Atlantic Canada Opportunities Agency Agence de promotion économique du Canada atlantique

MODERN BUSINESS MANAGEMENT INITIATIVE
ACTION PLAN
PRIORITY 1

Priority: Ensure continued Leadership Commitment of this initiative.

Objective: Senior management should reiterate its commitment to the Modern Business Management (MBM) Initiative and take action to follow through on identified improvement initiatives.

Champion: President

Project Leader: Director General, Finance, Administration, and Modern Business Management, Head Office

Key Activities	Expected Outcomes • Target Audience	Performance Measures	Milestones	Actions / Progress to Date
Reporting to Executive Committee (EXCOM): regular updates on progress and next steps for follow-through on Modern Comptrollership in ACOA.	EXCOM kept aware of progress and next steps • EXCOM	Number and frequency of reports	Every second month	On target: Regular schedule of oral and written reports to EXCOM adopted and being implemented.
Develop, maintain and promote Web and Intranet sites.	Keep public and staff up-to-date on MBM; Provide internal single point of reference • Public • All staff	Memos from President or MBM unit; Comments and/or hits on MBM site	Ongoing	On target
Through the Capacity Assessment, a number of suggestions for improvements were made. ACOA will regularly review and implement those that have merit on a periodic basis. By regularly implementing these Low Hanging Fruit, the momentum of the initiative is maintained, and staff have practical examples of how it can help them.	Demonstrate MBM progress; Promote buy-in • Impacted staff	Implementation of "Low Hanging Fruit"	Quarterly (as per implementation schedule)	Please refer to Low Hanging Fruit update.

Key Activities	Expected Outcomes • Target Audience	Performance Measures	Milestones	Actions / Progress to Date
Specific Communication: 1) Input to Rendezvous, ACOA's employee newsletter. Produce article on MBM progress. Provide similar articles according to Rendezvous publication schedule.	Increase staff knowledge of MBM; Keep staff up-to-date. • All staff	Articles submitted and published	Submit for November issue and ongoing as per Rendezvous schedule.	Article appeared in Autumn 2002 Rendezvous issue. Quarterly MBM Bulletin; first publication distributed April 25, 2003; second distributed August 12, 2003. Fall issue was distributed on December 3, 2003. Spring issue distributed electronically on April 27, 2004.
Specific Communication: 2) MBM Pamphlet: Produce pamphlet/brochure on MBM progress and Action Plan activities to come. Follow-up to ensure distribution is completed.	Increase staff knowledge of MBM; Keep staff up-to-date. • All staff	Measure distribution of pamphlet	Winter 2003	Developed a MBM Bulletin instead of a pamphlet. See above. Also, MBM posters produced and distributed August 2003.
Investigate the possibility of developing "Team Web Sites" to provide a forum for research and discussion for Action Plan teams. "Team Web Sites" would be available through MBM Intranet site. They would offer a single location to store reference documents and to post discussion items, accessible to all team members.	Facilitate participation and communication of project team members; Improve the quality of Action Plan activities • Project Team	Team Sites programmed and tested; based on results, create team sites for each of the ten Priority Areas	Fall 2002	IT confirmed in January 2002 that technology was tested; Team sites programmed and ready for use. Providing training to users based on user interest.
Promotion of Action Plan: Encourage Champions and Project Leaders to promote their Action Plans.	Increase manager and staff awareness of activities • Managers and impacted staff	Action Plans finalized and communicated to staff through formal and informal sessions	Fall 2002, ongoing	Ongoing
Best Practices seminars: Pilot Phase Departments' Show and Tell. Invite managers from the Pilot Phase to present and discuss their practical experience with Modern Comptrollership, including do's and don'ts. Private sector managers could also be invited, provided their experience is applicable to ACOA. These seminars could be open to managers of other local federal departments.	Increase manager knowledge in specific areas; Promote networking with OGDs • Impacted managers and staff	Number of people who came to give seminars (OGDs & Private); Number of participants (ACOA and OGD); Comment cards at end of seminars	Revised Fall 2003	A Managers' Conference was developed instead of the Best Practices Seminars. The Conference was held on December 4 and 5, 2003. Participants included managers, directors and executives agency-wide.
Promotion of Modern Comptrollership tools and techniques available in the Agency	Increase knowledge and use of helpful tools and techniques • Affected staff and managers	Number of tools and techniques promoted through formal and informal training sessions	Revised Ongoing	Ongoing

Key Activities	Expected Outcomes • Target Audience	Performance Measures	Milestones	Actions / Progress to Date
Training sessions and seminars: Co-ordinate and implement training as identified by Champions. Based on training needs in the Priority Areas, research courses and seminars that could be offered to specific managers and staff. One way to determine needs is to develop a survey.	Increase manager and staff expertise in specific areas of knowledge • Impacted managers and staff	Satisfaction levels as per evaluation forms; Number of courses and seminars researched / offered; Number of staff participants	Winter and Spring 2003	Governance sessions were held in all four regional offices and in Head Office in 2003 focussing on basic management and accountability; training sessions were held in March and April 2004 with managers and supervisors on employee performance appraisals; information sessions will be held with ACOA's regional offices regarding the new integrated planning process in May and June 2004; sessions have been held and are ongoing in ACOA's Nova Scotia regional office on building management competency profiles; sessions will be held on the Agency's new approach to transparency in the coming months; and training sessions will be held Agency-wide on performance measures and indicators once project is completed (part of Q-Access training).
Amend Accountability Accords to include Modern Comptrollership/MBM elements.	Ensure Executives are accountable for practicing Modern Comptrollership; increase staff awareness of accords content • Executives • Staff	Accountability Accords have been modified to include MC elements, and Accords have been communicated to appropriate staff	April 2003	Memorandum sent to EXCOM members regarding the inclusion of MC elements in EX performance agreements in 2003. Memorandum to be sent again to EXCOM member in 2004.
Reporting to TBS and Parliament: update on progress of Modern Comptrollership in ACOA.	TBS and Parliament are kept aware of progress • TBS and Parliament	Number and frequency of reports.	Parliament: Yearly TBS: Ongoing	MBM progress has been reported to Parliament on a yearly basis through the Departmental Performance Report. TBS has been provided MBM quarterly reports.

Key Activities	Expected Outcomes • Target Audience	Performance Measures	Milestones	Actions / Progress to Date
Conduct follow-up Capacity Assessment to assess the progress and adjust activities to improve the state of modern business management practices at ACOA. Present report to EXCOM for approval and support.	Clear indication of progress towards achieving target levels in all modern comptrollership elements • MBM Project Management Office • President • EXCOM	Capacity Assessment conducted, results analyzed and acted upon.	Revised Summer 2004	Deloitte &Touche has been hired to conduct the Capacity Review. Focus group and individual interviews have been scheduled for end of May 2004.

MODERN BUSINESS MANAGEMENT INITIATIVE
ACTION PLAN
PRIORITY 2

Priority: Define the competencies for Modern Comptrollership in the Agency.

Objective: In consultation with the Treasury Board Secretariat, assess the need for formally defined Modern Comptrollership competencies for management positions in the Agency, and develop appropriate training and staffing standards.

Co-Champions: Vice-President, Nova Scotia, and Director General, Human Resources, Head Office

Project Leader: Director, Finance & Management Services, Nova Scotia

During the period Fall 2002 and Fall 2003, our HO HR office undertook some comprehensive research and analysis in the area of Competencies. The objective was to gain a better understanding of competencies and to determine the need within ACOA for formally defined MBM competencies. This undertaking led to the development and implementing of a Pilot Project in the NB region, specifically targeted at Managers in the Business Development unit of the ACOA NB office. The pilot was successfully implemented and has resulted in training recommendations for specific competencies. As a result of this pilot, it was felt that the Agency and its management community would benefit from an Agency-wide model. Below, we describe the work that has begun in this respect and outline some of the future key activities.

Key Activities	Expected Outcomes • **Target Audience**	Performance Measures	Milestones	Actions / Progress to Date
Appointment of a regional co-champion to co-lead the competencies file.	Bringing both a Corporate and Regional leadership and perspective to this Competency-development project. • EXCOM	Commitment of co-champions	Spring 2003	Commitment to co championing this initiative given.
Literature review and research of existing competency profiles (Agency, OGD's and PSC). Explore the TBS draft report on Modern Comptrollership Competency Profiles.	Better understanding of competencies, including their strengths and weaknesses; potential models; other departmental experiences. • Project Team	Comprehensive research material for use in analysis and to determine next steps.	Fall 2003	Reviewed CCRA's and HRDC's Competency profiles, TBS's and PSC's Leadership Competency Profiles. Reviewed available literature on competency. Consulted with the HRDC resident expert on Competencies
Project Leader participating in training on Competencies and Learning Plans	Increased knowledge and better understanding of the application of competencies • Project Leader	Training completed	November 2003	Training completed November, 2003. Piloting the training with ACOA NS Business Development Group

Key Activities	Expected Outcomes • Target Audience	Performance Measures	Milestones	Actions / Progress to Date
Form a Project Team to coordinate and facilitate the creation of the Modern Business Management Competency Profile for the Agency	Framework/process to develop Agency's Modern Business Management Competencies • Project Team	Framework/process established	January 2004	Agency-wide working group formed in January 2004. Had preliminary conversation in January 2004 with a competency expert on facilitating the process.
Ongoing Research	Refinement of understanding, best practices and options • Project Team	Access to tools and information necessary for analysis, consensus-building and decision-making	Ongoing	Project Team has identified: • Best practice models • Subject matter experts (OGD employees, consultants) • Assessment tools (gap analyzer, performance evaluation software)
Project team working together to endorse a competency leadership profile	Team Consensus on a competency profile for managers • Project Team	A Modern Business Management Competency Profile	May-August 2004	Project Team preliminary meeting held to endorse action plan.

Engage the services of a subject matter expert (consultant) to guide the team though the process.

Project Team session was held in May 2004 and facilitated by the consultant.

Consultant has provided a detailed outline of action plan of the major activities to guide the team through the profile development process. |
| Present to EXCOM | EXCOM endorsement of proposed MBM competency profile • EXCOM | Formal endorsement of profile by EXCOM at EXCOM meeting | September 2004 | TBA / To follow |
| Testing the Profile | Communication and introduction of the profile to ACOA managers, Agency – wide • ACOA Managers | Communication strategy Information sessions held in each of the Head and Sub-offices | October 2004 | TBA / To follow |

Key Activities	Expected Outcomes • Target Audience	Performance Measures	Milestones	Actions / Progress to Date
Identifying tools for the implementation of competency assessment	Identification of assessment tools for gap analysis, learning plans and career planning • ACOA Managers	Self Assessment Program Learning Plan Model Access to accredited competency assessors	Fall 2004	TBA / To follow
Development of competency profiles for non-management group	Utilization of competencies for personal development, performance reviews, learning plan development, career planning • ACOA Staff	Competency profiles for a broader group within the Agency	Spring 2005	TBA / To follow

MODERN BUSINESS MANAGEMENT INITIATIVE
ACTION PLAN
PRIORITY 3

Priority: Take action to ensure that the Agency becomes a "Workplace of Choice"

Objective: Following the employee survey results, action should be taken in concert with the « Motivated People » recommendations to further enhance the Agency as an employer of choice.

Champion: Vice-President, New Brunswick

Project Leader: Director General, Human Resources, Head Office

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Key Activities	Expected Outcomes • Target Audience	Performance Measures	Milestones	Actions / Progress to Date
Create an Employee Advisory Committee.	Employee participation / direction of initiative • Applicable staff	Committee in place and functioning	Completed	
Employee Survey to benchmark ACOA as an employer of choice and identify areas for improvement.	Baseline information regarding current status of ACOA as an employer of choice • Employee Advisory Committee	Completion of survey	Completed	The survey results report was released to all staff on August 12, 2003. A meeting of the Employee Advisory Committee (EAC) Committee has not yet taken place as we are looking into other initiatives that might be undertaken (Reimbursement of professional Fees, EAP, 360 Feedback, etc.). The results were, however, discussed at EXCOM with each VP responsible for looking into things in their respective regions/sectors.

Key Activities	Expected Outcomes • Target Audience	Performance Measures	Milestones	Actions / Progress to Date
Benchmark ACOA vis-à-vis other organizations in the public and private sectors. Identify employee priorities for improving ACOA as an employer of choice.	Increased public recognition, employee pride, and facilitated recruitment • Agency managers and staff	Completion of benchmarking	Completed	ACOA made the short list of 200 employers in Mediacorp Inc.'s "Top 100 Employers in Canada" Publication. MacLean's Magazine refers to this publication in compiling their own listing. Although not in the top 100, to be short-listed amongst 6000 is impressive in itself, and guarantees us consideration again next year. It is difficult to benchmark ACOA against Private sector employers given that we are bound by public service policies etc. in terms of benefits, but the 2002 Public Service-wide Employee Survey results certainly show ACOA in a favourable light in comparison to other OGD's.
Identify and implement specific actions to improve ACOA as an employer of choice through focus groups and employee advisory committee.	Improvement in employee satisfaction, increased public recognition, and recruitment and retention benefits • Agency managers and staff	Implementation of Action Plan; Improvement of employee satisfaction in future Public Service-wide Employee surveys	Revised Fall 2003/Winter 2004	On track. A short list of potential initiatives, which could be quickly implemented, has been identified. These initiatives are being explored for potential recommendation to EXCOM. Examples include pursuing the re-imbursement of professional fees, providing EAP sessions throughout the Agency, etc.

Key Activities	Expected Outcomes • Target Audience	Performance Measures	Milestones	Actions / Progress to Date
Continue monitoring of progress in becoming and maintaining a workplace of choice using future Public Service employee surveys.	Maintain Workplace of Choice standards at ACOA • Agency managers and staff	Completion and analysis of future surveys	Ongoing	TBS had scheduled a session for DM's (which would have been followed by a session for Public Service Champions,) on June 20th. This session was cancelled and we recently received the Survey Follow up Advisory Committee's final report with recommendations. Again ACOA showed up very well, scoring more that 10% above the Public Service mean-average on many questions. A Workplace Well Being Committee is being proposed for creation in HO. Separate and distinct from OSH, this committee will focus solely on activities to improve well-being in the workplace. This key activity is seen as being complete. There are no further surveys - either within the Public Service or within ACOA- planned in the immediate future.

MODERN BUSINESS MANAGEMENT INITIATIVE
ACTION PLAN
PRIORITY 4

Priority: Increase public reporting transparency and improve internal communications.

Objective: Identify information that should and could be made available to the general public and employees through the Agency's Web site and other mechanisms.

Champion: Vice-President, Newfoundland and Labrador

Project Leader: Director, Finance & Management Services, Newfoundland and Labrador

Key Activities	Expected Outcomes • Target Audience	Performance Measures	Milestones	Actions / Progress to Date
INTERNAL TRANSPARENCY:				
Determine the level of employee satisfaction with internal communications and identify problem areas. (using the information provided through the Workplace of Choice and the 2002 Public Service-wide Employee surveys)	Specific communication gaps are identified and understood • Project Team	Survey results compiled and tabulated; Benchmarks established	January 2003	The 2002 Public Service-wide Employee Survey has been reviewed and relevant questions have been identified. The Workplace of Choice survey did not provide any relevant information for this priority and therefore alternative means to collect the information were undertaken. Bristol Group conducted focus groups with staff in late spring 2003 to determine the level of employee satisfaction with internal communication.
Identify the formal and informal channels of vertical and horizontal communication.	The mechanics of internal communication in the Agency are defined and understood • Project Team	Listing of techniques and practices prepared	March 2003	As a result of the above mentioned focus groups, Bristol Group has prepared a report on internal communications at ACOA. The report identifies the formal and informal means of communication used at ACOA.

Key Activities	Expected Outcomes • Target Audience	Performance Measures	Milestones	Actions / Progress to Date
Identify the strengths and weaknesses of current communications practices. Develop the strengths and mitigate the weaknesses of current communications practices, specifically concentrating on cross-functional and cross-regional communications.	Improvement in flow of information between functional areas and regions • All staff	Listing of strengths and weaknesses prepared; Best practices identified; Barriers identified	June 2003	Final report completed.
Identify Best Practices for improving information flow. Provide forum for continuous sharing of Best Practices.	Increased knowledge sharing; Communication approaches are shared, which can then be applied to other units and regions • All staff	Communication Plan prepared	September 2003	Final report completed.
Recommend to EXCOM solutions for improving internal transparency.	Senior management commitment and support • EXCOM	Report, including recommendations, prepared for EXCOM	Fall 2003	Final report completed and copies forwarded to EXCOM in Spring of 2004.
Implement approved solutions.	Agency's internal communications become more transparent; staff has access to better, more complete information for decision-making. Staff feels they are kept abreast of developments in the Agency • All staff	Action Plan prepared; Survey to determine staff satisfaction after implementation	Fall 2003	Final report completed. Recommendations to be reviewed by EXCOM at a future meeting in 2004.
EXTERNAL TRANSPARENCY:				
ACOA information: • Identify and categorize the types of information produced in the Agency. • Identify what information is currently available to the public through the Internet and other media.	Possible information gaps are identified • Project Team	Listing of current information being produced in the Agency and mechanism for public access	December 2002	A listing of information available on the Agency website and through other media has been prepared. A listing of Reports and Studies currently produced by the Agency has also been completed.

Key Activities	Expected Outcomes • Target Audience	Performance Measures	Milestones	Actions / Progress to Date
Access to Information and Privacy (ATIP) requests: Analyze formal ATIP requests for information, including verbatim (what is being requested), number of occurrences of similar requests, frequency of these similar requests.	Better understanding of public information needs and trends, based on requestor type • Project Team	Working document-containing analysis of ATIP requests and responses	March 2003	ATIP reports were completed for 2001 and 2002. It was recognized that reducing the number of ATIP requests may be difficult. Recommendation to make the responses more available to the public is included in the final report.
ATIP responses: Analyze responses to ATIP requests for information. Determine information and reports that could be made public on an ongoing way, including the mechanism to be used.	Better understanding of Agency official responses • Project Team	Working document-containing analysis of ATIP requests and responses	March 2003	ATIP reports were completed for 2001 and 2002. Final Report with recommendations has been completed.
Informal requests: Survey the types of informal requests for information that staff receive; identify the nature of such requests, their origin, their frequency, and how they are handled.	Better understanding of ad hoc public information needs and trends • Project Team	Working document containing analysis of informal requests and responses	June 2003	Obtaining this information proved to be difficult. Final report is completed and recommends improved collection of data on informal requests.
Informal responses: Analyze responses to informal requests for information. Determine information and reports that could be made public on an ongoing way, including the mechanism to be used.	Better understanding of informal sharing of information with public • Project Team	Working document-containing analysis of informal requests and responses	June 2003	See above.
Obstacles to the release of information: Review relevant legislation including ATIP, as well as parliamentary and Auditor General's requirements, while considering sensitivity of information / reports subject to greater availability.	Balanced approach to considering release of information • Project Team	Listing of "obstacles" and rationale	August 2003	*Access to Information Act* is main source of guidance on this. Final report recommends that employees be trained in exemptions from ATIP.
Handling informal requests: Develop an Agency policy / guideline on handling informal requests for information to ensure consistent approach. Use existing communication policy, ATIP laws and TBS directives for basis. Recommend to EXCOM for approval and for staff training.	Clear guidelines are available and training is provided on process for dealing with informal requests for information • All Staff	Policy / guideline produced	October 2003	Final report recommends improved data collection in this area in Spring of 2004.

Key Activities	Expected Outcomes • Target Audience	Performance Measures	Milestones	Actions / Progress to Date
Client base: Increase communication with our clients – explore regular mechanisms to share Best Practices and other useful information for our clients. (Newsletter…)	Clients are better informed and can benefit from shared practices • ACOA Clients	Best Practices mechanism identified and implemented	November 2003	Final report recommends a link on the web-site for clients.
Increase and maintain transparency: Prepare a report for EXCOM approval including: • The rationale for releasing the additional information; • Recommended steps to increase and maintain a transparent reporting environment; and • The media to be used.	Approval for a course of action, as well as support and commitment from senior management • EXCOM	Report for EXCOM approval and implementation	December 2003	Final report completed and forwarded to EXCOM in April 2004.
Communicate changes to Staff: Conduct brief information sessions to staff to address the changes to the Agency's approach to public transparency.	Staff are aware of increased transparency • All Staff	Information sessions conducted	Revised Fall 2004	Pending EXCOM decision.

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MODERN BUSINESS MANAGEMENT INITIATIVE
ACTION PLAN
PRIORITY 5

Priority: Integrate the Planning Processes

Objective: Formally define the planning processes, showing the relationships between related components, and communicate the planning processes to staff. Recommend enhancements to the processes.

Champion: Vice-President, Finance & Corporate Services, Head Office

Project Leader: Director General, Finance, Administration, and Modern Business Management, Head Office

Key Activities	Expected Outcomes • **Target Audience**	Performance Measures	Milestones	Actions / Progress to Date
Define the current planning process at ACOA to clearly identify linkages and gaps, triggers, authorities, documentation and other elements of the planning process (using tools such as flow charts and descriptions).	A clearly understood description of various planning activities currently used in the Agency • Project Team • President	Documentation on planning processes, flow charts, etc.	March 2003	Interviews with planning contacts have been conducted in all branches and regions; Notes and charts finalized in late March 2003.
Review specific OGDs planning processes (e.g. DIAND and VAC, HRDC).	An understanding of practice in selected OGDs and identification of possible best practices • Project Team	Analysis completed	March 2003	The planning processes of HRDC, National Defence, RCMP, INAC and Environment were reviewed to identify best practices.
Analyze the strengths and weaknesses of the planning process.	A better understanding of opportunities for improvement • Project Team • EXCOM	SWOT analysis completed	April 2003	Preliminary report prepared early April 2003 with proposed Planning Process Chart.

Key Activities	Expected Outcomes • Target Audience	Performance Measures	Milestones	Actions / Progress to Date
Identify and recommend improvements to the planning process (automation?) for EXCOM approval and support.	Approval and support for implementing a refined planning process • EXCOM	List of possible enhancements; Flow chart of improved planning processes; Report to EXCOM	June 2003	Preliminary report and Chart presented to EXCOM for approval and authority to scope out the detail of the improved planning process on July 9, 2003; chart was approved, and authority to scope out detail granted. Detailed implementation plan drafted.
Communicate changes to all staff.	Increased awareness and understanding of improvements to planning process • All staff	Memos, information sessions	Revised Fall 2003	The improved planning process was presented to managers at the Managers' Conference on December 4, 2003.
Implement improvements as outlined in EXCOM report.	An effective planning process, which is known to and understood by all staff • All staff	Enhancements are in place	Revised January 2004	EXCOM approved detailed integrated planning process in March 2004.

Working with regions/branches to slowly implement improvements. |

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MODERN BUSINESS MANAGEMENT INITIATIVE
ACTION PLAN
PRIORITY 6

Priority: Integrate Planning and Performance Information

Objective: Recommend improvements to integrate the planning and performance reporting processes.

Champion: Vice-President, Finance & Corporate Services, Head Office

Project Leader: Director General, Business Intelligence and Chief Information Officer (CIO), Head Office

Key Activities	Expected Outcomes • Target Audience	Performance Measures	Milestones	Actions / Progress to Date
Identify current performance measures that are being tracked manually. What are we reporting on as far as performance in the regions and from a corporate perspective?	Better understanding of performance measures being used, who is using them, and for what purpose • Project Team	Complete inventory of current regional and corporate performance measures	January 2003	Data from NB is complete, based on the experience and discussions with the region, it was determined that a closer link to the actual measures and commitments in the DPR and the RPP is required. The DPR and RPP are being analysed and a listing is being prepared. This will essentially combine items 1 and 2. Work now continues on new set of indicators.
Validate the current performance measures by determining whether they are relevant and complete. Identify new measures that would complement existing ones.	Better understanding of the performance measures that should be used • Project Team	Inventory of current and new performance measures	March 2003	See note in section above. Met with program Directors and presented preliminary options to EXCOM as part of IM/IT strategic plan. Detailed listing of DPR and RPP indicators completed. Work now continues on new set of indicators.

Key Activities	Expected Outcomes • **Target Audience**	Performance Measures	Milestones	Actions / Progress to Date
Determine the data sources required to produce the performance measures.	Technical understanding of the information needed to support performance measurement in the Agency • Project Team	Inventory of data sources used in the creation of performance measures	March 2003	Data sources have been identified and some modifications to the data warehouse have been completed. Additional tables have been identified. New data sources are being created to meet the PM needs of non-commercial ACOA staff.
Re-evaluate the performance measures in conjunction with the defined planning process from (Priority Area 5) to see if they support decision-making and planning.	Alignment of performance measures with the newly established planning process • Project Team	Performance measures linked to the planning process	Revised Fall 2003	Planning and reporting framework completed. Priorities 5 and 6 will now continue in sync.
Conduct feasibility study and cost/benefit analysis of tracking the improved performance measures.	Balanced approach to assessing the implementation of the improved performance measures • Project Team	Costs and benefits of improved performance measurement tracking is established	August 2003	Reviewed tools available for performance measurement reporting. First set of tools created and tested. Contents to be determined. Additional costing information has been added to several modules in Q-Access. A decision on how they are to be used is required.
Recommend to EXCOM the automation of tracking these performance measures. Create and implement performance measures system.	Approval and support for the implementation of an automated performance measurement system • Project Team	Performance measurement system in production	Revised Spring 2004	Need to make decision of a performance tracking strategy before presentation to EXCOM.

Key Activities	Expected Outcomes • **Target Audience**	Performance Measures	Milestones	Actions / Progress to Date
Decision to separate performance measurement into two project streams. The first, closely linked to Priority Area 5, will be a simplified system that will concentrate on linking the new and evolving PAA to outcomes and a select few outputs. The second is a more complex system that will automatically track outputs at a level required by operational managers while at the same time will serve as a feeder to the DPR for the selected indicators.	Solution 1 Excel worksheets that can easily be modified as the conditions change. Solution 2 Computer application built as part of QAccess and the new contract system to track outputs and activities. • Managers	Systems completed	End of summer 2004	Solution 1 is complete and is being adjusted as required. Solution 2 is under development.
Train staff on the Agency's performance measures and indicators, how they are developed, tracked and reported on. Explain the links that exist between the performance measures, the planning process, and their day-to-day work.	Increased understanding and awareness of performance measures and the performance measurement system • All staff	Training offered	Fall 2004	TBA
Explore and expand performance measures to areas other than Programs (e.g. HR, Contracting).	Holistic approach to performance measures • Project Team	Performance measures are expanded to areas other than Programs	The same activities as previously outlined would be done in succession to the Programs measures	TBA

MODERN BUSINESS MANAGEMENT INITIATIVE
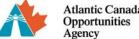## ACTION PLAN
PRIORITY 7

Priority: Continue to implement the Strategic Plan for Service Quality

Objective: Enhance the enabling work environment and clarify responsibilities to improve service quality to our clients.

Champion: Vice-President, Policy and Programs, Head Office

Project Leader: Director General, Operations, Head Office

Key Activities	Expected Outcomes • Target Audience	Performance Measures	Milestones	Actions / Progress to Date
1) Measuring client satisfaction: Conduct second corporate client survey to obtain information (results) on satisfaction levels and importance of service and to identify areas/priorities for improvement. Conduct in-depth analysis of current survey results and comparison against previous survey results.	Comprehensive data on current level of service delivery, including client expectations (importance) and perceptions (satisfaction); Better identification and understanding of areas needing study/improvement • Project Team • Programs managers and staff • Clients	Second corporate client survey instrument which uses 34 key performance indicators based on the government's common measuring tool-CMT; Report on Client Satisfaction	Survey conducted: Winter 2003 Survey Results Report: Spring 2004	The Agency's second client satisfaction survey exercise was completed in Dec 2003. Consultant in the process of drafting report. Excellent overall participation as 603 paper based surveys were returned by clients for an overall response rate of 43.1%. It is expected that final report will be completed by the end of May 2004. Overall Satisfaction rating in the low 80% (very good).
2) Training/skills Development: To implement a systematic corporate process of identifying service quality/program delivery weaknesses.	Capacity for Head Office and regions to produce and update their own process maps • Specific programs staff	Head Office and regional staff trained on using process mapping software	December 2002	Technology has been transferred to regions allowing process maps to be maintained.

Key Activities	Expected Outcomes • Target Audience	Performance Measures	Milestones	Actions / Progress to Date
3) Client Service Improvement Plan (SIP): Development and implementation of a service improvement plan in conjunction with the Directors / Directors General of Programs.	Improved service delivery and client satisfaction • Clients	Service improvement plan is implemented and client satisfaction is monitored	February 2004	Regional SIP's have now been all submitted and reviewed during the last Quality Coordination Group meeting. Preliminary SIPs shared with Program Directors prior to consideration by EXCOM.
4) Measuring employee satisfaction: Utilization of corporate employee (Account Managers) survey information (results) on satisfaction levels, importance of service, to identify areas / priorities for improvement.	Key information on elements of employee expectations; importance and satisfaction levels; critical barriers; and priorities for improvement • Project Team • Programs managers • Employees (Account Managers)	Second on-line employee survey; Improvement plan based on employee and client feedback	Revised Spring 2004	In light of the number of ongoing surveys in government, the committee agreed for the use of an employee focus group approach in each region to review the findings of the second client corporate survey in order to provide feedback.
5) Complaint Management: To complete the development of a formal corporate complaint/redress mechanism that outlines the actions clients can take if they have service related concerns/suggestions.	Formal methods and processes in place allowing the Agency to receive and resolve client complaints • Programs managers and staff	Indicators to track complaints and their resolution and provide feedback on areas needing improvements	March 2004	Redress process has been drafted and reviewed by the Quality Coordination Group. Redress process is now being redesigned based on additional research and the process is now being modified before it can be finalised for EXCOM consideration.
6) Complaint Tracking System: To establish a tracking system within the organization to manage complaints and report to senior management on an annual basis. Provide training to users.	Enhanced tracking and analysis of client complaints • Programs managers and staff	System in place; Users trained	May 2004	Work is ongoing.

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MODERN BUSINESS MANAGEMENT INITIATIVE
ACTION PLAN
PRIORITY 8

Priority: Integrated Risk Management Framework

Objective: Establish an Integrated Risk Management Framework as per Treasury Board Guidelines.

Champion: Vice-President, Nova Scotia

Project Leader: Senior Economist, Policy and Research, Nova Scotia

Key Activities	Expected Outcomes • Target Audience	Performance Measures	Milestones	Actions / Progress to Date
Define risk management (RM) in the ACOA context: ▪ what it is; ▪ what we are trying to accomplish; ▪ why do it.	RM definition for ACOA • Project Team • Senior Management	Definition developed and shared	December 2002	Draft RM definition developed; shared among project team and EXCOM. Committee liaison representatives identified in each regional office.
Review RM frameworks of other departments.	Knowledge of trends/practices from other departments • Project Team	Frameworks of three departments reviewed	January 2003	3 Frameworks reviewed; additional frameworks to be reviewed, with concentration on smaller departments. Challenge: many smaller departments are at an early stage of RM awareness.
Develop ACOA template for use in reviewing/reporting on risk.	Standard tool for use across the Agency • Regional office management teams	Template developed and approved by RM Team	February 2003	Draft Template developed and circulated among RM team for comment.
Present template to EXCOM for approval.	Feedback on progress, any necessary adjustment made to process • EXCOM • Project Team	Template discussed; any recommended edits made	May 2003	Draft Template presented to EXCOM.

Key Activities	Expected Outcomes • **Target Audience**	Performance Measures	Milestones	Actions / Progress to Date
Consultant with expertise in public sector RM engaged to implement Risk Assessment Questionnaire among a sample of ACOA managers on their perceived risks, potential impacts & outcomes.	Risk Assessment questionnaire developed and administered to a sample of ACOA managers. • Project Team • Managers	Questionnaires developed, administered and returned.	September-November 2003	Consultant engaged; Risk Assessment Questionnaire administered to a sample of some 34 managers representing a cross-section of functional areas across the Agency. Response rate of approximately 65%.
RM is highlighted at ACOA Middle Managers' Conference on Modern Business Management	Shared information at management level, Agency-wide understanding of exercise, status and next steps. • Managers & directors from across Agency.	Presentations made to ACOA managers by Project Leader and consultant on theory and practice of RM at ACOA.	December 2003	Conference held December 4 & 5, 2003. Agenda included significant time devoted to the topic of RM.
Facilitated Workshop lead by consultants to develop Corporate Risk Profile, assess likelihood and impact of identified risks and discuss highest priority risks.	Decisions on prioritized risks at Agency and regional office levels and further development of RM process • Managers & directors from across Agency.	Workshop held; report produced by consultants based on identified risk priorities.	February 2004	Workshop held in Halifax Feb 12 & 13; 15 ACOA attendees, including approximately 10-12 respondents to the Risk Assessment Questionnaire. Report submitted April 6, 2004.
Project Team works with Champion to draft Integrated RM Framework based on Corporate Risk Profile and identified mitigation measures.	Draft Integrated RM Framework for the Agency • Project Team and champion • EXCOM	Draft Integrated RM Framework prepared.	May-June 2004	Report discussed at the May 2004 EXCOM meeting. Action plan has been requested for the top three Agency risks.
Champion puts forward draft Integrated RM Framework for EXCOM review, approval and support; executives' accountability for RM is clarified.	Senior management approval of draft RM Framework and next steps. • EXCOM	IRMF finalized and actions are undertaken.	June 2004	TBA
Adjust existing controls and develop new controls in the context of the Agency's Integrated RM Framework.	Enhanced control framework, reflective of IRMF • Agency	Existing controls adjusted and new controls developed	Summer 2004	TBA

Key Activities	Expected Outcomes • Target Audience	Performance Measures	Milestones	Actions / Progress to Date
Conduct training sessions for staff on the IRMF, the new and adjusted controls, and their role in managing risk at ACOA.	Increased understanding of RM and controls, and better use of RM tools. • All staff	Training sessions held	Fall 2004	TBA

MODERN BUSINESS MANAGEMENT INITIATIVE
ACTION PLAN
PRIORITY 9

Priority: Expand business process improvement initiative to all programs

Objective: Continue with current pilot project in New Brunswick to establish service standards. Review Agency programs and operations to identify areas where service standards could be established. Continue to implement Strategic Plan for Service Quality and assess the need for standards for functional specialists' internal service delivery.

Champion: Vice-President, Policy and Programs, Head Office

Project Leader: Director General, Operations, Head Office

Key Activities	Expected Outcomes • Target Audience	Performance Measures	Milestones	Actions / Progress to Date
1) Process Mapping for non-commercial BDP projects entails the documentation and schematic presentation of work flow to fully comprehend the processes involved in providing our products and services to internal and external clients.	Better understanding of delivery systems and allowance for improved capacity to identify opportunities for system improvements • ACOA management and staff; new employees	Reference document containing a complete set of process maps for non-commercial projects under BDP (application and evaluation process) in all other regions except N.B. (already completed)	End of June 2003	To be completed for all regions by Spring 2004.
2) Expand / implement Process Mapping approach to other core/programming activities such as the CBDCs, SCIF, AIF and CBSCs in all regions.	Better understanding of delivery systems and allowance for improved capacity to identify opportunities for system improvements • ACOA management and staff; new employees	Reference document containing a complete set of process maps for other core / programming activities in all regions.	End of June 2004	Process mapping activity for the SCIF program completed for all regions in January, 2003. Review Services have completed the activities associated with the mapping exercise for the N.B. CBSCs. (8 out of 8 activities have been mapped).

Key Activities	Expected Outcomes • Target Audience	Performance Measures	Milestones	Actions / Progress to Date
3) Establish Service Standards for BDP Development and monitoring of client service standards; maintaining and updating standards. Complete Pilot Project in NB, and continue with standards development for BDP in all other regions.	Capacity to measure and compare BDP performance based on empirical data • Programs managers and staff	Published standards for BDP at point of service	Pilot: March 2003 Other regions: August 2003	Tracking transmittal forms for remaining regions (N.B. completed) has been completed. Exercise for tracking documents for the development of standards for remaining regions started in May 2003 and is near completion. Historical numbers obtained from the corporate system to be reconciled with sample information for further consideration by Program Directors prior to providing for EXCOM.
4) Service Standards for Other Agency Programs and Operations: Review Agency programs and operations to identify areas where service standards could be established, and assess the need for standards for functional specialists' internal service delivery.	Capacity to measure and compare programs and internal service delivery performance based on empirical data • ACOA managers and staff	Published standards for major business lines at point of service	Programs: End of March 2004 Internal service delivery: Revised June 2004	While it is expected that program standards for SCIF will be completed by the end of this fiscal year, a more realistic timeframe (June 2004) for the completion of the exercise to assess the need for internal service delivery standards is more appropriate at this time.

MODERN BUSINESS MANAGEMENT INITIATIVE
ACTION PLAN
PRIORITY 10

Priority: Increase the availability of cost management information for better assessment of value for money of ACOA activities. Review financial management reporting regime.

Objective: Study the benefits of activity costing of service delivery and recommend appropriate action. Enhance the financial management reporting regime to facilitate financial management analysis and decision-making.

Champion: Vice-President, Prince Edward Island and Tourism

Project Leader: Director, Corporate Programs & Services, Prince Edward Island

Key Activities	Expected Outcomes • **Target Audience**	Performance Measures	Milestones	Actions / Progress to Date
Financial Reporting project:				
Survey offices (via group discussion) to identify the financial reports being used, areas where improvements could be made, and what reports or information are needed.	Better understanding of internal user needs • Project Team	Group discussions held, reports identified and suggestions for improvements made	Completed	Team interviewed a sample of managers (based on 2002 Capacity Assessment interview questions) to define financial reporting needs.
Review requests for improved and/or new reports to determine whether the requests can be met through existing reports in other regions. If so, educate users through information sessions.	Internal users are better informed on reports and information available to them • Agency managers and staff	Information sessions held	Completed	Team assessed interview results. Managers responded they receive the information/reports required. Responses indicated that reports are generated using numerous software programs (not a common set of reports used by all regions). EXCOM approved that the team focus on building a set of common financial reports.

Key Activities	Expected Outcomes • **Target Audience**	Performance Measures	Milestones	Actions / Progress to Date
Form a focus group of users (various managers/directors) to determine information needs. Two focus groups – one for contributions and one for operating.	Ensure key information for decision-making is available • Agency managers and staff	Adjustment to database or system	Winter 2004 April – June 2004	Focus group for contributions met January 29, 2004 to agree on common information/reports needed. Draft product to be developed internally by end of February 2004, live production by end of May 2004. Second focus group will be formed to consider operating information and reports requirements.
Promote enhanced financial reporting. Provide training to potential users of new reports.	Better understanding and use of Agency financial reporting capabilities • Agency managers and staff	Training sessions held	April – June 2004	TBA
Value for Money of ACOA activities:				
Identify users of financial information and the purposes for which they use information. This will identify the mix of people on the project team.	Balanced approach with representation from key stakeholders • Project Team	User groups identified and represented on project team	December 2002	Completed
Consider various ways financial information can be allocated/allotted (e.g. by program) for both contributions and O&M. Determine whether required information is, or can be, captured or if the current system needs modifications.	Determine options to consider increasing cost management information at ACOA • Project Team	Costing options identified; possible system modifications identified	March 2003	Team will coordinate with both the Planning priority and the Performance Measurement priority. Method of costing activities should support recommendations of the Performance Information priority. Note that two team members are attending a 2-day training session, "Activity Based Costing in the Public Sector."
Assess cost/benefit of providing this type of costing information. Submit analysis to EXCOM for approval and support.	Decision on implementing new costing methods • Project Team • EXCOM	Analysis report submitted to EXCOM; decision made	TBD	Primary focus now directed at financial reporting.

Key Activities	Expected Outcomes • Target Audience	Performance Measures	Milestones	Actions / Progress to Date
Based on cost/benefit analysis, develop approach to implementing cost accounting at ACOA.	Enhanced decision-making • Agency managers and staff	New information/reports available for management to manage budgets	TBD	N/A

Low-Hanging Fruit

STATUS	
Completed	**Install suggestion boxes in all regions and branches to provide a mechanism for employees to suggest improvements in work processes, management, etc. Investigate possible rewards for adopted suggestions** The ACOA Suggestion Box was launched by the President on April 9, 2003.
Completed	**Inclusion of financial and non-financial operating goals and measures in performance agreements** Memorandum to EXCOM on April 17, 2003 providing examples of the type of Key Goals and Performance Measures that could appear in EXCOM Performance Management Agreements with the President as well as in the Performance Appraisals of EXCOM managers.
Completed	**Review current Values and Ethics document, revise as necessary and reissue to all staff** Code of Professionalism document was reviewed and reissued to all staff. Public Service Code of Values and Ethics provided to all staff.
Completed	**Ensure that all employees receive an annual performance review** Issue page prepared for Excom (November 19 2002 meeting) reinforcing requirement for performance reviews and also to amend the due date to April 30 from June 30. Last year, more than 70 % of employees received their performance review by the end of June.
Completed	**Develop a Manager's Handbook** Handbook was posted on MBM Intranet site. E-mail from President to all staff was sent on February 3, 2004.
Completed	**Prepare Corporate Services Directory** Being edited.
Completed	**Review and revise New Employee Information Kit** New Employee Information kit completed and available on the Agency intranet site.
Completed	**Inventory of Training and Development courses for managers** Inventory has been posted on the Human Resource intranet site.

Completed	**Develop a kit for new Account Managers** Circulating for approval.
Ongoing	**Conduct wellness seminars as appropriate (Workplace Well Being Committee)** Eight ACOA representatives participated in the "Occupational Health and Safety and Return to Work Implementation Strategies for Federally Regulated Workplaces" Conferences and Workshops in Ottawa in the Fall of 2003. A HO Workplace Well Being Committee is being proposed for creation, separate and distinct from the Occupational Health and Safety Committee. This committee will focus solely on activities to improve well-being in the workplace. Two groups have been formed to take part in the *Stepping Out Moncton* campaign. Sessions have been held with these groups.
Completed	**Reward consistent high performers instead of only the one-time "special project" high performers** Ensured that current reward and recognition mechanism is met this objective. This year's recipients for the Outstanding Achievement Awards were consistent performers.
Ongoing	**Continue to update and review the MBM intranet site**
Completed	**Post Capacity Assessment Final Report on Agency's Internet site**
TBD	**Assess the need for standards for functional specialists' internal service delivery (see Priority Area 9)**
Ongoing	**Human Resource could be more proactive in ongoing liaison with regions to seek out issues or needs with regards to classification, staffing, etc.** HR has held various information sessions throughout the Agency. The first ACOA Human Resource Conference was held in June 2003.
Ongoing	**Need to educate and train staff on the information and tools available in the Agency and identify gaps** Survey was conducted by Human Resource to identify training needs. Some training sessions have been held throughout the Agency (i.e. Governance sessions) and others will be organized on a needed basis.

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Completed (FIS) Reporting (TBD)	**Prepare annual reports on the Agency's financial and non-financial performance using FIS compliant statements. Present these reports as public information.** Statements are FIS compliant. Waiting for direction from TBS for public reporting.