in recent years, yet the increase has not been quantified. Financial information on the cost of activities is therefore a key issue for the QFC and its supporting institutions. What is the cost of all the activities it oversees? Which institutions or committees are carrying out which activities? Is a given institution's level of investment in horizontal activities appropriate in light of its mission? What is the value of their investments versus their total budget? Is the cost of a given activity appropriate in light of the benefits derived from it? These are some of the questions to which financial information can provide the answers.

It should be noted that costs are estimated. Our purpose is not to institute an accounting system to track every dollar received or spent. Such a system would be far too costly.

What will be measured using costs? A working subgroup examined the issue and selected a procedure to follow. It determined that the following factors must be identified:

- Activity costs
- Costs of each committee's activities
- Funding sources (investments from institutions or special funds)
- Cost relative to each activity area and each priority in the strategic plan

Before proceeding any further, it should be noted that the financial information in question is not intended to replace the accounting activities of the QFC Office. Rather, its purpose is to provide additional information.

### **Activity categories**

To meet the needs listed above, the working group began by agreeing upon what constitutes a QFC-sponsored activity. The following definition was arrived at: QFC activities include action taken by committee members (employees of the federal institutions) to meet the objectives associated with its activity areas.

Three activity categories were identified:

- Meetings  
Regular committee meetings are included in this category. Monthly meetings of the Interdepartmental Committee of Human Resources Directors would thus constitute a meeting activity.
- Co-ordination  
This second activity category includes tasks carried out by committee co-ordinators or their assistants to ensure the smooth operation of the group or to build links between the various activity areas. Regular executive committee meetings would therefore constitute a co-ordination activity.
- Initiatives  
This third category includes initiatives that, in a general way, are sufficiently broad in scope to be considered distinct. For example, organizing National Public Service Week and the Middle Managers' Network's mentoring program would constitute initiatives.

Over the course of a year, each committee carries out at least one meeting activity. Some committees may also carry out co-ordination activities and one or more initiatives.

## Cost categories

The cost of an activity is the value, in dollars, of carrying out the activity. It can be prorated according to the nature of the costs. For the QFC, these are essentially salary and non-salary costs.

It is also possible to prorate costs by distinguishing “financial cost” from other costs categorized as “non-financial”. This method would be extremely useful to the QFC, as it would make it possible to identify the investments granted by the federal institutions.

- Monetary cost  
The monetary cost is the amount of money required to carry out an activity. This is the amount allocated to the committee to carry out the activity, and it comes from membership fees or from the institutions that fund the activity. The Treasury Board of Canada Secretariat is the key institution that allocates funds, through various programs, to finance the activities of the regional federal councils.
- Non-monetary cost  
The non-monetary cost is the value, in dollars, of the activities carried out by the federal institutions, in addition to the monetary cost. No funds are received or paid here; this is an estimate of the costs associated with the voluntary participation of federal institution employees in a given activity.

## Cost estimate method

There are four steps in the cost estimate method. This process takes into account the time constraints faced by committee co-ordinators, who are solely involved in the first step, which involves communicating basic information on activities. The other steps are automatically calculated by the management chart described in Chapter 8.

### *Step 1 — Entering information on activities*

Committee co-ordinators define the activities for which their groups are responsible. They then enter data for each activity into the management chart (see Appendix 12, lines 1 to 8):

- Data attributable to each participating institution (number of members belonging to each institution and financial contribution)
- Data required to calculate the total cost of the activity (member's average number of days of participation, members' attendance rate, members' payroll expenses, travel costs, other non-salary expenditures, and registration fees).

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#### **Example**

The Quebec Federal Council on Information Technology meets six times a year for half a day. Twenty-five members from 20 institutions sit on the committee. During the year, members' attendance rate was 80%. Payroll expenditures for the 25 members are estimated at \$1,500,000. The committee incurred travel costs of \$2,000 and other costs of \$2,000, and received a \$3,000 contribution from the Treasury Board of Canada Secretariat. It collected \$4,000 in registration fees for a meeting open to all information technology specialists.

The only problems the committee co-ordinator might have would be related to calculating the payroll costs for the 25 members, their participation rate, and their average number of days of participation. All other information is raw data that the co-ordinator has to record in the management chart.

### *Step 2 — Estimating activity costs*

The management chart automatically performs an initial calculation to determine the total cost of each activity (see Appendix 12, line 27). The cost of an activity is determined by adding salary and non-salary costs. As this is an estimated cost, a number of assumptions are made:

- The total of members' salaries is enough information to estimate payroll costs
- An attendance rate for committee members is calculated, as they are not always able to attend meetings
- An employee's benefits represent an average of 20% of his or her salary
- The actual number of days worked by an employee is 220 per year
- Real property services are equal to 13% of an employee's salary and, in most institutions, these services are covered by Public Works and Government Services Canada
- Administrative services (finance, information technology, human resources) are equal to 11% of an employee's salary

From there, the total cost of a QFC committee's activities can be calculated by adding up the costs of the various activities under its responsibility.

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#### **Example**

In the previous example, the activity would have required 60 days of work. At an adjusted salary of \$360 per day, the salary cost would be \$21,600. When non-salary costs of \$9,184 are added, the total cost of the activity becomes \$30,784.

### *Step 3 — Distributing activity costs among institutions*

Step three is to distribute the cost of the activity among participating institutions (institutions to which committee members belong). The financial contributions of the institutions are already known, as the group's co-ordinator provided that information in step 1.

- The financial contributions of the institutions are subtracted from the cost of the activity (see Appendix 12, line 30)
- The non-monetary cost thus obtained is prorated based on the number of representatives from each institution who spent time on the activity (line 40).

It should be noted that participants in a given activity can be charged registration fees. This is considered self-funding, and the registration fees will be deducted from the cost of the activity before the non-monetary cost is allocated.

#### **Example**

To illustrate step 3, let us examine the following question: What portion of the cost of the above-mentioned activity (\$30,784) is attributable to each institution? The Treasury Board of Canada Secretariat's financial contribution of \$3,000 is subtracted from the cost of the activity. The same goes for the registration fees of \$4,000. The remaining amount, \$23,784, is the institutions' non-financial contribution. This amount will be allocated equally among the 25 members from 20 institutions, ie, \$951 per member.

### *Step 4 — Activity costs to institutions*

Step four is to consolidate the financial and non-financial costs to institutions.

- The financial cost attributed to an institution is equal to all the monetary contributions paid for one or more activities.
- The non-financial cost attributed to an institution is the sum of the non-financial costs.
- The total cost attributed to all the institutions, when added to the registration fees, should equal the total cost of the activities.

The method employed also makes it possible to prorate the costs to institutions between salary and non-salary costs. It also determines the costs associated with the activity areas and priorities. However, if an activity covers several activity areas, the cost of the activity will be directly attributed to the umbrella priority.

#### **Example**

The Interdepartmental Committee of Human Resources Directors is responsible for more than one activity area. The committee meeting activity is therefore directly associated with the human resources priority.

## **Data entry instructions**

These instructions are intended for committee co-ordinators. They complement the information provided above, in step 1 (entering activity data) and the sample worksheet filled out in Appendix 13. These instructions should also be used in conjunction with management chart cost estimate entry screens.

#### *Number of members (line 1)*

The number of members is reported for each institution with a representative who took part in the activity. Members who do not attend meetings are eliminated. The total number of members from different institutions is equal to the number of members who took part in the activity. In our example, the committee has 25 members.

#### *Member's average number of days of participation (line 2)*

Committees hold half-day meetings every two months. Members therefore spend an average of three days per year taking part in meetings.

#### *Members' attendance rate (line 3)*

A committee has 25 members. If, on average, twenty people attend meetings, the attendance rate is 80%.

#### *Members' total payroll (line 4)*

Members' total payroll is the total amount of their annual salaries. In our example, the annual payroll for members is \$1,500,000.

#### *Travel costs (line 5)*

To ensure that travel costs are distributed equally among institutions with one or more representatives on a committee, the total estimated amount must be entered in this field. It is important to avoid entering it again under "financial contributions". In our example, travel costs amount to \$2,000.

#### *Other costs (line 6)*

The same principle as for travel costs applies here. To ensure that other costs are distributed equally among the institutions based on their number of representatives on a given committee, the total amount must be entered in this field. Here again, it is important to avoid entering the amount a second time under "financial contributions". Costs associated with services (real property, administrative, finance, information technology, human resources) must not be entered here. They will be calculated automatically based on a number of assumptions. In our example, other costs amount to \$2,000.

#### *Financial contributions received (line 7)*

Financial contributions are amounts of money paid by the central agencies or other institutions to cover costs associated with an activity (eg, the Treasury Board of Canada Secretariat contributes \$3,000 to support a human resources modernization activity). When it is clear that the costs associated with an activity were covered by the institutions, they can be entered here. However, they should not be entered again under "Travel costs" or "Other costs".

Financial contributions include dues paid for a specific activity. Dues paid to the QFC by the institutions (membership fees) should be recorded by the QFC Office for one of the activities associated with the horizontal governance priority.

#### *Registration fees (line 8)*

Some committees require those taking part in a given activity to pay registration fees. Such costs must be entered in this field. In our example, registration fees amount to \$4,000.

## Cost entry responsibility

Committee co-ordinators are responsible for:

- Listing the activities carried out by their groups based on the strategic plan and in accordance with the activity categories listed under “Cost estimates”
- Throughout the year, keeping required information to enter data on each activity when appropriate

At the beginning of the year, it is recommended that activities be planned for which costs must be indicated. The management chart includes two screens for estimating costs:

- A screen for entering data by institution
- A second screen for entering overall data on the activity

### Data to be collected throughout the year for each activity

- List of participating institutions and their respective number of members
- Member attendance rate for each work session
- Travel costs
- Other costs (with the exception of travel costs and real property, administrative, information technology and human resources services)
- Financial contributions from each institution (including dues for specific activities)
- Membership fees for each institution
- Total registration fees collected

## Data collection frequency

Activity cost estimates cover one fiscal year (April 1 to March 31). Theoretically, activity data would be entered no later than March 31. However, if an activity is completed before the end of the year, the coordinator may immediately enter the relevant information.





## Chapter 7 Evaluation

The ultimate purpose of evaluation and continuous performance measurement is to measure outputs (Chapter 5). However, they differ in three ways.

- **Timeframe**  
Performance indicators used for continuous measurement are entered every year. Results evaluation, however, is conducted over the longer term.
- **Aspects measured**  
Indicators are more readily used to measure resources (inputs), activities and outputs. Evaluation focusses on measuring intermediate or final outcomes, ie, the end result of activities.
- **Subject**  
First and foremost, evaluation consists in determining the relevance, success and cost-effectiveness of an activity.

QFC activities can be subject to two types of evaluations:

- Evaluations required following the allocation of a budget by a central agency for a specific project
- Evaluations required for sound results-based management

The Treasury Board of Canada Secretariat is the primary institution that allocates funds to the QFC for projects. Generally, the allocation of these budgets is conditional upon the production of progress reports, which can take a number of forms and focus on activities and the use of funds or on relevance, success and cost-effectiveness.

Evaluations required for sound results-based management are generally more informal and intuitive. It is the responsibility of the QFC to determine what form the evaluation may take in the future. The QFC can draw up a series of questions to assess each of the activity areas in its strategic plan (see Appendix 14). These questions generally appear complex. However, the QFC has to answer them if it is to exercise results-based management. Estimating the costs of the various activity areas (Chapter 6) and performance indicators (Chapter 5) should provide valuable information.

The QFC can carry out self-evaluations or conduct more formal evaluations. The QFC decides on the method and frequency to be used.



This chapter gives a brief description of the management chart. This computer application was developed to communicate performance results and report on activities. Data collection will be in vain unless there is a way to communicate the information gathered.

A management chart is a statement that presents the various indicators pertaining to an institution. However, the computer tool developed is more than that, despite its name, which was maintained only to remain faithful to the initial idea. The application will subsequently be presented in more detail and the various screens will be used to train key users (see Appendix 15).

At the outset, the management chart was intended to focus on selected performance indicators. However, the working group opted for a computer tool that would incorporate all information documents on the QFC and its committees, as well as their performance, for two main reasons:

- There is a close link between indicators, the QFC's strategic plan and the action plans of committees
- The QFC has no management information system to collect and communicate cost data

Aside from the data on indicators usually included in a management chart, users can also access information on costs and view the QFC's mission, directions and strategic plan, as well as committee action plans. Links lead to the annual report, activity area profiles and the index of best practices.

The QFC Office planning officer and committee co-ordinators will play a key role in updating the tool.

- QFC Office planning officer  
Using data entry screens, this individual can update the strategic plan and, as required, change data on activity areas, objectives, outputs, committees and participating institutions
- Committee co-ordinators  
Co-ordinators will record their group's action plan, the outputs obtained during the year, and the information required for cost estimates

### Contents of the Management Chart

QFC mission, vision and directions

QFC strategic plan

Committee action plans

Performance indicators by:

- Priority
- Activity area
- Expected outputs
- Committee

Cost information by:

- Priority
- Activity area
- Activity
- Committee
- Institution

Links with QFC information documents:

- Annual reports
- Profiles of activity areas
- Evaluation reports
- Index of best practices

## **Characteristics of the Management Chart**

### **Communication**

The primary purpose of the management chart is to communicate the results of QFC activities.

### **Management**

The various pieces of information presented are all oriented toward a central goal: carrying out the QFC's strategic plan.

### **Dynamic operation**

The tool includes a database accessible from the Web, which can be accessed and updated instantly.

### **Flexibility**

Most of the tool's components can be changed without the help of the system administrator. The QFC officer can thus modify the activity areas, mission statement, outputs, indicators, etc.

### **Integration**

The system presents all the information required for activity management.

### **Versatility**

The tool makes it possible to enter various pieces of information and view brief or detailed results reports.

### **Development**

Other modules can be added to the tool. To avoid holding back system development, a number of aspects were intentionally postponed, including:

- Risk indicators
- Management reports used for analysis
- Tables and diagrams comparing outcomes over a number of years
- Information source reliability indicators for aggregated results

Lastly, it should be mentioned that the creation of this type of application involves a number of challenges, and choices had to be made.

- Internet  
Federal employees are scattered throughout Quebec. It was therefore important to find a way to make the application accessible to everyone in real time.
- Hosting  
The application will be hosted by an outside provider. Hosting by a federal institution posed problems related to security, cost and compatibility with respect to supporting an interactive database.
- Development  
Development of the management chart was entrusted to the Canada Customs and Revenue Agency, which has a great deal of expertise in the field. The institution is a QFC member and has shown a great deal of interest in taking part in and monitoring the project.



## Chapter 9

# Lessons Learned and Benefits

Throughout this report, we have attempted to set out the various viewpoints of working group members and everyone else who took part in the project. However, we also felt it would be important to give a more general overview of the lessons learned.

A number of factors contributed to making the project a success.

- Diversity of expertise and communities  
The diverse nature of the expertise and the communities to which the members of the working group belong was clearly advantageous to the project. The group comprised public servants representing 10 federal institutions and several members of the QFC Office. The body of knowledge brought to the project by these public servants included expertise in such areas as assessment, strategic planning, performance measurement, management tools development, cost estimation and management of federal programs and services. Staff from the QFC Office have similar experience, as well as extensive knowledge of the QFC's activities. The diversity of viewpoints helped generate some highly useful and productive discussions.
- Established process  
The development of the management and accountability framework was firmly rooted in the QFC's existing strategic planning process. Our commitment to improving this process allowed us to change certain operating methods right from the beginning of the project.
- Designated activity areas  
The need to give priority to certain activity areas led to fruitful debate. In 2002–2003, the QFC identified 45 priority activity areas. These activity areas were narrowed down to 13 in 2003–2004 and 9 in 2004–2005. This brought focus to the project, helping us to avoid falling into a scattered approach to our activities, as QFC members often feared might be the case.
- Innovation  
The development of management and accountability frameworks for horizontal initiatives is a relatively new practice. The Treasury Board of Canada Secretariat has already addressed the issue, but this project is nonetheless an innovative and experimental one, as it ties in with interdepartmental management in the regions. It will therefore yield a number of valuable lessons on what action to take and not to take.
- Support from National Headquarters  
The Treasury Board of Canada Secretariat provided support on three fronts. First, it supplied funding, without which the project would not have been possible. Second, its representatives offered advice and support services, even taking part in most of the working group's meetings. Third, the Treasury Board helped promote the project to federal councils in other regions.

- Participation of one selected federal institution  
Thanks to the participation of the Canada Customs and Revenue Agency (CCRA), we were able to cultivate federal expertise in the development of management charts. This factor was key to the project's continuity. The CCRA's co-operation also showed that it was possible to develop an electronic tool through collaborative telework: the designers worked out of offices in Shawinigan, while all of the working group's meetings were held in Montreal.
- Availability  
The availability of pilot committee co-ordinators allowed us to test out some options and assess the project's overall feasibility. Although already heavily burdened with their regular duties, they nevertheless patiently took part in development sessions despite the at times uncertain outcomes facing them.
- Federal councils  
The project was undertaken with a view to eventually applying it to other federal councils. It would therefore have been useful to have representatives of other federal councils in the working group to help guide our work.

The following factors created difficulties.

- Attendance  
The irregular attendance of working group members slowed the pace of our work somewhat. Aspects already discussed or approved often had to be re-explained to people who had missed previous meetings. Attendance rarely topped 50%, and some participants never actually attended any meetings at all.
- Staff turnover  
Staff turnover in the QFC hampered the continuity and flow of discussions and the process for developing the framework. We could have obtained results more quickly if the same people had remained in the working group. Between the time it began and when it ended, the project was overseen by a succession of three QFC Chairs, two Executive Directors, two Associate Directors and three Policy Committee Co-ordinators.
- Meetings  
We could have increased productivity if we had been more rigorous in setting our agendas and facilitating the meetings.

On the whole, the relevance of a tool as highly developed as the management chart is still unclear. The chart is a costly tool that required a major investment of time and effort. To ensure continuity, further minor investments will be needed. In our opinion, if the QFC remains the sole user of this tool, further investment will be difficult to justify. However, if the management chart comes to be used by other federal councils in other regions and by other federal institutions, our chosen approach may be vindicated.



## Conclusion

The basis for the results-based management and accountability framework was twofold:

- The QFC's charter, which includes the mission statement and terms of reference
- The multi-year strategic plan developed by the QFC

The working group proposed that the QFC use a number of types of information to enable it to better manage its horizontal activities. The group also made possible the design of tools such as the management chart. However, the information and tools in question were only a starting point for results-based management. QFC members, committee co-ordinators and QFC Office officers will have to adopt them and change them based on their requirements and, above all, outputs.

In time, activity areas will be discarded in favour of other, more accurate, indicators that better measure activities and outputs. It is therefore important that there be synergy between the various players, each of whom will have to demonstrate that their actions caused the change and made a difference.

In Chapter 8, we mentioned that the management chart is an upgradeable tool. A number of its areas were purposely left undefined to avoid delaying the development of the project (areas include developing risk indicators and reliability indexes for sources of information for aggregate results). A number of aspects of the management framework were also not fully explored, such as the evaluation phase and lessons to be learned from QFC best management practices.

- Evaluation  
The proposed continuous horizontal activity performance indicators have definite limitations. They cannot reflect the impact that regional federal councils have had and will have in future. Closer analysis will be required to demonstrate the relevance of some horizontal activities.
- Lessons learned  
The Auditor General of Canada<sup>1</sup> stated that to benefit fully from results-based management, it was necessary to use information relating to best practices. The regional federal councils have been in operation for more than 20 years and have evolved to the point where their presence is felt in a number of activity areas. The involvement of large numbers of employees and the interest shown by the central agencies in consulting them can only be explained by their success. However, since their successes have never truly been recorded, it is difficult to track them properly.

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1. Report of the Auditor General of Canada, December 2000, Chapter 20 (Managing Departments for Results and Managing Horizontal Issues for Results).

# Appendix







## Appendix 1 Institutions

In the QFC environment, institutions are divided into four categories: member institutions, non-member institutions, central agencies and other institutions.

- Member institutions  
The QFC brings together the top ranking officials of some 30 federal institutions in Quebec.
- Non-member institutions  
Federal institutions that are not part of the preceding category are considered non-members. Nonetheless, some such institutions take part in QFC committee activities.
- Central agencies  
Because of their mission, it is in the interests of the central agencies to support the QFC. These federal institutions are generally based in the National Capital Region. The Treasury Board of Canada Secretariat and the Privy Council Office are central agencies (both of which have appointed liaison members to the QFC).
- Other institutions  
This group is composed of institutions or organizations that are unrelated to the federal government. However, they support the QFC's activities as partners.

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### Member Institutions

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Agriculture and Agri-Food Canada	Industry Canada
Canada Customs and Revenue Agency <sup>1</sup>	Justice Canada
Canada Economic Development	National Defence
Canadian Environmental Assessment Agency	National Parole Board
Canadian Food Inspection Agency	Natural Resources Canada
Canadian Heritage	Office of Critical Infrastructure Protection and Emergency Preparedness
Canadian Human Rights Commission	Office of the Commissioner of Official Languages
Canadian Security Intelligence Service	Parck Canada Agency
Canadian Space Agency	Passport Office <sup>1</sup>
Citizenship and Immigration Canada	Public Service Commission of Canada
Communication Canada <sup>1</sup>	Public Works and Government Services Canada
Correctional Service Canada	Royal Canadian Mounted Police
Environment Canada	Statistics Canada
Fisheries and Oceans Canada	Status of Women Canada
Health Canada	Transport Canada
Human Resources Development Canada <sup>1</sup>	Veterans Affairs Canada
Immigration and Refugee Board	
Indian and Northern Affairs Canada	

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**Non-Member Institutions**

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Air Canada  
Business Development Bank of Canada  
Canada Post  
Canadian Broadcasting Corporation  
Canadian Mortgage and Housing Corporation  
Canadian Nuclear Safety Commission  
Department of Foreign Affairs and International Trade  
Info Entrepreneurs  
National Archives of Canada  
National Film Board of Canada<sup>1</sup>  
National Research Council Canada  
Old Port of Montréal Corporation  
Solicitor General of Canada  
Via Rail Canada

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**Central Agencies**

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Canadian Centre for Management Development  
Human Resources Community Secretariat (Treasury Board of Canada Secretariat)  
Privy Council Office  
Treasury Board of Canada Secretariat

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**Other Institutions**

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Aboriginal Business Canada  
Professional Institute of the Public Service of Canada  
Public Service Alliance of Canada

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1. These organizations cover their own real property services costs.



## Appendix 2

# Quebec Federal Council Committees

Twenty-one interdepartmental committees directly and indirectly support the QFC's directions and priorities. These groups of public servants share common interests and goals and support the development of their members by meeting their learning needs, sharing information during regular meetings and creating networking opportunities. They also provide tangible support for federal institutions by promoting the sharing of best practices and the carrying out of interdepartmental projects. Each committee includes a QFC member (sponsor) who takes an active part in committee activities. Committees prepare action plans and reports annually.

The QFC, the QFC Executive Committee and the QFC Office play a key role in co-ordinating interdepartmental activities.

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### Committees

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Communications Co-ordination Committee  
Diversity Action Group  
Federal Interdepartmental Group on Sustainable Development  
Federal Interdepartmental Round Table on Aboriginal Issues  
Federal Interdepartmental Security Committee  
Forum for Heads of Library and Documentation Centres  
Interdepartmental Committee of Human Resources Directors  
Interdepartmental Committee on Intergovernmental Issues  
Interdepartmental Network of Financial Advisors in Quebec  
Joint Career Transition Committee  
Material Management Managers' Network  
Middle Managers' Network  
Official Languages Committee  
Policy Committee  
Quebec Federal Council on Information Technology  
Quebec Federal Public Servants' Youth Network  
Recognition Committee  
Regional Executive Group for Emergencies  
Regional Round Table of Economists  
Science and Technology Committee  
Service Delivery Committee

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The regional round tables practice horizontal management depending on the context in which they operate and their own concerns. These interdepartmental groups contribute to the development of their regions.

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**Council Regional Round Tables**

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Abitibi Regional Round Table

Central Quebec Regional Round Table

Eastern Townships Regional Round Table

Gaspé-Magdalen Islands Regional Round Table

Laval-Laurentides-Lanaudière Regional Round Table

Lower St Lawrence Regional Round Table

Mauricie Regional Round Table

Outaouais Regional Round Table

Quebec City Regional Round Table

Saguenay-Lac-Saint-Jean Regional Round Table

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Appendix 3

# Overview of the Management and Accountability Framework (2003–2004)

<p>CFQ Vision  Mission</p>	<p>The QFC is composed of the top-ranking officials of some 30 federal institutions, who come together to exchange ideas, share information and agree upon means of action. Looking at the long term, QFC expects to be recognized as a dynamic and influential model of horizontal governance. With its partners, it provides collective leadership in order to mobilize resources and achieve its mission.</p> <p>The QFC is a network of mutual co-operation, support and joint action for resource mobilization to better serve citizens, foster sound management and promote federal endeavours.</p>						
<p>Priorities 2003–2006</p>	<p style="text-align: center;"><b>HUMAN RESOURCES</b></p> <p><i>As an employer of choice and learning organization, ensure employee recruitment, retention, development and well-being in an inclusive public service.</i></p>						
<p>Activity areas</p>	<p>Human Resources Planning</p>	<p>Official Languages in the Workplace</p>	<p>Recognition</p>	<p>Public Service Employee Survey</p>	<p>Learning and Development</p>	<p>Diversity</p>	<p>Modernization</p>
<p>Objectives (long-term)</p>	<p>Develop interdepartmental human resources planning capacity</p>	<p>Help create a work environment favourable to the use of both official languages</p>	<p>Recognize the work of public servants and their contribution to the public's quality of life</p>	<p>Help improve quality of life in the workplace</p>	<p>Increase government efficiency in the regions Develop an interdepartmental learning culture Enhance interdepartmental mobility</p>	<p>Help create a diversified public service that reflects Canadian society Help to eliminate discrimination, prejudice, stereotypes and cultural misunderstanding</p>	<p>Adapt to the requirements arising from human resources modernization</p>

(Continued on next page)

Outputs (Short-term)	Recommendations on ways to better prepare human resources Training in human resources planning Interdepartmental human resources planning	Distribution of best practices pertaining to official languages in the workplace	Recognition of employees who contribute to exceptional interdepartmental activities Recognition of all public servants	Recommendations on interdepartmental activities to undertake, in accordance with QFC priorities, to follow up on the survey	Network maintenance and development Special interdepartmental events (seminars, forums) Interdepartmental workshops and information sessions Interdepartmental continuous learning measures for managers Increased use of the Career Opportunities System Promotion of candidates who successfully complete the Career Assignment Program	Implementation of measures to eliminate obstacles that might jeopardize the careers of individuals with differences Distribution of best practices for welcoming and retaining members of minority groups Recruitment of members of visible minority groups during external recruitment (50% target)	Recommendations on action to be taken Development of competencies among human resources management staff, middle managers and employees in the compensation sector Recommendations on training in response to opportunities that arise through the modernization of human resources management
Continuous performance measurement	See Appendix 10 for performance indicators.						
Responsibility of	Interdepartmental Committee of Human Resources Directors	Official Languages Committee	Recognition Committee QFC Office	Interdepartmental Committee of Human Resources Directors	All committees	Diversity Action Group	Interdepartmental Committee of Human Resources Directors
Budget activities							
Risk Management							
QFC Administration—Modern Comptrollership							
(Continued on next page)							

Priorities fro 2003–2006	SERVICE DELIVERY <i>As a mutual-assistance, support and joint-action network, improve the delivery of our services to better serve the public.</i>		HORIZONTAL GOVERNANCE <i>Contribute to the development of governance by adopting efficient and modern horizontal management approaches and by promoting the inclusion of regional perspectives in the development of national policies.</i>		TARGETED INITIATIVES <i>Provide leadership in the joint implementation of horizontal initiatives for targeted client groups and areas: Aboriginal peoples and sustainable development.</i>	
Activity areas	Service Quality	Communication, Programs and Services	Federal Council's Capacity	Strategic Advice	Aboriginal People	Sustainable Development
Objectives (long-term)	Enhance service quality	Increase consistency in promoting Government of Canada programs and services	Development of governance through effective horizontal management methods	Develop sound strategic analysis capacity and a common vision Exercise increased influence over the development of national policies	Enhance the effectiveness of federal action on Aboriginal issues	Increase co-operation between the federal and Quebec governments with respect to sustainable development
Outputs (short-term)	Sharing of best practices relating to the Government On-Line program Recommendations on ways to measure service quality Recommendations on best practices with respect to client service Support for the Youth Café Increased use of the voice mailbox protocol Sharing of best practices with respect to call centre management	Joint participation in federal government trade fairs and shows	In-depth knowledge of major trends in Quebec Improved management of interdepartmental information More information on the results of interdepartmental activities Accountability framework in place for the three pilot projects Accountability framework in place for the QFC Heightened relations between the Privy Council Office (PCO) and the QFC Recommendations on the effectiveness of the structure of the QFC Office	Discussion of federal-provincial relations Collective action on major issues Follow-up on effects of the transformation Regional stands on: · The strategy on urban issues · Resource reallocation · Electronic government Follow-up and strategic advice, as needed, on: · Co-ordinating federal activities in the regions · The initiative on partnership with the volunteer sector · The strategy on innovation and competencies	Better knowledge and understanding of the situation, culture and issues of Aboriginal people within the federal public service Improved quality of life and living conditions for Atikamekw people Simplification of the contractual relationship between federal institutions and the First Nations Better knowledge of the problems faced by Aboriginal people in urban areas to implement coordinated strategies and meet their needs	Co-operation by federal institutions with respect to sustainable operations Improvements to the environmental assessment process Assistance for regional industry Solutions to climate change Sustainable development of communities Partnerships

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Continuous performance measurement	See Appendix 10 for performance indicators					
Responsibility of	Service Delivery Committee	Communications Co-ordination Committee	Federal Council	Policy Committee	Federal Interdepartmental Round Table on Aboriginal Issues	Interdepartmental Group on Sustainable Development
Budget activities						
Risk Management						
QFC Administration—Modern Comptrollership						





Appendix 4

# Activity Areas and Committees in Charge (2003–2004)

<b>Priorities</b>	<b>Activity Areas</b>	<b>Committees in charge</b>
Human resources	Human resources planning	– Interdepartmental Committee of Human Resources Directors
	Official languages	– Official Languages Committee
	Recognition	– Recognition Committee – QFC Office
	Public Service Employee Survey	– Interdepartmental Committee of Human Resources Directors
	Learning and development	– All committees
	Diversity	– Diversity Action Group
	Human resources modernization	– Interdepartmental Committee of Human Resources Directors
Service delivery	Service quality	– Service Delivery Committee
	Communications	– Communications Co-ordination Committee
Horizontal governance	QFC capacities	– QFC Office
	Strategic advice	– Policy Committee
Targeted initiatives	Aboriginal people	– Federal Interdepartmental Round Table on Aboriginal Issues
	Sustainable development	– Federal Interdepartmental Group on Sustainable Development



Appendix 5  
Sample Activity Area Profile

<b>Definition and purposes of the activity area</b>	Identify the purpose of the activity area and the requirements to be met within the federal government
<b>Key issues</b>	Determine the current key issues facing the federal government and the institutions
<b>Responsibilities of federal institutions</b>	Distribute roles and deliverables among the institutions and central agencies
<b>QFC initiatives</b>	Present the key initiatives to be undertaken by the QFC and its committees
<b>Governance structure of the committee in charge</b>	Give the name of the committee in charge, the subcommittees, if any, and possible partners
<b>References</b>	Draw up a list of key documents explaining the federal government's position on the activity area



# Profile of the Human Resources Planning Activity Area

## Definition and objectives of human resources planning

Human resources planning (HRP) consists in forecasting future work force needs (qualitative and quantitative projections) and adopting strategies that are appropriate to an organization's objectives. The main goal of HRP is maintaining a sustainable work force to ensure the continued viability of the organization. HRP can be useful for the following:

- Reducing the time and cost of recruitment and staffing
- Identifying opportunities for co-operation in recruitment and staffing
- Promoting the achievement of Employment Equity objectives
- Identifying official languages needs
- Anticipating work force adjustment needs

## Main issues in human resources planning

Work force renewal in the federal Public Service will be a major issue in coming years.

**Breakdown of Federal Public Service Employees by Age – Quebec Region  
(in percentage)**

Age category	20–39 years	40–54 years	55 years and over
March 31, 1993	50.4	43.5	6.1
March 31, 1998	36.6	58.1	5.3
March 31, 2003	29.6	61.0	9.4

Source : Treasury Board of Canada Secretariat.

The age profile of federal public servants in Quebec has changed considerably. Between 1993 and 2003, the proportion of public servants under 40 fell from 50.4% to 29.6%. On March 31, 2003, 61% of public servants in the Quebec Region were in the 40–54 years category, whereas this group represented only 43.5% of the federal government's work force in 1993. The increase in the proportion of public servants falling into this age group foretells a coming wave of retirements. In the next 10 years, 44% of all public servants working in permanent positions will become eligible for retirement.

Work force renewal will also have to take into account the government's Employment Equity objectives. Currently, disabled persons and members of visible minority groups are underrepresented in the federal Public Service in Quebec.

## Responsibilities of federal institutions in relation to human resources planning

Federal institutions are each responsible for their own human resources planning. For its part, the Treasury Board of Canada Secretariat sets the framework for human resources management and, consequently, the main aspects of its expectations for human resources planning. The Public Service Commission of Canada provides institutions with analyses that are relevant to them and trains their staff to assess and forecast personnel needs.

## Main QFC initiatives

Since 1999, renewal of the Public Service has been on the agenda of many federal institutions. In 2003–2004, for the second year in a row, the QFC gave the Interdepartmental Committee of Human Resources Directors a mandate to address this issue. The objective was to develop a capability for interdepartmental human resources planning at the regional level. The Committee is composed of human resources directors from 35 federal institutions, and its mandate is as follows:

- Develop an approach for improving how we prepare human resources professionals for their planning role
- Take an inventory of training and human resources planning tools and training courses in this area
- Pool future personnel needs to target occupations that will require recruitment

## References

- *Human Resources Management Framework* (Treasury Board of Canada Secretariat)  
The Framework is a compilation of human resources management practices that have a positive impact on business performance generally, as well as those practices that are unique to the Public Service.  
[http://www.tbs-sct.gc.ca/hr-rh/hrtr-or/Framework/hrmfrtm-cgrhorg1\\_e.asp](http://www.tbs-sct.gc.ca/hr-rh/hrtr-or/Framework/hrmfrtm-cgrhorg1_e.asp)
- *Developing a Staffing Strategy* (Public Service Commission of Canada)  
The first section of the guide, “Developing a Human Resources Plan”, gives the reasons why it is desirable to prepare a human resources plan and lists the main elements of such a plan.  
[http://www.psc-cfp.gc.ca/staf\\_dot/staf\\_strat/section\\_1\\_e.htm](http://www.psc-cfp.gc.ca/staf_dot/staf_strat/section_1_e.htm)
- *Federal Public Service in Quebec: Demographics and Employment Equity* (Public Service Commission of Canada)  
This document is a demographic and Employment Equity analysis. It also compares regional and national trends.  
[http://www.psc-cfp.gc.ca/research/demographics/regions/qc\\_e.htm](http://www.psc-cfp.gc.ca/research/demographics/regions/qc_e.htm)
- *The Road Ahead: Recruitment and Retention Challenges for the Public Service* (Public Service Commission of Canada)  
This special report sets out the challenges related to recruiting and retaining public servants. It gives a detailed description of current and future obstacles that hinder the Public Service’s efforts to attract and keep qualified staff.  
[http://www.psc-cfp.gc.ca/centres/reports-rapports/ra-vf/introduction\\_e.htm](http://www.psc-cfp.gc.ca/centres/reports-rapports/ra-vf/introduction_e.htm)



## Appendix 7 Key Definitions

<b>Logic model</b>	An illustration of how resources and activities combine to produce the outputs for an activity area.
<b>Objective</b>	Statement of long-term expectations that will guide efforts to meet priorities. (The statement of an objective also designates the long-term expected outcome. The Treasury Board of Canada Secretariat also uses the term <i>Strategic Outcome</i> .)
<b>Output</b>	A statement of immediate expectations that will guide efforts to meet objectives.
<b>Action plan</b>	Action plan implemented by the committees in support of the QFC's strategic plan.
<b>Activities</b>	Statements designating the actions intended to produce expected outputs. (The QFC uses this term as a basic unit in measuring costs.)
<b>Resources</b>	Inputs used to carry out activities and produce expected outputs.
<b>Effects</b>	Statement of medium- and long-term outcomes stemming from the achievement of action plans.

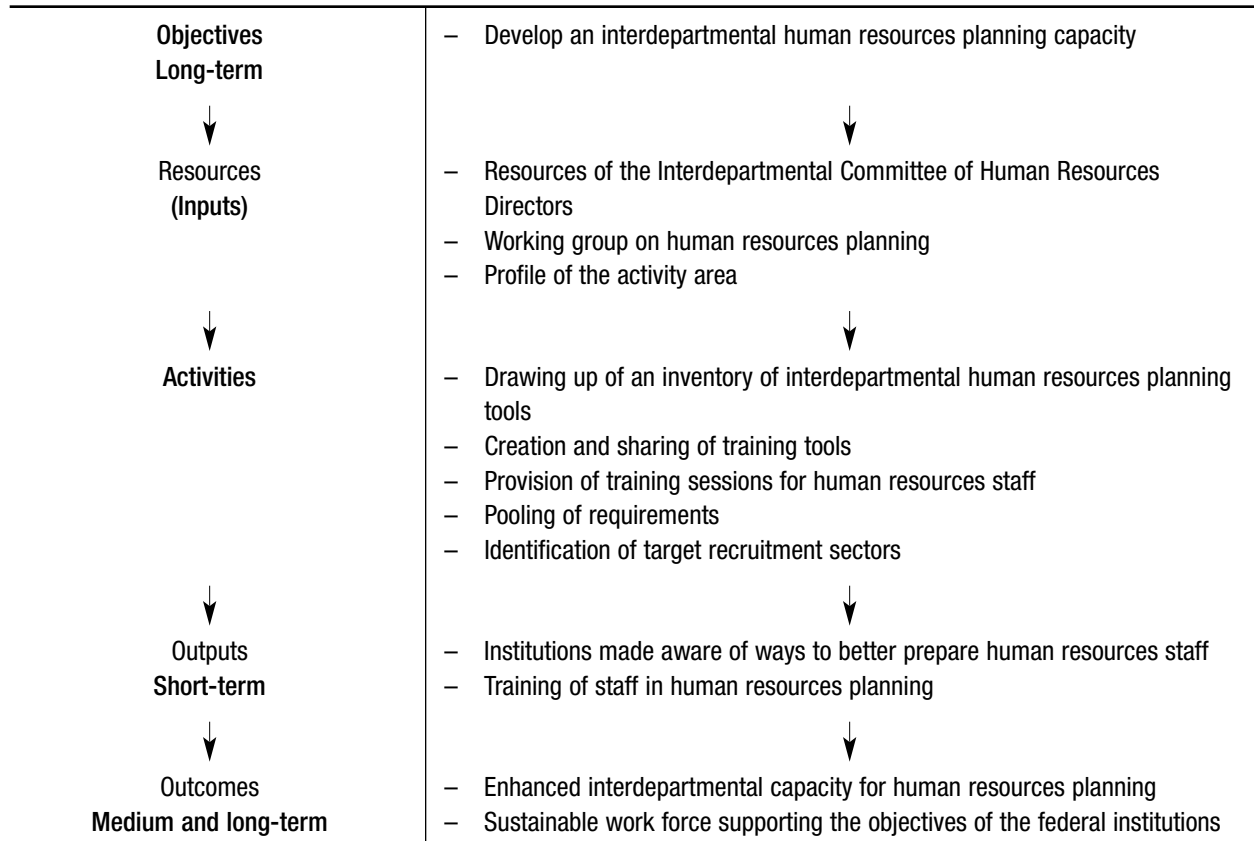


Appendix 8  
Logic Model

<b>Mission, Vision, Directions and Priorities</b>			
<b>Area 1</b>	<b>Area 2</b>	<b>(...)</b>	<b>Area 13</b>
<b>Objectives long-term</b>	<b>Objectives long-term</b>	<b>(...)</b>	<b>Objectives long-term</b>
↓	↓		↓
<b>Resources (Inputs)</b>	<b>Resources (Inputs)</b>	<b>(...)</b>	<b>Resources (Inputs)</b>
↓	↓		↓
<b>Activities</b>	<b>Activities</b>	<b>(...)</b>	<b>Activities</b>
↓	↓		↓
<b>Outputs Short-term</b>	<b>Outputs Short-term</b>	<b>(...)</b>	<b>Outputs Short-term</b>
↓	↓		↓
<b>Outcome Medium and long-term</b>	<b>Outcome Medium and long-term</b>	<b>(...)</b>	<b>Outcome Medium and long-term</b>



# Human Resources Planning Activity Area





## Appendix 10 Performance Indicators by Category<sup>1</sup>

1 Activity Indicators		2 Cost Indicators		3 Satisfaction Indicators		4 Impact Indicators	
1.01	Number of recognized employees	2.01	Cost per participant	3.01	Satisfaction rate of QFC members	4.01	Product use rate
1.02	Number of activities provided	2.02	Cost per activity area	3.02	Satisfaction rate of committee members	4.02	Recommendation implementation rate
1.03	Number of participants in activities	2.03	Cost per activity	3.03	Satisfaction rate of product users	4.03	Strategic advice-related recommendation implementation rate
1.04	Rate of change in activities	2.04	Cost per committee <sup>2</sup>	3.04	Satisfaction rate of partners	4.04	Rate of increased awareness on the part of institutions
1.05	Production rate of deliverables	2.05	Cost per priority <sup>2</sup>	3.05	Satisfaction rate of Committee Co-ordinators <sup>2</sup>	4.05	QFC's recommendation selection rate
1.06	Number of meetings per year	2.06	Budget gap <sup>2</sup>			4.06	Rate of participation by institutions
1.07	Degree of bilingualism in activities <sup>2</sup>	2.07	Cost per institution			4.07	Rate of representativity of targeted groups in institutions
1.08	Average length of meetings <sup>2</sup>					4.08	Rate of awareness of activities of QFC and Committees <sup>2</sup>
1.09	Frequency of updates of a Committee's site <sup>2</sup>					4.09	Membership growth rate <sup>2</sup>
1.10	Attendance rate of department representatives at Committee meetings <sup>2</sup>					4.10	Change in number of partnerships set up <sup>2</sup>
1.11	Attendance rate of QFC members at Committee meetings <sup>2</sup>					4.11	Web site traffic rate <sup>2</sup>
1.12	Participation rate of target groups in Committees <sup>2</sup>						
1.13	Rate of external recruitment of visible minority members <sup>2</sup>						

1. The list of indicators is continually being enhanced to meet the requirements of the QFC and its committees.

2. These potential indicators are not linked to an activity area in 2003–2004.





Appendix 11

# Performance Indicators by Activity Area

Human Resources					
Activity Areas	Performance indicators	Targets	Descriptions	Sources, Collection and Frequency	
Human resources planning	1.02	Number of activities – Training	Number of human resources planning training activities	Committee co-ordinator – Annually	
	1.02	Number of activities – Human resources planning	Number of human resources planning activities provided	Committee co-ordinator – Annually	
	1.03	Number of participants in activities – Training	Number of participants in training activities	Committee co-ordinator – Annually	
	2.02	Cost per activity area – Human resources planning	Total cost of human resources planning activities	Annual cost collection	
	2.01	Cost per participant – Training	Numerator: cost of the training activity/ Denominator: number of participants	Annual cost collection	
	2.07	Cost per institution	Total activity costs chargeable to each institution for this activity area	Annual cost collection	
	4.04	Rate of increased awareness on the part of institutions	70%	Numerator: number of institutions made aware/Denominator: number of member institutions (percentage) Made aware: implies that significant activities were provided for the institutions	Committee co-ordinator – Annually
	4.06	Rate of participation by institutions – Training	70%	Numerator: number of institutions participating in training activities/Denominator: number of member institutions (percentage)	Committee co-ordinator – Annually
					(Continued on next page) —

Official languages in the workplace	2.02 Cost per activity area – Official languages	Total cost of official languages activities	Annual cost collection
2.07	Cost per institution	Total activity costs chargeable to each institution for this activity area	Annual cost collection
4.04	Rate of increased awareness on the part of institutions	70% Numerator: number of institutions made aware/Denominator: number of member institutions (percentage) Made aware: implies that significant activities were provided for the institutions	Committee co-ordinator – Annually
1.01	Number of recognized employees – Distinction Awards Gala	Number of employees recognized at the Distinction Awards Gala for their participation in exceptional interdepartmental activities	Committee co-ordinator – Annually
1.02	Number of activities – National Public Service Week	Number of activities provided during National Public Service Week	Annual cost collection
1.03	Number of participants in activities – National Public Service Week	Number of participants in National Public Service Week activities	Annual cost collection
2.03	Cost per activity – National Public Service Week	Cost of activities provided during National Public Service Week	Annual cost collection
2.01	Cost per participant – National Public Service Week	Numerator : cost of the National Public Service Week activity/Denominator: number of participants in National Public Service Week	Annual cost collection
2.02	Cost per activity area – Recognition	Total cost of recognition activities provided	Annual cost collection
2.07	Cost per institution	Total activity costs chargeable to each institution for this activity area	Annual cost collection
2.02	Cost per activity area – Public Service Employee Survey	Total cost of activities associated with the Public Service Employee Survey	Annual cost collection
2.07	Cost per institution	Total activity costs chargeable to each institution for this activity area	Annual cost collection
4.05	QFC's recommendation selection rate	70% Numerator : number of recommendations selected to be communicated to the institutions/Denominator: number of recommendations submitted to the QFC following the analysis of the survey (percentage)	Committee co-ordinator – Annually

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Learning and development	1.02	Number of activities – Learning			Number of learning activities offered (workshops, information sessions, continuous learning measures, etc)	Committee co-ordinator – Annually
	1.04	Rate of change in activities – Learning			Numerator : number of activities offered over the course of the year less the number of activities offered over the previous year/Denominator number of activities offered over the previous year (percentage)	Committee co-ordinator – Annually
	1.03	Number of participants in activities – Learning activities			Number of participants in learning activities offered (workshops, information sessions, continuous learning measures, etc)	Committee co-ordinator – Annually
	1.04	Rate of change in activities – Interdepartmental mobility			Numerator : number of activities offered over the course of the year less the number of activities offered over the previous year/Denominator: number of activities offered over the previous year (percentage)	Committee co-ordinator – Annually
	2.03	Cost per activity – Learning			Cost of learning activities provided	Annual cost collection
	2.01	Cost per participant – Learning			Numerator: cost of learning activities/ Denominator: number of participants in learning activities	Annual cost collection
	2.02	Cost per activity area – Learning and development			Total cost of activities provided in the learning and development activity area	Annual cost collection
	2.07	Cost per institution			Total activity costs chargeable to each institution for this activity area	Annual cost collection
	3.03.	Satisfaction rate of product users – Learning	85%		Numerator: number of satisfied participants in learning activities/Denominator: number of participants in learning activities (percentage)	Committee co-ordinator – Annually User survey
	4.01	Product use rate – Career Opportunities System	70%		Numerator : number of institutions using the Career Opportunities System/Denominator: number of potential users (percentage)	Committee co-ordinator – Annually
	4.04	Rate of increased awareness on the part of institutions	70%		Numerator : number of institutions made aware/Denominator: number of member institutions (percentage) Made aware: implies that significant activities were provided for the institutions	Committee co-ordinator – Annually
	4.06	Rate of participation by institutions – Learning	70%		Numerator : number of learning activities multiplied by the number of institutions taking part in activities/Denominator: number of institutions (percentage)	Committee co-ordinator – Annually
						(Continued on next page) —

Diversity	1.02	Number of activities – Activities to eliminate obstacles			Number of activities offered to eliminate obstacles that might jeopardize careers	Committee co-ordinator – Semi-annually
	1.13	Rate of external recruitment processes focussing on visible minorities			<b>Numerator:</b> number of external recruitment processes focussing on visible minorities/ <b>Denominator:</b> number of external recruitment processes (percentage)	Committee co-ordinator – Annually
	2.02	Cost per activity area – Diversity			<b>Total cost of activities provided under the diversity activity area</b>	Annual cost collection
	2.07	Cost per institution			<b>Total activity costs chargeable to each institution for this activity area</b>	Annual cost collection
	4.01	Product use rate – Best practices		70%	<b>Numerator:</b> number of best practices used by the institutions/ <b>Denominator:</b> number of best practices distributed multiplied by the number of potential users (percentage)	Committee co-ordinator – Annually
	4.04	Rate of increased awareness on the part of institutions – Measures to eliminate obstacles		70%	<b>Numerator:</b> number of institutions made aware of measures to eliminate obstacles that might jeopardize careers/ <b>Denominator:</b> number of member institutions (percentage) <b>Made aware:</b> implies that significant activities were provided for the institutions	Committee co-ordinator – Annually
	4.07	Rate of representativity of targeted groups in institutions			<b>Average representativity rate for each target group (visible minorities, Aboriginal people, disabled individuals, English speakers) in member institutions</b> Calculating the representativity rate for a target group: <b>Numerator:</b> number of employees from the target group within an institution/ <b>Denominator:</b> number of employees in the institution (percentage)	PSC if available – Annually

Human resources modernization	1.02	Number of activities – Competencies development and training		Number of activities offered focussing on developing the competencies of human resources management staff, middle managers and employees in the compensation sector, and training relating to human resources modernization	Committee co-ordinator – Annually
	2.02	Cost per activity area – Human resources modernization		Total cost of activities provided under the human resources modernization activity area	Annual cost collection
	2.07	Cost per institution		Total activity costs chargeable to each institution for this activity area	Annual cost collection
	4.02	Recommendation implementation rate – Modernization	85%	Numerator: number of recommendations applied/Denominator: number of recommendations issued relative to human resources modernization (percentage)	Committee co-ordinator – Annually
	4.04	Rate of increased awareness on the part of institutions	70%	Numerator : number of institutions made aware following recommendations/Denominator: number of member institutions (percentage) Made aware: implies that significant activities related to competency development and training were provided for the institutions	Committee co-ordinator – Annually

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**Service Delivery**

Activity Areas	Performance Indicators	Targets	Descriptions	Sources, Collection and Frequency
Service quality	2.02 Cost per activity area – Service quality		Total cost of activities carried out under the service quality activity area	Annual cost collection
	2.07 Cost per institution		Total activity costs chargeable to each institution for this activity area	Annual cost collection
	4.01 Product use rate – Best practices	70%	Numerator: number of best practices pertaining to the Government On-Line program used by the institutions/Denominator: number of best practices distributed multiplied by the number of potential users (percentage)	Committee co-ordinator – Annually
	4.02 Recommendation implementation rate	85%	Numerator: number of recommendations applied/Denominator: number of recommendations issued regarding service quality (percentage) Note: Recommendations affect service to users and the measurement of service to users	Committee co-ordinator – Annually
Communication programs and services	4.04 Rate of increased awareness on the part of institutions	70%	Numerator: number of institutions made aware of recommendations/Denominator: number of member institutions (percentage) Made aware: implies that significant activities pertaining to the Government On-line program, user service delivery and the measurement of user service delivery were provided for the institutions	Committee co-ordinator – Annually
	2.02 Cost per activity area – Communication		Total cost of activities provided under the communication programs and services activity area	Annual cost collection
	2.07 Cost per institution		Total activity costs chargeable to each institution for this activity area	Annual cost collection
	3.04 Satisfaction rate of partners (participating institutions)	85%	Numerator: number of partners satisfied with co-operation during trade shows and fairs/Denominator: number of partners taking part in trade shows and fairs (percentage)	Committee co-ordinator – Annually Assumes that a feedback survey will be administered to partners.

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**Horizontal Governance**

Activity Areas	Performance Indicators	Targets	Descriptions	Sources, Collection and Frequency
QFC capacity	1.02 Number of activities		Number of activities on major issues	QFC – Annually
	2.02 Cost per activity area – QFC capacity		Total cost of activities provided under the horizontal management activity area	Annual cost collection
	2.07 Cost per institution		Total activity costs chargeable to each institution for this activity area	Annual cost collection
	3.01 Satisfaction rate of QFC members	85%	Numerator: number of QFC members satisfied with improvements made to strategic decision-making/Denominator: number of QFC members (percentage)	QFC – Annually Assumes that a feedback survey or questionnaire will be administered to QFC members.
	3.02 Satisfaction rate of committee members	85%	Numerator: number of members of the various committees expressing satisfaction with the flow of information/Denominator: number of committee members who completed the survey (percentage)	Policy Committee Co-ordinator – Annually Assumes that a feedback survey or questionnaire will be administered to members of the various committees.
	3.03 Satisfaction rate of product users – Management and Accountability Framework		Numerator: number of individuals satisfied with the tools associated with the management and accountability framework/Denominator: number of people who completed the survey (percentage)	QFC – Annually Assumes that a feedback survey or questionnaire will be administered to potential users.
	4.01 Product use rate	70%	Numerator: number of people using the products/Denominator: number of potential users (percentage) Products are tools such as the accountability framework, common directory and trend report	QFC and Policy Committee – Annually Assumes that a feedback survey or questionnaire will be administered to potential users.
	4.02 Recommendation implementation rate	70%	Numerator: number of recommendations applied/Denominator: number of recommendations issued (percentage) Note: Recommendations affect relations with the Privy Council Office	Policy Committee Co-ordinator – Annually

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Strategic advice	1.02	Number of activities – Analysed issues		Number of issues analysed for the purpose of taking a stand	Policy Committee Co-ordinator – Annually
	1.04	Rate of change in activities		<b>Numerator:</b> number of issues analysed over the course of the year less the number of issues analysed over the previous year/ <b>Denominator:</b> number of issues analysed over the course of the previous year ( <b>percentage</b> ) <b>Note:</b> Issues analysed are related to requests received	
	2.02	Cost per activity area– Strategic advice		<b>Total cost of activities provided under the strategic advice activity area</b>	Annual cost collection
	2.07	Cost per institution		<b>Total activity costs chargeable to each institution for this activity area</b>	Annual cost collection
	4.03	Strategic advice-related recommendation implementation rate	70%	<b>Numerator:</b> number of recommendations applied/ <b>Denominator:</b> number of recommendations issued ( <b>percentage</b> ) <b>Note:</b> Recommendations concerning various issues examined by the Policy Committee, which took a stand on them	Policy Committee Co-ordinator – Semi-annually
	4.05	QFC's recommendation selection rate	70%	<b>Numerator:</b> number of recommendations selected by the QFC on various issues/ <b>Denominator:</b> number of recommendations submitted to the QFC ( <b>percentage</b> )	Policy Committee Co-ordinator – Semi-annually
	(Continued on next page) —				



**Targeted Initiatives**

Activity Areas	Performance Indicators	Targets	Descriptions	Sources, Collection and Frequency	
Aboriginal issues	1.03 Number of participants in activities – Training and awareness		Number of participants (federal employees) in training and awareness activities	Committee co-ordinator – Semi-annually	
	1.02 Number of activities – Training and awareness		Number of training and awareness activities	Committee co-ordinator – Semi-annually	
	2.02 Cost per activity area – Aboriginal issues		Total cost of activities provided under the Aboriginal issues area of activity	Annual cost collection	
	2.07 Cost per institution		Total activity costs chargeable to each institution for this activity area	Annual cost collection	
	3.03 Satisfaction rate of product users	85%	Numerator: number of individuals satisfied with tools developed for stakeholders working in suicide prevention/Denominator: number of stakeholders who completed the survey (percentage)	Committee co-ordinator – Annually Assumes that a feedback survey or questionnaire will be administered to potential users.	
	4.01 Product use rate	70%	Numerator: number of people using the products/Denominator: number of potential users (percentage) Products are tools developed for stakeholders working in suicide prevention	Committee co-ordinator – Semi-annually	
	4.02 Recommendation implementation rate	70%	Numerator: number of recommendations applied/Denominator: number of recommendations issued (percentage) Note: Recommendations are related to improvements in the contractual relationship between the Government of Canada and the First Nations	Committee co-ordinator – Semi-annually	
	4.04 Rate of increased awareness on the part of institutions	70%	Numerator: number of institutions made aware of issues relating to Aboriginals living on reserves and in urban areas/Denominator: number of member institutions (percentage) Made aware: implies that significant activities were provided for the institutions	Committee co-ordinator – Semi-annually	

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Sustainable development	1.03	Number of participants in activities – Training and information		Number of participants in environmental assessment training and information activities	Committee co-ordinator – Semi-annually
	1.02	Number of activities – Training and information		Number of environmental assessment activities offered (information and training)	Committee co-ordinator – Semi-annually
	2.02	Cost per activity area – Sustainable development		Total cost of activities provided under the sustainable development activity area	Annual cost collection
	2.07	Cost per institution		Total activity costs chargeable to each institution for this activity area	Annual cost collection
	3.03	Satisfaction rate of product users – Environmental assessment	85%	Numerator: number of people satisfied with environmental assessment activities offered/Denominator: number of stakeholders who completed the survey (percentage)	Committee co-ordinator – Annually Assumes that a feedback survey or questionnaire will be administered to activity participants.
	4.04	Rate of increased awareness on the part of institutions	70%	Numerator: number of institutions made aware of issues faced by Aboriginal people living on reserves and in urban areas/Denominator: number of member institutions (percentage) Made aware: implies that significant activities related to environmental assessment were provided for the institutions	Committee co-ordinator – Semi-annually



## Appendix 12 Cost Estimate Worksheet

<b>Basic data collected</b>	
1. Number of members	Indicated by institution
2. Member's average number of days of participation	
3. Member attendance rate	
4. Members' annual payroll	
5. Travel costs	
6. Other costs	
7. Financial contributions received (including membership fees)	Indicated by institution
8. Registration fees	
<b>Assumptions</b>	
10. Benefits – 20% of salary	20%
11. Number of days worked	220
12. Real property services – 13% of salary	13%
13. Administration, finance, information technology, human resources services – 11% of salary	11%
<b>Data derived from basic data</b>	
20. Number of days of participation by members (line 1 multiplied by line 2 multiplied by line 3)	
21. Members' average daily salary (4 divided by 1 divided by 11)	
22. Daily salary adjusted for benefits (21 multiplied by 10)	
23. Salary costs associated with the activity (22 multiplied by 20)	
24. Non-salary real property services costs (23 multiplied by 12)	
25. Non-salary administration, finance, information technology and human resources service costs (23 multiplied by 13)	
26. Total non-salary costs (5 + 6 + 24 + 25)	
27. Total cost of the activity (23 + 26)	
28. Percentage of salary cost of the activity (23 divided by 27 multiplied by 100)	
29. Percentage of non-salary cost of the activity (26 divided by 27 multiplied by 100)	
30. Non-monetary cost of the activity (27 minus 7 minus 8)	
<b>Expected outcomes</b>	
40. Non-monetary costs to be allocated to the institution (30 divided by 1)	
41. Non-monetary salary costs to be allocated to the institution (40 multiplied by 28)	
42. Non-salary, non-monetary costs to be allocated to the institution (40 multiplied by 29)	
43. Salary monetary costs of the activity (7 multiplied by 28)	
44. Non-salary monetary costs of the activity (7 multiplied by 29)	
45. Registration fees to be allocated to activity salaries (8 multiplied by 28)	
46. Registration fees to be allocated to non-salary costs of the activity (8 multiplied by 29)	



## Appendix 13 Cost Estimate Example

<b>Basic data collected</b>	
1. Number of members	25
2. Member's average number of days of participation	3
3. Member attendance rate	80%
4. Members' annual payroll	\$1,500,000
5. Travel costs	\$2,000
6. Other costs	\$2,000
7. Financial contributions received (including membership fees)	\$3,000
8. Registration fees	\$4,000
<b>Assumptions</b>	
10. Benefits – 20% of salary	1.20
11. Number of days worked	220
12. Real property services – 13% of salary	13%
13. Administration, finance, information technology, human resources services – 11% of salary	11%
<b>Data derived from basic data</b>	
20. Number of days of participation by members (line 1 multiplied by line 2 multiplied by line 3)	60
21. Members' average daily salary (4 divided by 1 divided by 11)	\$300
22. Daily salary adjusted for benefits (21 multiplied by 10)	\$360
23. Salary costs associated with the activity (22 multiplied by 20)	\$21,600
24. Non-salary real property services costs (23 multiplied by 12)	\$2,808
25. Non-salary administration, finance, information technology and human resources service costs (23 multiplied by 13)	\$2,376
26. Total non-salary costs (5 + 6 + 24 + 25)	\$9,184
27. Total cost of the activity (23 + 26)	\$30,784
28. Percentage of salary cost of the activity (23 divided by 27 multiplied by 100)	70.2%
29. Percentage of non-salary cost of the activity (26 divided by 27 multiplied by 100)	29.8%
30. Non-monetary cost of the activity (27 minus 7 minus 8)	\$23,784
<b>Expected outcomes</b>	
40. Non-monetary costs to be allocated to the institution (30 divided by 1)	\$951
41. Non-monetary salary costs to be allocated to the institution (40 multiplied by 28)	\$667.60
42. Non-salary, non-monetary costs to be allocated to the institution (40 multiplied by 29)	\$283.40
43. Salary monetary costs of the activity (7 multiplied by 28)	\$2,106
44. Non-salary monetary costs of the activity (7 multiplied by 29)	\$894
45. Registration fees to be allocated to activity salaries (8 multiplied by 28)	\$2,808
46. Registration fees to be allocated to non-salary costs of the activity (8 multiplied by 29)	\$1,192



Appendix 14

# Evaluation Questions by Activity Area – Examples

Activity Area	Objectives	Results Measures	Measure Type
Human resources planning	Develop interdepartmental human resources planning capacity	To what extent were interdepartmental human resources planning activities completed?	Success
		To what extent did QFC activities contribute to improving human resources planning within the institutions?	Success
		To what extent did QFC activities contribute to creating a sustainable work force within the institutions?	Success
		What was the cost of QFC activities for the human resources planning activity area?	Cost-effectiveness
		Were the outcomes consistent with the level of effort?	Relevance
Official languages in the workplace	Help create a work environment favourable to the use of both official languages	To what extent did QFC activities contribute to the use of both official languages in the workplace within the institutions?	Success
		What was the cost of activities for the official languages in the workplace activity area?	Cost-effectiveness
		Were the outcomes consistent with the level of effort?	Relevance
Recognition	Recognize the work of public servants and their contribution to the public's quality of life	To what extent did National Public Service Week events contribute to making the federal government an employer of choice?	Success
		What was the cost of organizing National Public Service Week events?	Cost-effectiveness
		Were National Public Service Week outcomes consistent with the level of effort?	Relevance
		To what extent did interdepartmental recognition activities contribute to the development of valid horizontal activities?	Success
		What was the cost of interdepartmental recognition activities?	Cost-effectiveness
		Were the interdepartmental recognition activity outcomes consistent with the level of effort?	Relevance
Public Service Employee Survey (2002)	Help improve quality of life in the workplace	To what extent did analysis activities pertaining to the Public Service Employee Survey generate an interdepartmental action plan?	Success
		Was the action plan carried out?	Success
		To what extent did the action plan contribute to improving federal public servants' quality of life in the workplace?	Success
		What was the cost of interdepartmental activities related to the survey?	Cost-effectiveness
		Were the outcomes consistent with the level of effort?	Relevance

(Continued on next page)

Activity Area	Objectives	Results Measures	Measure Type
Learning and development	Increase government efficiency in the regions	To what extent did committee activities contribute to enhancing the efficiency of the federal government?	Success
		What were the costs associated with interdepartmental committees?	Cost-effectiveness
		Were the outcomes achieved by maintaining interdepartmental committees consistent with the level of effort?	Relevance
	Develop an interdepartmental learning culture	To what extent did interdepartmental learning activities contribute to the development of a learning culture?	Success
		To what extent did interdepartmental learning activities contribute to enhancing the efficiency of the federal government?	Relevance
		What were the costs associated with interdepartmental learning?	Cost-effectiveness
		Were the outcomes consistent with the level of effort?	Relevance
	Enhance interdepartmental mobility	To what extent did mobility-related activities enhance interdepartmental mobility?	Success
		To what extent did interdepartmental mobility contribute to making the federal government in the regions a learning organization?	Relevance
		What were the costs associated with interdepartmental mobility?	Cost-effectiveness
		Were the mobility-related outcomes consistent with the level of effort?	Relevance
	Diversity	Help create a diversified public service that reflects Canadian society and is free of discrimination, prejudice, stereotypes and cultural misunderstanding	To what extent did diversity-related activities contribute to eliminating obstacles to employment?
To what extent did diversity-related activities contribute to increasing the representation of members of visible minorities?			Success
What were the costs associated with diversity-related activities?			Cost-effectiveness
Were diversity-related outcomes consistent with the level of effort?			Relevance
Human resources modernization	Adapt to the requirements arising from human resources modernization	To what extent did QFC activities facilitate human resources management modernization?	Success
		What were the costs associated with human resources management modernization?	Cost-effectiveness
		Were modernization-related outcomes consistent with the level of effort?	Relevance
Service quality	Enhance service quality	To what extent were interdepartmental initiatives implemented to improve federal government service quality?	Success
		To what extent did service-related activities contribute to improving services to the public?	Success
		What were the costs associated with service quality-related activities?	Cost-effectiveness
		Were the outcomes of QFC activities consistent with the level of effort?	Relevance
Program and service communication	Increase consistency in promoting Government of Canada programs and services	To what extent was the co-ordinated promotion of programs and services achieved?	Success
		To what extent did communication activities contribute to increasing consistency in promoting federal government programs and services?	Success
		What were the costs associated with the QFC's interdepartmental communication activities?	Cost-effectiveness
		Were the outcomes consistent with the level of effort?	Relevance

(Continued on next page)

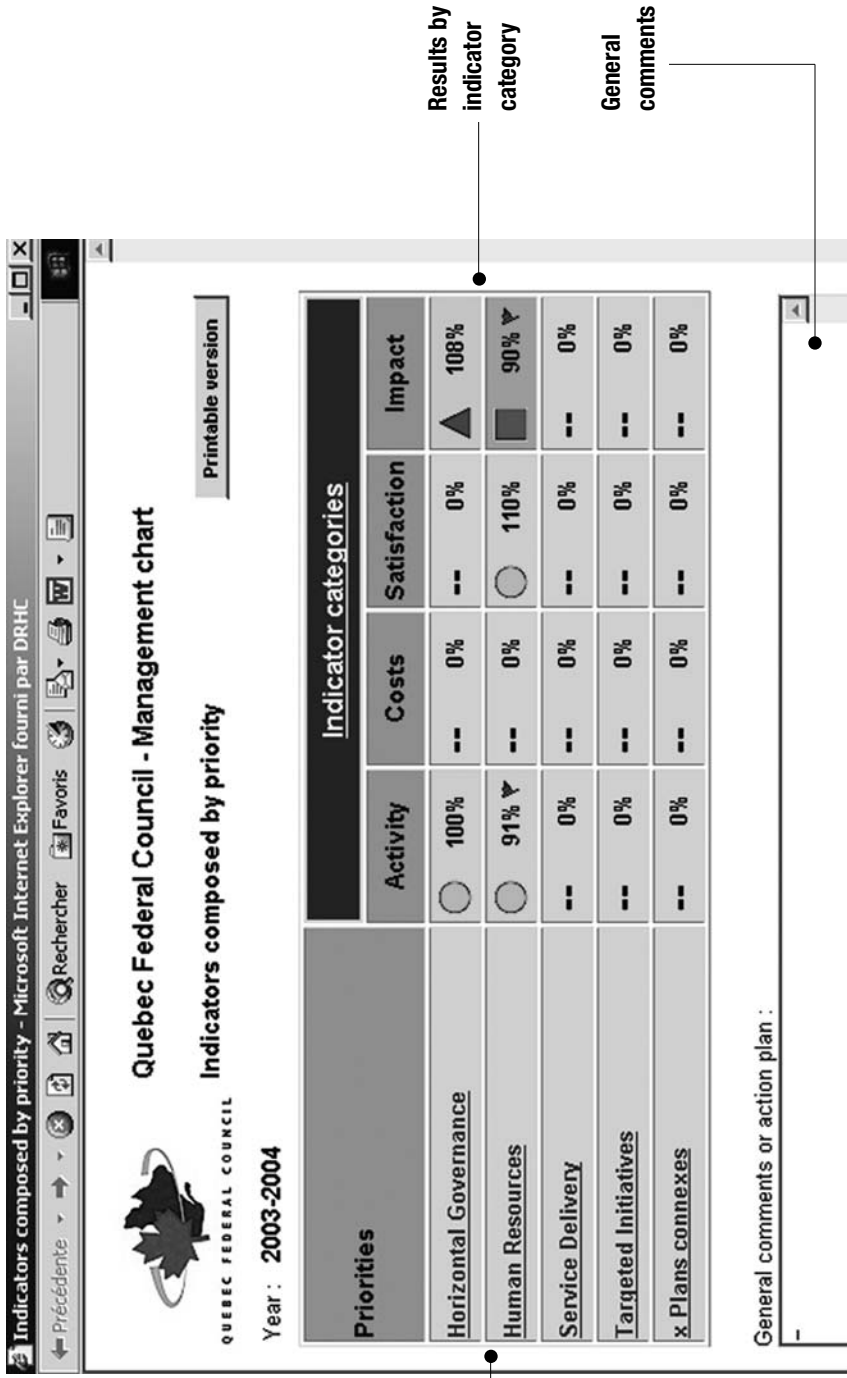
<b>Activity Area</b>	<b>Objectives</b>	<b>Results Measures</b>	<b>Measure Type</b>
QFC capacities	Improve strategic decision-making through enhanced capacities	To what extent were QFC initiatives implemented to improve QFC operations?	Success
		To what extent did the QFC make strategic decisions?	Success
		What were the costs associated with the QFC's co-ordination activities (including those of the Office)?	Cost-effectiveness
		Were the outcomes consistent with the level of effort?	Relevance
Strategic advice	Develop sound strategic analysis capacity and a common vision	To what extent were initiatives implemented to develop the QFC's strategic analysis capacities?	Success
		To what extent did the QFC make strategic decisions?	Success
		What were the costs associated with the QFC's strategic advice-related activities?	Cost-effectiveness
		Were the outcomes consistent with the level of effort?	Relevance
	Exercise increased influence over the development of national policies	To what extent did the QFC's stands on issues influence national policies?	Success
		What were the costs associated with the QFC's influence-related activities?	Cost-effectiveness
Aboriginal people	Enhance the effectiveness of federal action on Aboriginal issues	To what extent were initiatives implemented to improve the effectiveness of federal action on Aboriginal issues?	Success
		To what extent were the improvements made attributable to the QFC?	Relevance
		What were the costs associated with QFC activities relating to Aboriginal issues?	Cost-effectiveness
		Were the outcomes consistent with the level of effort?	Relevance
Sustainable development	Enhance sustainable development measures within the operations of the federal government	To what extent were initiatives promoting sustainable development in federal government operations implemented?	Success
		To what extent did these initiatives contribute to sustainable development?	Success
		To what extent were these initiatives attributable to the QFC?	Relevance
		What were the costs associated with the QFC's sustainable development-related activities?	Cost-effectiveness
		Were the outcomes consistent with the level of effort?	Relevance
	Increase the influence of the federal government for the sustainable development of communities	To what extent were initiatives promoting the sustainable development of communities implemented?	Success
		To what extent did these initiatives contribute to the sustainable development of communities?	Success
		To what extent were these initiatives attributable to the QFC?	Relevance
		What were the costs associated with the QFC's sustainable development of communities activities?	Cost-effectiveness
		Were the outcomes consistent with the level of effort?	Relevance



Appendix 15

Sample reports generated by the management chart

Composite Indicators by Priority Report



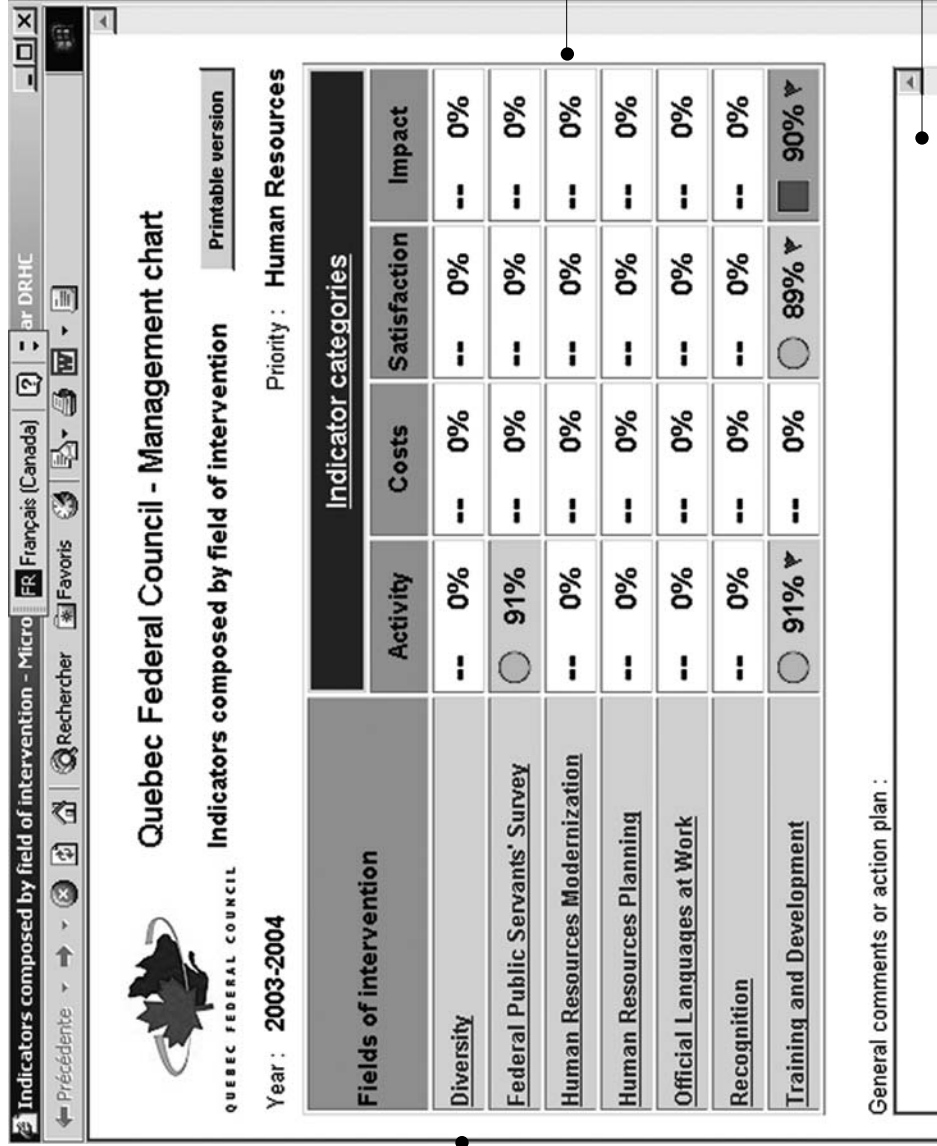
Grouping by priority

Results by indicator category

General comments



# Composite Indicators by Activity Area Report



Grouping by indicator category

Results by indicator category

General comments

## Composite Indicators by Committee Report

Indicators composed by committee - Microsoft Internet Explorer

Quebec Federal Council - Management chart

Printable version

QUEBEC FEDERAL COUNCIL

Indicators composed by committee

Year : 2003-2004

Priority : Human Resources

Field : Diversity

Committees	Indicator categories			
	Activity	Costs	Satisfaction	Impact
Interdepartmental Committee of Human Resources Directors	-- 0%	-- 0%	-- 0%	-- 0%

General comments or action plan :

Note: the data displayed above are fictitious

Grouping by activity area

Results by indicator category

General comments

# Indicators by Outputs Report



Display of year and committee in question	Awaited result	Analysis	Quebec Federal Council on Information Technology				Reliability
			Target	Tolerance	Real	Value	
2003-2004		Indicators by Outputs Report					
<b>Activity</b>							
Ateliers et séances d'information interministériels							
1.02 - Number of activities provided - learning (2.02)							
	Quarter 1		1	1	1	100%	High
	Quarter 2		1	1	1	100%	
	Quarter 3						
	Quarter 4						
1.03 - Number of participants in activities - learning (2.03)							
	Quarter 1		60	15	54	90%	High
	Quarter 2		60	15	54	90%	
	Quarter 3						
	Quarter 4						
Événements spéciaux interministériels (colloques, forums)							
1.02 - Number of activities provided - learning (2.02)							
	Quarter 1		1	1	1	100%	High
	Quarter 2		1	1	1	100%	
	Quarter 3						
	Quarter 4						
1.03 - Number of participants in activities - learning (2.03)							
	Quarter 1		200	25	203	102%	High
	Quarter 2		200	25	203	102%	
	Quarter 3						
	Quarter 4						
Maintenance et développement de réseaux							
1.03 - Number of participants in activities - Meetings							
	Quarter 1		20	5	17	85%	High
	Quarter 2		20	5	17	85%	
	Quarter 3						
	Quarter 4						
1.06 - Number of meetings per year (3.01)							
	Quarter 1		4	1	4	100%	High
	Quarter 2		4	1	4	100%	
	Quarter 3						
	Quarter 4						
1.10 - Taux de participation des institutions aux activités des comités							
	Quarter 1		50%	5%	57%	114%	High
	Quarter 2		50%	5%	57%	114%	
	Quarter 3						

Reports by indicator

Grouping by indicator category

Note: the data displayed above are fictitious

# Costs by Priority Report

Costs by priority - Microsoft Internet Explorer fourni par DRHC

Précédente Recherche Favoris

**Quebec Federal Council - Management chart**

Printable version

**Costs by priority**

QUEBEC FEDERAL COUNCIL

Year: 2003-2004

Priorities	Costs		TOTAL
	Monetary	Not monetary	
Horizontal Governance	\$62,600.00	\$44,559.05	\$107,159.05
Human Resources	\$367,208.00	\$518,557.20	\$885,765.20
Service Delivery	\$0.00	\$0.00	\$0.00
Targeted Initiatives	\$0.00	\$0.00	\$0.00
x Plans connexes	\$0.00	\$0.00	\$0.00
<b>TOTAL OF COSTS</b>	<b>\$429,808.00</b>	<b>\$563,116.25</b>	<b>\$992,924.25</b>

General comments or action plan :

Grouping by priority

Details of financial and non-financial costs

Total cost

General comments

Note: the data displayed above are fictitious

## Committee Action Plan and Output Entry Report

### Committees' action plans management

*Committee :	Official Languages Committee	
Priority :	Human Resources	
Field :	Official Languages at Work	
Objective :	Help create a work environment favourable to the use of both official languag	
Year :	2003-2004 (2003-04-01 - 2004-03-31)	
*Awaited result :	Distribution of best practices pertaining to respect for official languages in th	

	Français	English
Action plan :	ww	w
Analysis :		

**Measurement according to the indicators** Legend

Indicator : **4.04 - Degree of awareness in institutions - of recommendations (1.12)**

Source : Committee coordinator

Ena.	Quarters	Target	Tolerance	Real	Value
<input checked="" type="checkbox"/>	Quarter 1	70	10	-1	--
<input type="checkbox"/>	Quarter 2	0	0	-1	--
<input type="checkbox"/>	Quarter 3	0	0	-1	--
<input type="checkbox"/>	Quarter 4	0	0	-1	--
	<b>YEAR</b>	70	10	-1	--

Note: the data displayed above are fictitious

List filtering field

Action plan and analysis entry field

Box to check to activate or deactivate an indicator

Automatic calculation of the obtained value

Entry fields for targeted and obtained outputs

Action buttons

## Costs by Committee Entry Report

### Modify an activity

*Committee :	Middle Managers' Network	
Priority :	Human Resources	
Field :	Training and Development	
Objective :	Increased government efficiency in the region	
Year :	2003-2004 (2003-04-01 - 2004-03-31)	
*Awaited result :	Network maintenance and development	
*Category :	Co-ordination	
	<b>Français</b>	<b>English</b>
Activity name :	Coordonner les activités du RGI	Coordinate RGI's activities
Average number of days of participation of a member :	220	
Members annual wage :	82196	
Members presence rate :	100	
Travelling expenses total :	0	
Other expenses, excluding real estate, administrative, financial, IT and HR services :	0	
Inscriptions expenses :	0	
<b>Implied institutions</b>		
<input type="checkbox"/>	Aboriginal Business Canada (ABC)	Others Institutions
<input type="checkbox"/>	Agriculture and Agri-Food Canada (AAC)	Members institutions
<input type="checkbox"/>	Air Canada (AirC)	Non-Members Institutions
<input type="checkbox"/>	Business Development Bank of Canada (BDBC)	Non-Members Institutions
<input type="checkbox"/>	Canada Customs and revenue Agency (CCRA)	Members institutions
<input type="checkbox"/>	Canada Mortgage and Housing Corporation (CMHC)	Non-Members Institutions
<input type="checkbox"/>	Canada Posts (CPOSTS)	Non-Members Institutions
<input type="checkbox"/>	Via Rail Canada (ViaRailC)	Non-Members Institutions
		Data by institution >>
<input type="button" value="Save"/> <input type="button" value="Cancel"/>		

Note: the data displayed above are fictitious

Costs by Committee Entry Report (cont.)

Modify an activity (Data by institution)			
Committee :	Quebec Federal Council on Information Technology		
Priority :	Human Resources		
Field :	Training and Development		
Objective :	Increased government efficiency in the region		
Year :	2003-2004 (2003-04-01 - 2004-03-31)		
Awaited result :	Network maintenance and development		
Category :	Meetings		
	<b>Français</b>	<b>English</b>	
Activity name :	Réunions du CFQTI	Meetings of CFQT	
Name	Member count	Contributions	Monetary contributions
Agriculture and Agri-Food Canada (AAC) :	1	0	0
Natural Resources Canada (NRC) :	3	0	0
Parks Canada Agency (PARKSC) :	1	0	0
Public Service Commission of Canada (PSCC) :	1	0	0
Public Works and Government Service Canada (PWGSC) :	1	0	0
Royal Canadian Mounted Police (RCMP) :	1	0	0
Statistics Canada (StatC) :	1	0	0
Transport Canada (TC) :	1	0	0
Veterans Affairs Canada (ACC) :	2	0	0
<b>Save</b>		<b>Cancel</b>	

Displays information on the activity

Table of institutions in question

Entry fields

Action buttons

Note: the data displayed above are fictitious



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