Strategic Initiatives Component

Canada Cultural Investment Fund

Table of contents

    Please refer to the Glossary for the definitions of underlined words in this document.

Guidelines - Strategic Initiatives

1. Objectives of the Canada Cultural Investment Fund

The objectives of the Canada Cultural Investment Fund (CCIF) are to support arts and <u>heritage organizations</u> in diversifying their revenues, to strengthen their organizational and management capacities and to help them be better rooted and recognized in their communities.

The CCIF program has four components that work together in achieving these objectives: Endowment Incentives, Cultural Capitals of Canada, Limited Support to Endangered Arts Organizations, and **Strategic Initiatives**.

1. 1 *Objectives of Strategic Initiatives*

Strategic Initiatives provides financial assistance for <u>projects</u> involving multiple <u>partners</u> that will help arts and <u>heritage organizations</u> strengthen their management abilities, make strategic use of new technologies and diversify their revenues. By supporting collaborative <u>projects</u>, Strategic Initiatives encourages knowledge and resource sharing that will improve the business operations of arts and <u>heritage organizations</u> and help them make stronger contributions to Canadian society and the economy; and that will advance cultural development at the local level.

2. Applicant eligibility

The project lead is the organization that completes the funding application on behalf of multiple <u>partners</u> for the purpose of delivering a specific project. The project lead is also legally responsible for the management of the project and administration of any funding received from the Department of Canadian Heritage, and must satisfy the following eligibility conditions.

2.1 *Eligible applicants*

To be eligible an applicant must:
- be a professional non-profit organization, association, institution, or foundation incorporated under the *Canada Corporations Act*, Part II or provincial or territorial legislation, or a First Nations, Inuit or Métis organization;
  - administered by an active board of directors, working professionally and continuously for three years prior to the application date;
  - with a mandate related to the arts or heritage sector; and
  - with <u>activities</u> and programs that include the arts or heritage;

or
- be a postsecondary education institution or a <u>heritage organization</u> created by another level of government:
    - with distinct objectives, programs and budgets related to the arts or heritage;
    and
- employ the equivalent of at least two full-time employees; and
- not have an accumulated <u>deficit</u> of 15% or more over total revenue for the previous year.

2.2 *Ineligible applicants*

The <u>cultural industries</u> and their associations benefit from assistance offered by other programs and initiatives of the Department, and are therefore ineligible for this component. Federal agencies, other Federal departments, provincial arts councils and Crown corporations are also ineligible.

The national training schools, the presenters, the festivals and their networks are supported under the Canada Arts Training Fund and the Canada Arts Presentation Fund. While these organizations are not eligible as lead applicants, they will be considered eligible as <u>partners</u> for the Strategic Initiatives component. This approach is intended to ensure greater consistency in streamlining Canadian government support to organizations.

3. Project eligibility

3.1 *Project eligibility and examples of eligible projects*

To be considered eligible, <u>projects</u> must:
- involve the collaboration of at least three <u>partners</u> to carry out the project;
- have a broad impact and be of direct benefit to a number of non-profit organizations working in the arts and/or heritage sector in Canada;
- work in the areas of <u>activity</u> targeted by the program; and
- have measurable <u>outcomes</u> in accordance with the component's objectives (section 1.1).

Note: Members of associations or organizations are not considered <u>partners</u> unless they contribute financial or <u>in-kind</u> resources to the project. Please consult the definitions of <u>partner</u> and <u>partnership</u> in the Glossary.

Targeted areas of activity:

1. Revenue diversification
2. Advancement of business practices in the digital age
3. Marketing and market development
4. Sharing of best practices
5. Improvement of business model
6. Professional development
7. Enhancing the arts and heritage sector's analytical abilities to introduce more efficient business and organizational management practices
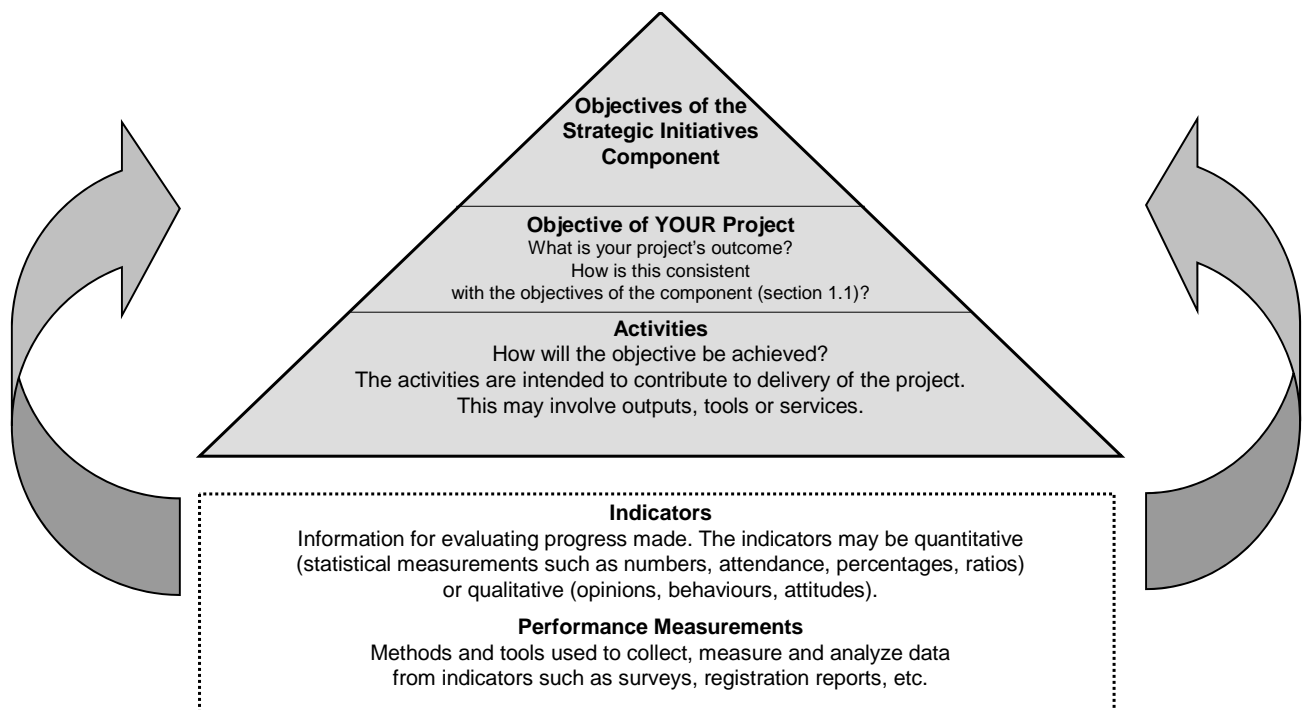
Examples of projects:

- Co-operative ventures to offer online ticket purchasing and computerized sales reports
- Mobile marketing, social media initiatives and online marketing strategies
- Joint marketing and cross-promotional initiatives involving a range of organizations covering a large geographic area
- Development and pooling of tools or <u>activities</u>, such as Web seminars, to enhance the management effectiveness of organizations
- Design and delivery of professional development <u>activities</u> for administrators of arts and <u>heritage organizations</u>, or for municipal cultural workers
- Research and studies on issues affecting the arts and heritage sector with the consecutive implementation of a strategy that will strengthen the ability of organizations to respond to challenges and change.

3.2 *Project's performance measurement*

The objectives of the project must be aligned with the objectives of Strategic Initiatives (see section 1.1). As demonstrated in Figure 1, a <u>performance measurement</u> plan will be used to ensure that the objectives of the <u>project</u> have been met.

The CCIF program will compile a series of <u>performance indicators</u> listed in the beneficiaries' reports. Though not exhaustive, it will include data for evaluating <u>projects,</u> such as the number of organizations that have access to <u>activities</u> or tools, the number of newly established <u>partnerships,</u> and the diversity of funding sources. Examples of possible <u>performance indicators</u> are available in the Glossary.

Figure 1: Objectives of Strategic Initiatives

Objectives of the Strategic Initiatives Component

Objective of YOUR Project
What is your project's outcome?
How is this consistent
with the objectives of the component (section 1.1)?

Activities
How will the objective be achieved?
The activities are intended to contribute to delivery of the project.
This may involve outputs, tools or services.

Indicators
Information for evaluating progress made. The indicators may be quantitative
(statistical measurements such as numbers, attendance, percentages, ratios)
or qualitative (opinions, behaviours, attitudes).

Performance Measurements
Methods and tools used to collect, measure and analyze data
from indicators such as surveys, registration reports, etc.

3.3 *Eligible expenses*

Only expenses directly related to the project are eligible. These include but are not limited to the costs associated with the implementation of project activities, and the development of tools for measuring the impact of the project. The notes to the Budget Template give further details on eligible expenses.

Note: The amount requested for administrative fees cannot exceed 15% of the total cost of the project; and employee salaries must not be more than 20%, established on a pro rata basis for the duration of the project.

3.4 *Ineligible expenses*

The financial support offered under Strategic Initiatives only funds time-limited projects and may not be used to cover operating expenses. Expenses incurred by the applicant prior to the application date are not eligible and cannot be reimbursed.

Ineligible expenses include:
- wages and benefits of employees who do not contribute directly to the project
- funding intended to reduce deficits
- hospitality expenses (except for small gifts to Elders)
- artistic creations, artistic and heritage production and programming
- travelling exhibitions and touring costs
- feasibility studies for infrastructure and capital projects
- purchase of furniture
- costs of producing the applicant organization's audited financial statements

4. Funding

Financial support under Strategic Initiatives is non-recurrent. Depending on the nature of the project, however, multi-year funding may be considered. The applicant must demonstrate that it has a stable structure, governance and financial status; and that there is a need for a multi-year commitment.

4.1 *Maximum funding*

The maximum amount of funding available is $2 million per fiscal year. Funds are paid through grants or contributions depending on the scope of the project, the amount requested and the Department's risk assessment.

Financial support by the Department may support up to 50% of eligible project costs. Under exceptional circumstances, the program may consider increased levels of support up to 75% toward eligible project costs. Exceptional circumstances are determined by the Department and may include projects benefiting rural or remote areas, or underserved populations, such as Aboriginal communities, youth and official-language minority communities, where the need is clearly demonstrated and justified.

5. Two-step application process

5.1 *Step 1: Letter of Intent*

An organization interested in receiving funding under Strategic Initiatives must first submit an overview of the proposed project. This must include all the documents listed in the Checklist in section C of the Step 1: Letter of Intent.

The Department will evaluate the Letter of Intent before inviting the organization to submit a Detailed Application. Please refer to section 6 for the evaluation criteria.

Note: Additional information may be requested if needed. An invitation to submit a Detailed Application does not guarantee approval of the project at Step 2.

Before submitting a Letter of Intent, please contact a CCIF Program Officer to discuss the nature of the project.

<div align="center">

Canada Cultural Investment Fund
Department of Canadian Heritage
Terrasses de la Chaudière
25 Eddy Street, 13th Floor, room 295 (25-13-V)
Gatineau, Quebec
K1A 0M5
Tel.: 819-997-3955
1-866-811-0055
Fax: 819-994-6249
fcic-ccif@pch.gc.ca

</div>

5.1.1 *Deadline*

Please refer to the Strategic Initiatives website for the deadline to submit a Letter of Intent.

The program uses the application postmark or delivery receipt as proof that the Letter of Intent was received on or before the deadline. Incomplete files, or files received after the closing date, will not be considered.

5.1.2 *Processing time*

The CCIF program will acknowledge receipt of Letters of Intent within 15 calendar days.

The time it takes to process a proposal depends on the volume of the submissions received. The program goal is to notify all applicant organizations in writing of the outcome of the evaluation of Letters of Intent within two months.

5.2 *Step 2: Detailed Application*

Strategic Initiatives will invite organizations whose proposals have been recommended to submit Detailed Applications. Each funding application will be reviewed by program staff, and must include all the documents listed in the Checklist in section D of the Step 2: Detailed Application form.

5.2.1 *Deadline*

The deadline for submitting the Detailed Application will be specified in the invitation letter. Each organization will have at least two months to submit the necessary documents.

5.2.2 *Processing time*

The CCIF program will acknowledge receipt of Detailed Applications within 15 calendar days.

The time it takes to process an application depends on the volume and complexity of the projects. The program goal is to issue official written notification to all applicants of the funding decisions for Detailed Applications within five months of the deadline date.

Note: Additional information may be requested to complete the evaluation of the project. Failure to provide the requested information within 15 calendar days of the date of the request will result in a delay of consideration for funding or may lead to the closure of the file.

6. Evaluation criteria

All projects will be evaluated against the following criteria. The scores for Step 1 and Step 2 are not cumulative.

6.1 *Step 1: Letter of Intent*

Evaluation criteria

Relevance of project (35%)
- The project is consistent with the objectives of Strategic Initiatives (section 1.1).
- There is a clear demonstration that the project responds to the needs of organizations that will benefit directly from its activities.
- The project addresses important issues and opportunities.

Anticipated impact of project (25%)
- Targeted outcomes are defined and measurable.
- The project will benefit multiple organizations in the arts and heritage sector in one or more areas identified by Strategic Initiatives.

Partnerships (20%)
- The number of partners and their expected degree of involvement will contribute to the success of the project.
- The anticipated level of financial contribution from the partners and other supporters shows a commitment to the delivery of the project.
- The expected sharing of expertise, talent, and financial and other resources for implementing the project is adequate.

Applicant's ability to carry out the project (15%)
- The lead applicant's <u>financial statements (audited if available)</u> demonstrate financial stability.
- The applicant has sufficient resources to manage its regular <u>activities</u> while engaged in the <u>project</u>.

Funding (5%)
- The funding requested for the <u>project</u> represents a reasonable percentage of total <u>project</u> costs.
- The expenditures of the <u>project</u> will not negatively affect the financial situation of the lead applicant.

6.2 *Step 2: Detailed Application*

Step 2 applies only to <u>projects</u> that have been recommended at Step 1.

Evaluation criteria

Project quality (30%)
- The <u>project</u> is based on an analysis of needs and issues.
- There are sufficient, qualified human resources assigned to deliver the <u>project</u>.
- The <u>project</u> schedule and structure are realistic and clear.

Anticipated impact of project (25%)
- The target <u>outcomes</u> are defined and measurable.
- The <u>performance measurements</u> and <u>indicators</u> are defined and appropriate.
- The <u>project</u> will directly benefit multiple organizations.
- The <u>project</u> will have a <u>sustainable impact</u> on the organizational and financial stability of arts and <u>heritage organizations</u>.
- The communication plan of the <u>project</u> is effective.

Partnerships (20%)
- The number of <u>partners</u> supporting the accomplishment of the <u>project</u> is appropriate.
- The selected <u>partners</u> are relevant to the nature of the <u>project</u>.
- The level of financial contribution from the <u>partners</u> and other supporters shows a commitment to the delivery of the <u>project</u>.
- The sharing of expertise, talent, and other resources for implementing the <u>project</u> is adequate.

Evaluation of applicant organization (15%)
- The choice of the organization leading the <u>project</u> is well founded.
- The organization is professionally managed.
- The organization demonstrates financial stability.
- The funding history from the Department or other funders illustrates responsible use of public funds.

Budget (10%)
- A variety of revenue sources will contribute to <u>project</u> delivery.

- A percentage of funding is already confirmed.
- The expenses are justified for the planned <u>activities</u>.
- The expenses are realistic and reasonable.

7. Access to information and privacy

Certain information that you provide in the Letter of Intent and the Detailed Application may be made public in accordance with the provisions of the *Access to Information Act* and the *Privacy Act*.

8. Obligations of future recipients

Organizations whose <u>projects</u> receive support under Strategic Initiatives will be required to meet certain obligations. Please see the *Guide to Reporting Responsibilities and Obligations to the Department of Canadian Heritage*.

Guide to Reporting Responsibilities and Obligations to the Department of Canadian Heritage

Information for organizations with projects supported under the Strategic Initiatives component of the Canada Cultural Investment Fund (CCIF).

1. Responsibilities

Funding for an approved project will be in the form of either a contribution or a grant and will be administered through an agreement between the Department and the recipient organization. This agreement will outline the reporting requirements to be fulfilled by the recipient until the project is completed. These requirements will provide for effective project monitoring and management to maximize the attainment of results, thereby ensuring that public funds are used appropriately.

2. Types of funding

2.1 Grant

Methods of payment

A grant may be allocated as a single payment or be broken down into two or more payments, depending on its value and duration. The grant is not subject to being financially accounted for by a recipient and is not normally subject to audit by the Department. The recipient's ongoing eligibility may be verified.

Reports required

As indicated in the grant agreement, the recipient organization must submit a report on results after completing the project. This report will be used to identify measurable and tangible impacts resulting from the federal investment.

2.2 Contribution

Methods of payment

The terms and conditions of a <u>contribution</u> agreement provide for two possible methods of payment: advance payment and reimbursement of expenses.

- *Advance payments* are made before the project takes place and reflect the financial needs of the organization for a given period.

- *Reimbursements* are made for eligible <u>project</u> expenses that have already been incurred under the <u>contribution</u> agreement. The reimbursement is conditional upon the receipt and approval of all reports required by the Department.

Reports required

As indicated in the <u>contribution</u> agreement, the recipient organization must submit <u>activity</u> and financial reports to receive payment. At the end of the <u>project</u>, the recipient must also submit a final financial report with detailed information on how the funding was used, and a final <u>activity</u> report on the results obtained.

<u>Audited financial reports</u> of <u>project</u> revenues and expenditures are required for <u>contributions</u> of $200,000 or more. In this case, the cost of the <u>project</u> audit will be considered as an eligible expense.

Failure to submit a final report for <u>projects</u> funded previously by the Department will be taken into consideration when assessing new applications and could be cause for rejection of an application in the future.

3. Recipient audits

The Minister reserves the right to audit the accounts and records of the recipient organization for five years after the expiration of the <u>agreement</u> between the organization and the Department. If it can be demonstrated that a recipient provided false information, all or part of the amount received from the Department will have to be returned and the organization may be declared ineligible for future funding.

The recipient commits to abide by general accounting practices and principles, and to keep and provide to departmental representatives, for review and audit, its books, accounts and records for all revenues and expenditures associated with the <u>project</u> funded under the <u>agreement</u>. The recipient must also keep a detailed record of the value of <u>in-kind</u> contributions. Accounting records and the supporting documents must clearly distinguish between <u>project</u> expenditures and the organization's operating expenditures.

4. Public acknowledgement of funding by recipients

All recipients must acknowledge having received funding from the Department of Canadian Heritage to demonstrate the use of public funds. Various opportunities can be taken to mention federal assistance, such as during the project launch, opening ceremony or project wrap-up, during interviews with journalists, or in news releases and promotional material.

Guidelines for acknowledging funding can be found at www.pch.gc.ca/pc-ch/peaf-pafa/index-eng.cfm. Applicants may also contact the headquarters of the Department of Canada Heritage or call the toll-free number at 1-866-811-0055. In acknowledging funding, recipients must also follow the rules governing official departmental logos, which can be found at www.pch.gc.ca/signatures/index-eng.cfm.

5. Access to information

The *Access to Information Act* gives Canadian citizens the right, except in limited and specific circumstances, to examine or obtain copies of records held by federal government institutions. The *Privacy Act* establishes a similar right of access to records containing personal information, which are held by federal government institutions in accordance with the principles that personal information should be available to the individual to whom it relates, and that necessary exemptions should be limited and specific. Please visit the website at www.pch.gc.ca/pc-ch/publctn/aiprp-atip/rapport-report-ati-eng.cfm.

6. Public information

The CCIF will publish an annual list of all recipients and the approved amount of funding on its website. This information will be disclosed without the prior consent of the recipients.

7. Official languages

Depending on the nature and scope of the project funded by the Department of Canadian Heritage, recipients will be subject to compliance with the *Official Languages Act*. The terms and conditions of compliance will be detailed in the grant or contribution agreement. At a minimum, the recipient will ensure that acknowledgement of the Department's support for the project is expressed in both English and French. For more information, you may consult Part VII of the *Official Languages Act* (R.S.C., 1985, c. 31 (4th Supp.)) at http://lois-laws.justice.gc.ca/eng/acts/O-3.01/page-10.html.

8. Conflict of interest

Recipients will be required to indicate that any former federal public office holder or federal public servant who is employed by the organization is in compliance with the post-employment provisions of the Government of Canada's *Values and Ethics Code for the Public Service* or the *Conflict of Interest and Post-employment Code for Public Office Holders*.

Glossary – Strategic Initiatives

For the purposes of the Strategic Initiatives component, the following definitions apply.

Activity: An operation or work process internal to an organization, intended to produce specific <u>outputs</u> such as goods or services. <u>Activities</u> are the primary link in the chain through which <u>outcomes</u> are achieved.

Agreement: See Contribution (agreement) and Grant (agreement).

Audited financial report: An audited <u>financial report</u> is prepared by an independent accounting firm and includes all of the revenues realized and expenditures incurred by the applicant in the delivery of the project. It is required for contributions of over $200,000.

Cash flow statement: A financial management tool used to examine future budget needs and ensure that actual revenues and expenditures are in line with forecasted revenues and expenditures during the <u>project</u> period. The program uses this information to align its disbursements to the cash requirements of the <u>project</u>. Cash flow statements will often need to be revised during a <u>project</u>.

Consultants: Individuals or groups of individuals with specialized knowledge and/or skills. They are not part of an arts or <u>heritage organization</u>'s staff, but rather are contracted for a fee to provide specific services to an organization. These services may include board development, strategic or business planning, marketing, communications, outreach, fundraising, or human resource policy development or training.

Contribution (agreement): A legal agreement between the Department and a prospective recipient of a contribution that describes the obligations of each. The contribution as such is a conditional transfer payment to an organization for specified purposes pursuant to an agreement that is subject to audit and review.

Creation/Production: Research or artistic <u>activity</u> leading to the production of a new or substantially revised artwork, for example, a play, choreography, show, piece of music, script, sculpture, video, installation or exhibition. The end product is owned by the artist, the arts organization or the heritage institution. Expenses related to creation and programming are not eligible for funding under this component.

Cultural industries: The Department defines cultural industries as book and magazine publishing, and music, interactive digital media, and film and television <u>production</u>. Applicants from the cultural industries are not eligible for funding under this component.

Deficit: A deficit occurs when, in any fiscal year, the expenditures of an organization exceed its revenue.

Elders: Individuals in Aboriginal communities respected for their knowledge who are invited to participate in discussions to share that knowledge and transmit the spirit of the traditions.

Financial statements: A series of financial documents (balance sheet, operating statement, cash flow statement) that provide a general overview of the financial viability and management capacity of an organization. Financial statements are useful to programs in two ways: they make it possible to analyze financial viability when evaluating an applicant's funding application, and to confirm its associated revenues and expenditures after a project receives a contribution. Financial statements may or may not have been audited.

a) Audited financial statements
Audited financial statements indicate that an organization has developed its own financial statements and then submitted them to an independent accounting firm to be audited. This involves an accountant examining evidence from within and from outside the organization to verify the amounts in the statements and to gauge whether estimates made by the organization are reasonable. Audited financial statements offer a higher level of assurance than unaudited statements.

b) Review engagement report
The review engagement report made by a chartered accountant attests that the accountant did not find elements challenging the legality, fairness of financial statements, financial condition or results at the end of the fiscal year. In general, these processes are confined to inquiries, analytical procedures and interviews with management. The review engagement is not a true audit, but it enables a conclusion to be made on whether the evidence considered is plausible under the circumstances. The review engagement provides a moderate level of assurance compared to audited financial statements.

Grant (agreement): A legal agreement between the Department and a prospective recipient of a grant that describes the obligations of each. A grant as such is a transfer payment made to an organization that is not usually subject to audit mechanisms, but for which eligibility and entitlement may be verified and for which the recipient is subject to pre-conditions. The recipient will be asked to report on results achieved.

Heritage organizations: For the purposes of the Department of Canadian Heritage, heritage organizations have a mandate to collect, preserve, interpret, and present collections to the public and may include museums, archives, heritage centres, historic and natural heritage sites and libraries. The International Council of Museums defines a museum as a non-profit, permanent institution in the service of society and its development, open to the public, which acquires, conserves, researches, communicates and exhibits the tangible and intangible heritage of humanity and its environment for purposes of education, study and enjoyment.

In-kind: Materials or services donated by third parties or donated by the applicant. They are considered a real contribution to the total cost of the proposed activities of the project, but it is not reimbursable, as no money has changed hands. Donated materials and services may be eligible as in-kind contributions if they:
- are eligible under the component guidelines, and essential to the project's success; and would otherwise be purchased or paid for by the recipient;

- can be measured at fair market value at the date of contribution—for example, fair value could be determined in relation to the purchase of equivalent materials and services; and
- are recorded in the recipient's records with appropriate supporting documents—for example, proof of hours worked by volunteers.

Management letter: A letter from a chartered accountant that normally accompanies audited <u>financial statements</u>. Based on the chartered accountant's audit and analysis of the organization's financial records and statements, this letter communicates observations of particular interest to the organization's management.

Outcomes: Effects or consequences of <u>projects</u> that may occur within organizations, communities or individuals. They may relate to behaviour, skills, knowledge, attitudes, values, conditions or other attributes resulting from an effort to attain a goal. They must be measurable and directly related to the objectives, <u>activities</u> and <u>outputs</u> of the <u>project</u>.

Outputs: The most immediate effects of a <u>project</u>, usually involving the creation of goods and/or services.

Partner: An organization that agrees to pool efforts and resources with others with the goal of achieving a common objective, while maintaining its independence. The objective is related to a clearly identified problem or need in which the parties involved have a common interest, responsibility or motivation. Partners will include non-profit organizations, public institutions, the private sector and various levels of government. Organizations are not recognized as partners unless they contribute directly in cash or in kind to the accomplishment of the <u>project</u>

Partnership: An arrangement between two or more parties who have agreed to work cooperatively toward shared and/or compatible objectives, in which there is shared authority and responsibility for the delivery of programs and services, in carrying out a given action, or in policy development; joint investment of resources (time, work, funding, material, expertise, information); shared liability or risk-taking; and, ideally, mutual benefits.

Partnership agreement: An agreement binding the parties for delivery of a <u>project</u>. The partnership agreement is negotiated according to the requirements of each organization involved; however, it must be binding on all parties and must contain the following:
- the general terms and conditions of the agreement;
- an acknowledgement of the organization's role in being responsible for the <u>project</u>;
- a detailed description of each <u>partner</u>'s role and contribution (cash or <u>in-kind</u>) to the <u>project</u>;
- the indemnification and liability of each <u>partner</u> signatory to the agreement;
- the obligations of each <u>partner</u> to provide <u>activity</u>, financial or other reports to comply with the contractual obligations to the Department and other bodies;
- an assurance (if applicable) that each <u>partner</u> has obtained the required ethics approvals; and
- the dispute resolution mechanisms.

(Performance) indicator: Data that can be used to determine whether a <u>project</u> has achieved its intended qualitative and quantitative results; and, if so, to what degree.

<u>Performance indicators</u> should capture the most significant information. They must be reliable and cost-effective. To select the appropriate performance indicators, these questions should be asked:
- Is it accurate? Will it measure the expected result?

14

- Is it a cost-effective means of collecting data?
- Can the information be obtained without infringing on privacy issues?
- Does the information assist the project manager in understanding the types of impact the project will have on arts and heritage organizations?
- Does it capture useful information that will assist the organization in making management decisions?
- Will the information be communicated easily to interested parties, including funding organizations?
- Will the information allow for a meaningful comparison between data prior to and after project completion?

Examples:

a) Quantitative performance indicators
Data that can be used for evaluating progress made during a project. Quantitative performance indicators are expressed as statistical measurements such as numbers, percentages, or ratios, such as the:
- number of participants at an activity, or users of tools
  - If the project targets a specific audience, such as Aboriginal, youth, rural/remote, official-language minority or culturally diverse communities, identify the number of participants from the targeted community and/or the percentage of participants from the targeted community compared to the total number of participants.
- number of new clients and/or new markets
- origin/location of audiences/users/participants (geographical or digital)
- number and type of professional development activities (conferences, networking events, workshops, etc.)
- number of members and percentage of membership renewals
- number of online ticket purchases
- number and type of Web 2.0 initiatives developed and used, such as:
  - social media (number of fans, followers, comments/discussions)
  - videos (number of hits, popularity index)
  - blogs (number and duration of visits, sharing statistics)
- number of podcasts and downloads
- number of software/applications developed
- number of online training activities developed (webinars, online tests, etc.)
- number of services offered by the lead applicant
- number and type of strategies developed to encourage partnerships with the private sector
- level of training provided/made available (advanced, intermediate, basic)
- number of hours of training
- number and type of organizations that participate in professional development activities
- number of planning tools/best practices implemented by organizations that will benefit from the project

b) Qualitative performance indicators
Information that can be used to evaluate progress made during a project. Qualitative indicators are expressed as opinions, behaviours or attitudes. Whenever possible, these performance indicators are generalized by the use of a rating scale, for example, research quality is rated as excellent, average, or below average:

- level of satisfaction
- opinions of participants indicating that they have learned a great deal on a given subject
- comments by participants indicating that tools developed could be implemented in their workplace
- summary of consultations undertaken by the client and <u>consultant</u> to identify the issue; appropriate course of action and results
- observations from the participants on how the <u>activity</u> has led to positive change in their workplace/professional development
- opinions of participants regarding the usefulness and/or relevance of the <u>activity</u>/tool

Performance measurement: The process and systems of selection, development and ongoing use of <u>performance indicators</u> to guide decision-making throughout a <u>project</u>. Performance measurement refers to the notion of continuous improvement. Methods and tools used to collect, measure, and analyse data include the following:
- quantitative data collection
- focus group
- evaluation group / expert panel
- survey (to measure satisfaction)
- analysis tools: Web analytics
- literature review
- case study
- press review
- interviews

Project: The Treasury Board Secretariat defines a <u>project</u> as a set of <u>activities</u> or functions that a recipient proposes to undertake with the <u>contribution</u> funds provided by a department. A project has the following characteristics: it has a one-time set of <u>activities</u> or events; it has defined start and end dates; it has a set of objectives that are designed to be completed within the scope of the project; it includes an <u>activity</u> or <u>activities</u> designed to achieve project objectives; and it is delivered by a recipient, not a federal government department or agency.

Remote region: A community with a population of less than 50,000 which is located between 50 and 200 kilometres from an urban centre with a population over 100,000.

Rural region: A community with a population of less than 50,000 which is located more than 200 kilometres from an urban centre with a population over 100,000 or a provincial capital.

Sustainable impact: A change effected after completion of a <u>project</u> – for example, the organizations continue to share what they have learned, a change of attitude has been made in the community, or a model has been repeated by organizations that were not initially involved in delivery of the <u>project</u>.