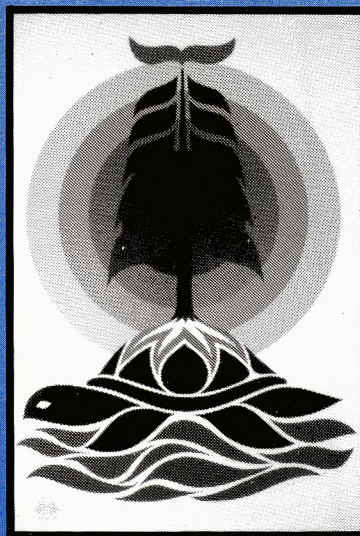
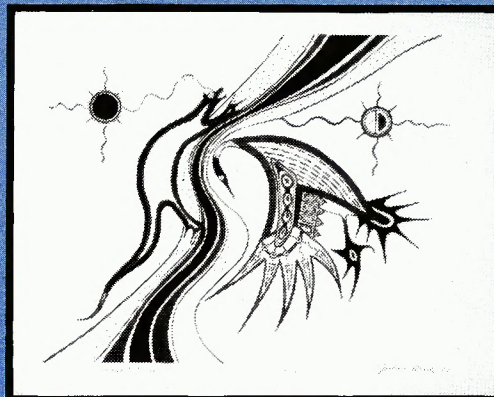




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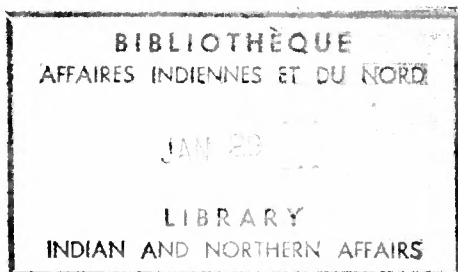
REVIEW OF ADVISORY SERVICES:  
CANADIAN EXECUTIVE SERVICES  
OVERSEAS (CESO) AND INDIAN  
MANAGEMENT ASSISTANCE PROGRAM

July 1985

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Review of advisory services:  
Canadian Executive Services

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Submitted to:

Evaluation Branch  
Corporate Policy  
Indian and Northern Affairs

Prepared by:

The Bureau of Management Consulting  
Supply and Services Canada

REVIEW OF ADVISORY SERVICES:  
CANADIAN EXECUTIVE SERVICES  
OVERSEAS (CESO) AND INDIAN  
MANAGEMENT ASSISTANCE PROGRAM

July 1985

## EXECUTIVE SUMMARY

The Department of Indian Affairs provides advisory services to Indian people through services contracts with Canadian Executive Services Overseas (CESO) and with the University of Western Ontario's Indian Management Assistance Program. This executive summary and the report reviewing these two advisory service contracts are organized in two separate parts.

### **I. CESO ADVISORY SERVICES**

Indian and Northern Affairs Canada (INAC) maintains an agreement with Canadian Executive Services Overseas (CESO) for the provision of management advisory services to Indian people. In preparation for the development of a new master contract in 1986, a review has been undertaken to determine whether the arrangement with CESO should be continued, and if so, under what conditions. This review of CESO is a final outcome of the overall review of advisory services commenced by the Program Evaluation Branch of INAC in mid-1984.

The analysis undertaken was based on four components:

- the initial survey of all advisory services which involved interviews with INAC staff in all program areas at NHQ and one Regional Office;
- a preliminary review of CESO based on interviews with CESO and representatives at INAC Regions which resulted in a discussion paper;
- comments from representatives of CESO and INAC Regions in response to the discussion paper;
- a review of the findings and issues raised in a client survey undertaken by CESO in 1983.

It was discovered that CESO is considered a valuable resource both by Indian people and by INAC field staff, particularly those working in the economic development. However, there are a number of issues which require resolution or attention by INAC and CESO to improve the service or the contractual arrangement between the two parties. The recommendations arising from these areas for improvement are as follows:

- i) the funding arrangements between INAC and CESO should be based upon explicit performance expectations for CESO. (p. 15)

- ii) prior to establishing a performance-based funding system, INAC should ensure that the CESO head office overhead expenses allocated to the Department are clearly attributable to functions related to the INAC contract and are considered to be priority activities. (p. 15)
- iii) in consultation with INAC and Indian people, CESO should establish a mechanism for increasing the input of Indian people in the management of the Canadian Native Program in a manner suitable to the achievement of Indian goals. (p. 16)
- iv) CESO should establish a general policy of involving regional Indian representatives in such activities as identification of projects and orientation of volunteers. (p. 16)
- v) INAC and CESO should develop a special recruitment program, on a trial basis for one year, in areas where problems in volunteer recruitment are reported. (p. 17)
- vi) INAC and CESO in consultation with Indian people, should jointly develop an orientation program for new CESO volunteers and INAC should fund the program specifically for a trial period of two years. (p. 17)
- vii) for most, if not all projects, terms of reference agreed to by the CESO volunteer, the INAC Regional Office and the Indian client should be established for each CESO project of advisory service. (p. 19)
- viii) a brief formal project close-out including a statement of activities and results by the CESO volunteer and an evaluation of the service by the Indian client should be established. (p. 19)
- ix) INAC should review project close-out documents provided by CESO to ensure that, wherever possible, an arrangement for follow-up with CESO clients is made. (p. 20)
- x) national operational guidelines should be developed and applied, as appropriate, especially for reports to INAC headquarters from CESO regions. (p. 20)
- xi) arrangements should also be made to allow for regional flexibility and innovation, including some budgetary flexibility where this is required. (p. 20)
- xii) CESO reports to INAC should include performance-based information to support its program expenditures and budget request as agreed to between the two agencies. (p. 21)

- xiii) the wide range of expertise potentially available through CESO advisory services should be recognized, and all INAC program areas, including the Indian and Inuit Management Development Program (I/IMDP), should ensure that Indian clients are aware of the service and are encouraged to use it. (p. 22)

## II. INDIAN MANAGEMENT ASSISTANCE PROGRAM

Indian and Northern Affairs Canada (INAC) maintains an agreement with the University of Western Ontario's (UWO) School of Business Administration for the administration of the Indian Management Assistance Program (IMAP). Under this program, students are hired during the summer period to provide management and business advice to Indian business people, Tribal Councils and Bands.

This program was identified for review during a survey of advisory services provided by INAC across the Department in 1984. The Advisory Services Review Steering Committee agreed that an examination of the effectiveness of the program should be carried out. To conduct the study, interviews were undertaken with INAC regional IMAP co-ordinators and with Indian clients of the student consulting services.

It was discovered that the concept of a program providing academically qualified students as advisors to Indian people is generally well-received by both the client group and the INAC regions. It was felt that the current constraints on the program in terms of numbers of participating students, the summer time-frame and the business orientation should be lifted to increase levels of service under the program. Also, a mechanism within this program or another one for the recruitment and development of Native consultants from the student population should be considered.

Although the response to the program was positive, some review of the role played by UWO is required. It may no longer be appropriate to continue the week-long orientation program at UWO campus, given the travelling expenses for students from across Canada. Also, other components of the administration of the program should be reviewed to ensure that they are essential to the program and are being provided in the most cost-effective manner. With minor adjustments and modifications, IMAP can continue to provide valuable services to Indian people at a relatively low cost.

The recommendations arising from the study are as follows:

- i) a detailed review should be undertaken of various options for administration of IMAP. (p. 43)

- ii) the week-long orientation program for IMAP at UWO should be reviewed as to need, effectiveness and cost and other options for student orientation should be considered. (p. 44)
- iii) a program for the development of Native student consultant/advisors should be established to complement IMAP. (p. 45)
- iv) I/IMDP should ensure that IMAP is used to provide student consulting services to Indian clients, not to provide additional resources to INAC offices. (p. 45)
- v) the INAC Regional representatives for IMAP, in consultation with Indian organizations involved with the program, should undertake contingency planning to ensure the IMAP students are fully utilized throughout the summer period. (p. 46)
- vi) representative bodies of the clients served by IMAP students should be included as much as possible in all aspects of project and student management throughout the program cycle. (p. 46)
- vii) a written project description to serve as terms of reference between the IMAP student and the client should be developed for each project. (p. 47)
- viii) I/IMDP should consider expansion of IMAP to include student consultants of a senior academic level from a variety of different disciplines in accordance with identified needs in the Indian community and increase the total number of students in the program. Consideration should also be given to deploying students from co-op programs so the service could be provided on a year-round basis. (p. 48)
- ix) the student close-out report should be oriented to the client, taking the form perhaps of a report to the client and that a client report on the assistance received be instituted. (p. 48)
- x) I/IMDP should implement a form of reporting on IMAP from Regions to assist NHQ in assessing the levels of activity and results on an on-going basis. (p. 49)

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## REPORT OVERVIEW

The Department of Indian Affairs provides advisory services to Indian people through service contracts with Canadian Executive Services Overseas and with University of Western Ontario's Indian Management Assistance Program. This report reviewing these two advisory services contracts is organized in two parts.

**PART I**

**CESO ADVISORY SERVICES**



## I. CESO ADVISORY SERVICES

### INTRODUCTION

#### A. BACKGROUND

This part of the report is the result of a review of advisory services which began in mid-1984 at the request of the Program Evaluation Branch of Indian and Northern Affairs Canada (INAC). This review took place in several phases. The first phase examined the nature and extent of advisory services provided to Indian clients by various programs across the Department. From this overview, it was identified that the advisory services contracted by the Department from Canadian Executive Services Overseas (CESO) and the Indian Management Assistance Program (IMAP), directed by the University of Western Ontario's (UWO's) School of Business Administration, were the only advisory services that were sufficiently distinct from on-going program operations to warrant an independent review. This part of the report documents the analysis undertaken of CESO advisory services. Part II of the report has been prepared for the IMAP activities.

This study of CESO (and the study of IMAP) have been carried out under the direction of an Advisory Services Review Steering Committee chaired by Program Evaluation Branch of INAC (Appendix A lists members of this Committee). This committee has reviewed and confirmed the major issues of concern discussed in this report.

Since CESO had undertaken a study involving input from CESO clients in 1983, it was decided that the scope of this review would be restricted to in-person interviews and analysis of data at the CESO national and Ontario regional office and telephone interviews with a selection of additional CESO regional offices and INAC regional offices. These were carried out in late October and November, 1984, and an interim report was written and reviewed by the Steering Committee. The status report was distributed to CESO and to all INAC regional offices in late January, 1985 with a request for comments. This report outlines the issues that were raised in the course of the study and in the interim report, summarizes CESO and regional comments, and provides recommendations for the program arising from this review process. It should be noted that this review is based on perceptual data gained from a limited number of interviews with individuals involved with the CESO program.

## B. METHODOLOGY

The analysis contained in this report is the result of four study components. These components and the scope of work for each are discussed below.

### 1. Review of Advisory Services

In the review of all advisory services provided to Indian clients by Indian and Northern Affairs Canada, the following activities were undertaken for the CESO component:

- INAC program managers of CESO in the Indian and Inuit Management Development Program (I/IMDP) and Economic Development staff at NHQ were interviewed;
- in the context of the regional pilot review in Ontario Region, INAC managers of CESO in Economic Development were interviewed; and,
- the contribution arrangement with CESO and other documentation was reviewed.

After this first stage of the study, a number of issues for further review were identified, namely:

- the form and scope of CESO services;
- the degree of and mechanisms for Indian input in CESO;
- the nature of the consultant/client relationship;
- the perceived role of CESO in the development process;
- the availability of CESO services;
- administrative issues among the participant organizations and their various offices;
- the type of orientation program provided to new volunteers; and,
- whether alternatives exist, and at what cost.

### 2. Review of CESO Services

In the next phase, an analysis of CESO services was undertaken. This review consisted of:

- in-person interviews with CESO national and the Ontario regional office;
- telephone interviews with four CESO regional managers;

- in-person and telephone interviews with INAC staff in Economic Development and I/IMDP in five regions; and,
- review of existing data on costs and activities of the CESO program.

In the interviews, further information and views on the issues of concern identified in the earlier study were collected. The outcome of this phase was an interim report presented to the Advisory Services Committee in December 1984. This interim report was subsequently revised and issued to CESO and to all Economic Development and I/IMDP offices across the regions.

### 3. Interim Report Feedback

The third input to this report, then, is the comments received from CESO and the regions on the interim reports. These comments have been distilled into the discussion of issues as appropriate, or are highlighted where significant regional variations of approach or viewpoint were reported.

### 4. Review of Client Input

At the Advisory Services Review Steering Committee meeting in December, it was decided that no further data from clients of CESO would be collected at this time. Rather, the results available from a study contracted by CESO in 1983 would be accepted as a measure of client satisfaction for this review. These have then been taken into consideration in this report.

This report, then, summarizes and analyzes the findings with respect to CESO forthcoming from the four components of the study process.

## C. PRESENTATION OF REPORT

The first chapter of the report provides an overview of CESO: its objectives, activities, and current arrangements with INAC. The next chapter is a general assessment of the value of CESO services from the perspective of INAC, CESO clients, and a value for money analysis.

In the third and final chapter a review is undertaken of the issues affecting the CESO program. For each issue, there is a description, an outline of CESO and regional comments, and recommendations for both INAC and CESO, where appropriate.



## CHAPTER I

### OVERVIEW OF CESO

The Canadian Executive Services Overseas organization provides an advisory service to two major client groups: residents of undeveloped or underdeveloped countries, through CIDA-funding; and Canadian native people, primarily through INAC-funding (but also through contracts with other organizations). This chapter reviews the services provided by CESO to Indian people under its Canadian Native Program and, in particular, outlines the relationship between CESO and INAC for the provision of these services.

#### A. PROGRAM OBJECTIVES

The objective of the Canadian Native Program, as stated by CESO, is:

"To provide as a responsive program on a volunteer basis an advisory consultative service to all native people of Canada to assist their efforts toward achieving self-sufficiency as equal partners in Canadian society."

Within the INAC organization, CESO advisory service is administered by I/IMDP. Its placement there is to assist the management development program in achieving its goal of:

"Improving the capacity of native local governments to manage and administer their own affairs with generally accepted management practices and standards of service".

#### B. ORGANIZATION

CESO operates a national office in Toronto and regional offices in each Canadian province (except for Newfoundland and PEI), and supports two (a regional and a provincial) offices in Nova Scotia. Total staff for the native program is equivalent to approximately 12.5 full-time person-years. In addition, there are approximately 700 volunteers on the roster available for the provision of advisory services. Generally, the volunteers are contracted for specific projects or assignment work. In addition, the Alberta region assigns a single CESO worker to a band or group of bands to act as the prime volunteer providing liaison and on-going contact between CESO and the Indian band.

C. TYPES OF SERVICES

The volunteers providing advisory services for CESO are retired individuals with many years of expertise in their field. There is no restriction to entry into CESO, although many volunteers are recruited directly through service clubs or other networks by active volunteers. As a whole, CESO represents a wide range of knowledge and experience in a number of different fields.

For the most part, CESO services are requested by Indian clients for business development projects; it has been estimated that 95% of projects are of this type. Accordingly, the majority of CESO volunteers have a background in business and are therefore well suited to assisting Indian entrepreneurs. Although Indian and Inuit Management Development Program (I/IMDP) has formal responsibility for CESO, in most regions, the Resource, Economic and Employment Development (REED) Branch plays a large role in program co-ordination.

D. LEVELS OF ACTIVITY

Some indicators of levels of activity in CESO services to Indian people in the fiscal year 1983-84 are noted below.

- 684 new projects were added to the 611 projects carried over from the end of the fiscal year for a total of 1,295 projects;
- by the end of the fiscal year, 807 of the 1,297 projects were completed resulting in a carry over of 490 projects;
- on a monthly basis, the number of active projects across Canada averaged about 525;
- the number of volunteers on the CESO roster was 764, but less than 400 of these were actively engaged in projects over the course of the year;
- each active CESO volunteer has an average of 1.5 projects per year; and,
- the number of advisory days provided by CESO volunteers was 13,322 for an average of 10.25 advisory days per project or about 34 days per active volunteer.

E. COST OF SERVICE

Costs of the CESO service can be summarized as follows:

Total Costs

- Over the past three years, actual and estimated total costs to INAC of CESO are as follows:

1982-83	-	\$1,164,000
1983-84	-	\$1,327,000
1984-85 (est.)	-	\$1,565,000

- Of the total cost of the service, in 1984-85 the allocation between direct costs of volunteers and administrative overhead is estimated as follows:

Direct Costs	\$1,200,000	77%
Administration	<u>365,000</u>	<u>23%</u>
Total	<u>\$1,565,000</u>	<u>100%</u>

Service Costs

- The cost of CESO advisors viewed from the perspective of cost per service day in 1983-84 is as follows:

• Cost of travel expenses	\$50.54
• Cost of non-accountable allowance	<u>25.00</u>
Direct costs	\$75.54
• Cost of administrative overhead	<u>24.08</u>
Total cost per advisory day	<u>\$99.62</u>

- the cost per project or per client served is estimated at \$1,023 per project then, based on an average of 10.25 days worked.

F. COST RECOVERY - ADMINISTRATIVE ARRANGEMENTS WITH INAC

CESO receives revenue to support its Canadian Native Program from a variety of sources. A major portion, however, (90%) is provided by Indian and Northern Affairs Canada. CESO services have been purchased by INAC since 1971. Since 1980

X



the funding mechanism is as established in the 5-year master agreement of April 1980 which is to expire on March 31, 1986. The agreement between the two parties provides for the following:

- reimbursement of travel expenses at Treasury Board rates;
- a non-accountable allowance of \$25 per day of advisory service;
- an allowance for overhead of a contribution amount of \$200,000, payable at the outset of the fiscal year plus 12% of travel/living expenses to a specific maximum (\$150,000 in 1984-85).

A sub-agreement which outlines the detailed contribution agreement between INAC and CESO is re-negotiated on an annual basis.

Living expenses for CESO workers are budgeted for and reimbursed through the INAC Regions. The overhead contribution is provided directly to CESO from INAC NHQ.

## CHAPTER II

### ASSESSMENT OF CESO SERVICES

At the outset of this study program managers requested an analysis that would assist in determining:

1. whether the master contract should be renewed in view of the current contract's expiry in 1986.
2. the terms and conditions of the new contract if it should be renewed.

After the Advisory Services Steering Committee had assessed the optional approaches to the study, it was determined that a comprehensive analysis of the "value" of CESO involving contact with clients of the service could not be carried out within the study constraints. Also, it was recognized that overall program managers considered CESO to be an invaluable source of advice to bands and Indian individuals and one which clearly supported the Department's programs and objectives. This view was supported by the in-person discussions in the Ontario Region in the Advisory Services survey phase.

Accordingly, for the most part, the study concentrated on the issues related to CESO of major concern to managers and which could impact on the arrangements with CESO under a new agreement. These are reported in the next chapter.

This chapter, then, provides a brief overview of the benefits of CESO services as determined within the limited scope of analysis that was undertaken.

#### A. REGIONAL ASSESSMENT

In the course of this study, both Economic Development and I/IMDP were contacted with respect to their views on the CESO services. In most regions the CESO service was viewed as an integral part of the continuum of services to Indian people by the Resource, Economic and Employment Development (REED) Branch. It was stated that new businesses and entrepreneurs need a significant degree of advice and support related to a range of business activities: feasibility studies, marketing, accounting systems, and general operational and management systems. Given program requirements and person-year constraints, REED officers are unable to perform these business support activities on an ongoing basis.

The issue of alternatives utilized by INAC was also raised. For example, representatives in regions were asked whether they access the Federal Business Development Bank (FBDB), which through its CASE program also provides business services. With the exception of the Atlantic region, CASE is not used with any significant frequency by INAC for Indian clients. It was reported by at least one region that the FBDB service costs substantially more than CESO and that unlike CESO, FBDB workers are not appropriately oriented to Indian clientele (again, the Atlantic region, which uses CASE frequently, provided a different view). Also, the Indian Management Assistance Program (IMAP), student co-op programs, native student employment programs are also contracted by INAC to provide advisory services to Indian clients. It does not appear, however, that the regions generally view these programs or any others as providing a similar cadre of advisors at low cost with years of experience, potentially in the same field of endeavour as the Indian entrepreneur. >

For the most part REED was identified as the CESO co-ordinator at the regional level and I/IMDP regional offices indicated that CESO services had been used significantly to support REED projects. This situation is dealt with in more detail in the Issues chapter.

#### B. CLIENT ASSESSMENT

The client assessment reported here summarizes the findings in the study undertaken by CESO in 1983 (The Belcourt Report). The conclusions in this report are based on 40 responses returned in a send-out of 148 questionnaires. Since CESO reports its output by projects, rather than clients served (and presumably one client could have more than one CESO project each year), it is impossible to determine precisely the degree of representation in the sample.

It can probably be assumed that no more than one in ten CESO clients would have two projects in a year. Therefore, it is estimated that the response rate of the study provides a sample of about 3% of CESO clients in the year of the study. The regional distribution of the responses was focussed largely in Quebec and Saskatchewan, with no representation from the Maritimes or Manitoba.



However, recognizing its limitations (as does its author), the study does provide some direct feedback on the CESO services. The following were major findings of the study on the access to and reception of CESO services as reported by Indian clients<sup>1</sup>:

- most clients seem to learn initially about the availability of the service from INAC staff;
- repeat business is usually arranged directly between CESO and the Indian client;
- the concept of the "prime volunteer" - an on-going contact between a CESO worker and the Band as is used in Alberta - was viewed positively;
- the perception that there is flexibility and lack of "red tape" at the CESO regional level was viewed positively;
- the pool of appropriate and capable volunteers may need improvement in some areas (a caution is to be noted in that the response to a particular volunteer is, in part, a result of highly subjective factors such as "chemistry" between advisor and his client);
- a greater degree of consultation between CESO and the client prior to assignment of the volunteer may improve the matching process; and,
- 90% of clients surveyed were generally satisfied with the service received.

In light of these findings, it was concluded that:

- the CESO service provides great value to the Indian client, especially so since it is provided at no cost to the client; (A caution must be provided. Since CESO is provided at no cost and there are no other "free" alternatives, it may be that CESO is viewed as better than the alternative - i.e., no advisory services at all)
- the participation of Indian people in the management of CESO should be increased;

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1. The findings in the report are summarized here. Comments in parenthesis are BMC's.

- a procedure for project follow-up is required; and,
- an orientation program should be established for volunteers.

C. VALUE FOR MONEY ANALYSIS

Frequently, reference is made by both CESO and INAC to the economical cost of the CESO service. While sometimes too great an emphasis may be placed on this aspect of the service (because to be of value, CESO must be of high quality as well as of reasonable cost), it may be useful to examine cost of the service as compared to alternatives to provide an introductory "value for money" analysis.

The methodology adopted by CESO for determining the value of its services is the review of the work undertaken by CESO volunteers and the application to this work of a modest pay scale based on wages earned by individuals working in the same areas of endeavour in regular employment. By this analysis, CESO has calculated that the value of CESO services in 1983-84 was \$2 million, which is then compared to the INAC cost of \$1.4 million - an amount which includes the volunteers' travelling expenses as well as their allowance.

However, since CESO services are to provide advice, their value can also be viewed from the perspective of the cost of consulting services. Applying a conservative per diem of \$250 day to the 13,322 days of advisory services reported for 1983/84 results in an imputed value of \$3.3 million. From this analysis, CESO can be seen as providing substantial value to its Indian clients as compared to its cost to INAC.

## CHAPTER III

### ISSUES

Although CESO is seen as a valuable resource by INAC staff and appears to be viewed very positively by the Indian client, there are a various areas open for modification or improvement. The issues that have surfaced in the course of the review are discussed in this chapter.

#### A. CONTRACTUAL ARRANGEMENTS WITH INAC

The contract between CESO and INAC allows for a budgeting process with two distinct components: volunteers and administration.

##### 1. Volunteer Expenses

The budget for CESO volunteer travel, living expenses, and non-accountable allowances is established in the INAC Regional budgets by Regional staff. The estimates are based upon past experience, and, in some cases (i.e. as per Ontario reports), are developed in conjunction with the CESO regional staff. It is possible, however, that in some cases, the amounts are imposed without much consultation by INAC and, thus, represents an imposed operational budget on CESO operations.

##### 2. Administration

The budget for the administrative overhead of CESO is computed as \$200,000 plus 12% of living expenses. This supports the national head office, the CESO regional offices, CESO officer travel, and the costs of CESO advertising and publicity.

The issue related to the contractual arrangements between INAC and CESO is the absence of performance expectations or results statements. Although not made explicit, it appears that INAC does have such expectations. In particular, in the discussions held for this study, several suggestions were made such as: CESO should do more advertising directed at Indian clients and to potential volunteers; CESO Regional Managers should travel more in order to understand the Indian needs better; CESO Regional offices should have a better administrative capability, etc. All of these would suggest that, if these are INAC priorities, specific amounts of money should be identified in the master agreement, and expectations of CESO performance levels in relation to the funds should be identified.

Also, it would likely be a better budgeting practice if an average cost per advisory day of service were established, which then could be "purchased" by INAC, as per anticipated requirements.

Therefore, it is recommended that:

**The funding arrangements between INAC and CESO be based upon explicit performance expectations for CESO.**

Prior to establishing a performance-based system which would serve as a "base" for future funding, INAC and CESO should jointly review and agree upon the components of the CESO overhead which should be a part of this formula. In particular, the way in which CESO attributes head office overhead costs to its various sponsors, CIDA, INAC and others should be reviewed, along with the rationalized need for some regional offices (i.e., the two offices in New Brunswick). Therefore, it is also recommended that:

**INAC ensure that the CESO head office overhead expenses allocated to the Department are clearly attributable to functions related to the INAC contract and are considered to be priority activities.**

#### **B. INDIAN INVOLVEMENT IN CESO**

The issue of Indian involvement in the management of CESO was identified in the course of initial discussions concerning this project. It was also raised in the 1983 CESO study (The Belcourt Report). In the earlier study it was noted that there was an Indian member on the Board of Directors (which has 15 voting members) and two native people on the 30 member Advisory Council. During interviews for this study with the Chairman of CESO, it was indicated that a review of Indian participation in the corporate structure of CESO was (or would be) taking place.

Although CESO is an independent organization which legitimately makes its own arrangements for its corporate management, CESO should also be aware that most of the INAC funding for advisory services through service contracts is provided to CESO. Thus, CESO is seen by INAC as a major vehicle for provision of these types of services.

INAC has a stated objective of including Indian people in the delivery of services. An example of this commitment is the Departmental objective of "strengthening the cooperative relationship between the Department and its client groups through the collective development of consultation processes" (Estimates, Part III, 1985-86).



It is likely, then, that the Department and, increasingly, the client group, will continue to request the involvement of Indian people in the CESO executive structure, if CESO is to remain the major point of access to advisory services for Indian communities. It is also suggested that a formal link with the client group can only improve the level of responsiveness of CESO to its clients in the Canadian Native Program. It is possible that many approaches exist for providing this input:

- Indian/Inuit executive members;
- Indian/Inuit members of the Board;
- Indian/Inuit members of the Advisory Committee; and/or
- Indian/Inuit membership on various sub-committees -- i.e., in an orientation program.

The advantages and disadvantages of each option deserve further consideration.

Therefore, it is recommended that:

**in consultation with INAC and Indian people, CESO establish a mechanism for increasing the input of Indian people in the management of the Canadian Native Program in a manner suitable to the achievement of Indian goals.**

Also, wherever possible, CESO regional office should establish links with representative Indian groups in their region. While a thorough review of the existing linkages has not been conducted in this study, it is recognized that many do already exist and that these are (and must remain) flexible depending on the particular conditions in the region.

It is recommended that:

**CESO establish a general policy of involving regional Indian representatives in such activities as identification of projects and orientation of volunteers.**

#### **C. VOLUNTEER POOL DEVELOPMENT**

As was noted in the previous chapter, the expertise provided by the pool of CESO volunteers is generally considered by INAC and the client group to be of very high quality. Two areas for potential improvement, however, have been identified:

1. Recruitment

The volunteer recruitment process is currently an informal one. Recruitment often takes place by word-of-mouth from an active volunteer to a retiree, or through requests to service clubs. Some INAC staff have indicated that an enhancement of the quality and range of experience in the volunteer pool might result from a more directed recruitment and volunteer attestation program. To conduct such a program will cost money and specific funds should be earmarked for it.

It is recommended that:

- INAC and CESO develop a pilot special recruitment program targetted in areas where problems in volunteer recruitment are reported; and
- that this special program be discretely funded on a trial basis for one year.

2. Volunteer Orientation

It was noted by representatives in several regions that a program of orientation for volunteers is required. This would assist volunteers in developing the necessary sensitivities to the client group and thus help the volunteer get a good start. This orientation program should be developed in consultation with Indian people, and possibly include Indian people in its delivery. (One option for an orientation program, suggested by Ontario Region, is a video tape) The development of such a program would likely require special funding.

It is recommended that:

- INAC and CESO, in consultation with Indian people, jointly develop an orientation program for new CESO volunteers; and,
- this program be specifically funded by INAC for a trial period of two years.

D. CLIENT/CONSULTANT RELATIONSHIP: TERMS OF REFERENCE

It has been reported that in many cases the relationship between the CESO volunteer and the Indian client is very informal. The client identifies a need (or has one identified for him by a band or INAC employee), CESO arrives, reviews the problems and provides advice, and at some specified point the relationship between the CESO advisor and the client comes to an end. CESO (and in some cases INAC

regional managers) have indicated that this informality is useful in allowing the flexibility so that CESO can be appropriately responsive to needs as they are identified.

The informality could also, however, result in confusion on the part of the client about the purpose of the CESO advisor's input (the problem of a client feeling that CESO had been sent by INAC was cited occasionally in the client statements in the Belcourt report), the scope and intent of the advice, and the results/actions that are required. It, therefore, is suggested that some formal description of the problem (as is currently done in some regions, e.g., Ontario) and the nature of the advice to be given be provided to (and agreed with) the Indian client. This should include assignment objectives, a project budget of the number of anticipated days of advisory services and a calendar time-frame. The intent of such a document would be to act as a useful guide rather than a constraint.

This process could have several spin-off benefits. For the Indian clients, it would begin to acquaint them with the usual terms, conditions, and arrangements in the consulting relationship. This would assist these clients if, in the future, they were to hire consulting services in the marketplace.

For the CESO office, it would assist in budget control by providing a basis for estimating project costs. It would assist the CESO regional manager in setting priorities among requests for services, should demand for services exceed supply for volunteers, and in keeping records on the projects undertaken in the region.

For the INAC Regional Office, which should sign-off the terms of reference, the project document becomes a tool for keeping in touch with projects in the Indian community and a mechanism for ensuring the project is a priority in view of scarce funds. It will also indicate that the Indian client has an adequate understanding of and agreement with the project description.

CESO has noted that formal project documentation may be difficult where the CESO advisors are attached to the band and provide continuous, rather than specific, project advice. In these instances, terms of reference and a clear anticipated budget for clearly specified activities of a general advisory nature can be established.

It is recommended that:

for most, if not all projects, terms of reference agreed to by the CESO volunteer, the INAC Regional Office and the Indian client be established for each CESO project of advisory service.

E. PROJECT CLOSE-OUT

Related to the development of more formal mechanisms for project management (i.e., terms of reference) is the issue of project close-out. It is noted that the CESO advisory services usually do not relate to specific targets or deadlines of the Indian client; accordingly the close-out has tended to be informal and this has worked well.

It is suggested, however, that a final statement of work conducted, results obtained, and follow-up required by the CESO volunteer would be useful both for INAC and the CESO region at the end of the project. A project evaluation (similar to the one proposed by CESO in Ontario region) by the client of the services would also be a useful addition to the project file. These documents would assist in on-going management in the regions and in formal evaluation of the services, as will likely be required by INAC or central agencies of the government on a periodic basis.

It is recommended that:

a brief formal project close-out including a statement of activities and results by the CESO volunteer and an evaluation of the service by the Indian client be established.

F. PROJECT FOLLOW-UP

A major concern on the part of the client group, as identified in the 1983 CESO report, is the potential for a shortfall in the follow-up on projects which have received advisory services from CESO. Sometimes projects which seemed to have a promising future at the end of CESO input, fall through later, perhaps due to the absence of on-going management support. As indicated, it is unclear to the clients whether the responsibility for follow-up lies with CESO, INAC, Indian Associations or the client themselves.

This would seem to underline the need for CESO advice to be viewed as an aspect of the continuum of services to Indian people. When CESO withdraws (either due to a logical end to their input or the "retiring" of a volunteer) it is important that this be communicated to the agencies that can provide back-up and substitute support. For the time being, and until Indian self-government is realised, it is appropriate



that INAC play the role of co-ordinator of services. To this end, the project close-out report noted above will provide critical input to INAC in its efforts to ensure continuity in the services provided to its Indian clients.

It is recommended that:

**INAC review project close-out documents provided by CESO to ensure that, wherever possible, an arrangement for follow-up with CESO clients is made.**

**G. ADMINISTRATIVE GUIDELINES/FLEXIBILITY**

It was noted that although some regions have established operational policies and guidelines for CESO, there is no such national approach. While this does allow for greater flexibility, it has been noted that there are inconsistencies in approach by CESO staff across Canada leading to possible inefficiencies. Without imposing rigid national procedures, it would be useful to establish national operational guidelines which would include, for example, standard forms for reporting to INAC and CESO HQ. These could be developed by extracting the best practices and procedures that have been developed independently in the regions.

At the same time, it is also essential to build flexibility into the system to allow for regional differences and innovations. For example, Alberta has established the concept of prime volunteer where a single representative of CESO maintains on-going contact with a band, as the band's generalist advisor and CESO's marketing arm. But, there are some problems with funding such an arrangement since it involves heavier expenditures in co-ordination through the regional office. To allow for independent regional approaches, some flexibility in the budgeting system would be desirable.

It is recommended that:

- **national operational guidelines be developed and applied as appropriate. INAC should be consulted in the development of report formats to NHQ for which it will be a recipient; and**
- **notwithstanding the above, arrangements should be made to allow for regional flexibility and innovation, including some budgetary flexibility where this is required.**

#### H. ANNUAL REPORTING TO INAC

While it is accepted that CESO should not be producing extensive statistics on advisory services provided, some quantitative indicators should be agreed-upon between CESO and INAC, compiled by CESO on a regular basis, and reported as part of the information supporting the expenditure of funds by INAC for CESO services. In accordance with the changes suggested in the item on Contractual Arrangements (item A above), it is suggested that reporting to INAC be performance-based. For example, close-out reports per project could summarize the days of service provided; a monthly report could identify by Region the number of projects, number of days and dollar expense costs. Annually, a summary analysis of average days per project, average travel and allowance cost per day and average total cost per project, in addition to the annual total figures, would augment the expenditure reports currently provided.

It is recommended that:

**CESO reports to INAC include performance-based information to support its program expenditures and budget request as agreed to between the two agencies.**

#### I. CESO AND THE I/IMDP FOCUS

The objective of the I/IMDP is to improve the level of management knowledge and skills within the band council and staff. (Source: I/IMDP Program Directive.) The major target of the program is the band's elected officials and the band's management and support staff and the focus is the improvement of the practices of local Indian government.

Although CESO does not exclude any request for service and probably does have some retired local government officials on staff, the focus of its advisory services has been on general management advice to bands and individuals with respect to economic and community development, and assistance on specific projects usually of an economic development nature. The bulk of activity is related to the business development projects of Indian entrepreneurs.

This focus of CESO is reflected in the INAC regional administration of the service. In most regions, the CESO service management is situated operationally, if not formally, in the Economic Development Branch (an exception is Québec where it is placed under the Director of Operations). In most regions I/IMDP did not have much of a role either in administering the service or in utilizing the service for its client's needs.

This situation does not seem to be due to any resistance either on the part of Economic Development or CESO. The Regional representatives indicated that Economic Development will fund any CESO project requested by any area in the regional administration. CESO has also indicated that it is willing to undertake service in various disciplines and looks forward to more band management development projects. Since CESO tends to be reactive to requests for service, I/IMDP will likely have to be more proactive in promoting the use of CESO in local government matters with bands if it would like bands to access CESO more frequently for I/IMDP program goals.

It is the opinion of the study team that I/IMDP types of projects will probably remain the minority in the CESO portfolio. The orientation of projects is likely due to the priority given to economic development projects by the Indian clients and to the appropriateness of the fit between these types of advisory services and business projects. These relationships will probably persist. Nevertheless, the representation of I/IMDP projects would likely increase if more active "marketing" were undertaken by District and Regional I/IMDP staff. As a result, it is recommended that:

**the wide range of expertise potentially available through CESO advisory services is recognized, and that all INAC program areas, including I/IMDP, ensure that Indian clients are aware of the service and are encouraged to use it.**

### CONCLUSION

This review has shown that CESO provides a significant pool of talent and expertise for the Indian people of Canada. The high levels of activity of CESO and the responses received concerning the services indicate that CESO volunteers are well regarded both by INAC and its Indian clientele. Nevertheless, there is some evidence that the demand for management assistance and support in all fields of endeavour at the band level are not being met in all instances. For example:

- projects sometimes fail after CESO withdraws its services;
- a high level of need for advisory services among Indian Economic Development Fund (IEDF) recipients;
- I/IMDP regional offices do not use CESO extensively;
- clients interviews in the companion study of IMAP indicated a need for more advisory services.

It has also been suggested that the demand for services will increase as bands move towards greater independence and self-government.

The observation regarding the need for services seem inconsistent with the suggestion by CESO that some of the CESO volunteers are not utilized due to the lack of demand and by INAC that adequate funding is generally available for all requests for CESO service. This situation could have one or more of several causes:

- potential Indian clients are not aware of the availability of CESO;
- the skills of CESO volunteers do not always match the requirements;
- INAC has not encouraged the use of CESO to supplement its programming.

It appears that further consideration of the shortfall in use of CESO is required. It may be that an overall "needs assessment" of the demand and need for advisory services in Indian communities is required.

Apart from the student assistance provided through the Indian Management Assistance Program (IMAP), CESO is the only standing service contract INAC has for advisory services. It may be well be that there are other agencies providing advisory services (e.g., FBDB) that could provide a valuable



service, were access made easier through a service contract. Perhaps the development of a domestic Canadian University Students Overseas (CUSO) program should be considered to augment CESO services. An overall review of needs, existing services, and other options may be in order to ensure that an appropriate level of service is provided to the Indian community.

**PART II**  
**INDIAN MANAGEMENT ASSISTANCE PROGRAM**

## II. INDIAN MANAGEMENT ASSISTANCE PROGRAM

### INTRODUCTION

#### A. BACKGROUND

This part of the report is the second outcome of a review of advisory services which began in mid-1984 at the request of the Program Evaluation Branch of Indian and Northern Affairs Canada (INAC). This part of the report documents the analysis undertaken of IMAP advisory services.

All phases of this part of the study have also taken place under the general guidance of an Advisory Services Review Steering Committee chaired by Program Evaluation Branch. This committee has reviewed and confirmed the major issues of concern discussed in this report (Appendix A lists the members of the Steering Committee).

#### B. METHODOLOGY

This assessment was carried out over the period from October, 1984, until April, 1985; it encompassed a number of separate and distinct steps which are summarized below:

1. During the advisory services survey phase, a number of key issues were identified for further review. These were:
  - impacts and effects on Indian clients;
  - clarification of program objectives;
  - identification of projects;
  - selection of clients and students;
  - size of program;
  - existing evaluation mechanisms;
  - focus of advice;
  - cost-effectiveness of orientation program;
  - cost-effectiveness of total program.
2. To commence the review, a consultant from the Bureau of Management Consulting (BMC) attended the University of Western Ontario for a "de-briefing" session that had been scheduled between UWO student consultants, the program directors at UWO, and the officials from INAC. This session provided the BMC consultant with the opportunity to obtain first-hand information from the students concerning their experiences and to conduct discussions with the program directors at UWO.

3. In-person discussions were conducted with INAC staff in the Ontario Region, and telephone interviews were held with INAC staff in four other regions. These were based on an interview guide that had been developed, and were to obtain information regarding the way in which the program was directed at the INAC regional level.
4. Resulting from the above, a report was written and submitted to the Advisory Services Review Steering Committee. Following Committee review, the report was modified, and it was agreed that there should be a distribution of the modified report to all nine INAC Regional Offices and to UWO. It was also agreed that the study should incorporate a set of intensive client interviews, to provide a further dimension by which to determine the program's value.
5. Both of the above actions were taken, and comments were received from UWO and the Regions. These were then incorporated into the overall analysis. This report, then, provides a synthesis of all information obtained from the various sources during the study period.

#### C. PRESENTATION OF REPORT

This part of the report is organized into four chapters. In the first chapter an overview is provided of the Indian Management Assistance Program: its objectives, activities, and arrangements with INAC. The following chapter outlines the methodology and the findings of the study which collected information from past clients of IMAP. In the third chapter, a general assessment of the IMAP program based on client feedback, regional comments and a value for money assessment is provided. The concluding chapter of the report is a review of the issues affecting the IMAP program which have arisen in the course of this review.



## CHAPTER I

### OVERVIEW OF THE INDIAN MANAGEMENT ASSISTANCE PROGRAM

#### A. OBJECTIVES OF THE PROGRAM

As indicated in the recent report to the Minister of Indian and Northern Affairs by the University of Western Ontario, the objectives that the IMAP program focussed on for the 1984 summer period are as described below:

1. to provide Indian clients with the opportunity to benefit from and learn the latest management skills;
2. to provide low cost assistance to Indian clients;
3. to provide Indian students with the opportunity to increase their skill base by working with MBA/undergraduate business administration students on management problems in an Indian context;
4. to expand the relationship between Indian business people (and/or bands) and the business schools in order to:
  - a) increase the understanding of the Indian business environment in the business schools;
  - b) provide business students with an awareness of the present and potential role of Indian businesses in Canadian society; and,
5. to provide business administration students with summer employment commensurate with their background, training and goals.

From the above, it will be noted that the program has identified four target groups: Indian clients (#1 and #2), Indian students who may participate in the program (#3), the business schools themselves (#4), and finally the non-native students (#5). These objectives, as stated above, are UWO's and not INAC's for the program. INAC's intent for the program is expressed in only the first three objectives statements. As the priority of aims indicated by UWO, however, is consistent with the priorities of the Department, there is no inherent conflict.

B. PROGRAM HISTORY

Until 1982, the student summer assistance program was called the Indian Business Development Program and was coordinated by the Economic Development Branch (now Resource, Economic and Employment Development). With the change in name to Indian Management Assistance Program, the responsibility for the program was transferred to the Indian/Inuit Management Development Program (I/IMDP). Although a greater number of projects are now established in the management assistance area, the greatest number of projects in 1984-85 continue to be oriented toward economic development projects.

C. ADMINISTRATIVE ARRANGEMENTS

The program cycle commences with the de-briefing session for the previous year, at which time there is a general assessment of the results that seem to have been achieved, and an identification of what the program should attempt to accomplish in the following year. In fact, this session takes place after the INAC budgetary planning process has already begun, so at this meeting the general expenditure parameters can only be reviewed but not changed. Final and minor modifications are made later. Subsequently, the University of Western Ontario contacts a number of business schools across the country to request their participation as faculty advisors and in the identification of students for the summer program. Concurrently, the INAC regions are advised to undertake the planning for the work/projects that will be submitted for the program.

In approximately January, project lists are forwarded to UWO, which then makes them available to the other universities that will be participating in the program. These lists, or at least those portions of the overall list that apply to the particular area for which the university has been requested to obtain students, are then posted at the business schools, and students are invited to apply for the employment being offered.

At about this time, the financial arrangements between the UWO and INAC are concluded, with INAC finalizing the budget estimate from UWO. The contribution agreement is then signed between INAC and UWO.

Student applications are received by the university faculty person who has been designated for the program by the UWO. This faculty member does a pre-screening of the student applications, based on local information; in most cases, the relevant INAC staff then visit the university campus to make a final selection from the remaining applications.

The students selected for the program undergo a week-long orientation session produced and delivered by the University of Western Ontario, mostly on campus. This session is revised in part annually, and incorporates input from a number of different faculty areas at UWO, as well as from INAC staff who also participate directly in some portions of the orientation program.

Following the orientation session, the students are sent to the designated regional headquarters by UWO, utilizing travel funds included in the master agreement with INAC.

(Similarly, at the end of the summer, the student returns from the region at the expense of UWO, which is reimbursed by INAC.)

While in the region, travel expenses for the student are paid through the regional INAC staff travel budget; salaries for the students are, however, paid by UWO every two weeks. The student prepares a weekly report for the program director at UWO throughout the course of the assignment.

At the end of the summer, there is usually some form of review process in the region, and the student is expected to prepare documentation covering the involvement with the Indian clients. Finally, in approximately October, the de-briefing session at UWO for returning UWO students takes place. Other regions may undertake some form of debriefing session with other member universities, but only UWO's session is defined in the program criteria.

#### D. MAJOR PROGRAM COMPONENTS

In this section the principal components and processes involved in the program are described in more detail.

##### a) Program Planning and Contract Negotiation

In the period from about October until about December, UWO faculty are involved in finalizing the documentation for the program just completed, and in making general arrangements for the upcoming year. This latter task involves conducting all of the various discussions with the identified and/or potential faculty members at other universities. Subsequently, in the period from December until about April, the UWO and other university faculty members plan the scope of the program by preparing program announcements, by reviewing applications and by contacting the INAC Regions. As well, UWO faculty are occupied throughout the whole period until about March in discussions with INAC concerning the Contribution Agreement which must be signed annually.

b) Student Identification and Selection

Based on past results and a definition of requirements, I/IMDP at NHQ decides the maximum number of students for the program year and their allocation by region.

The selection of specific students is dependent upon a variety of factors, some of which are identified below:

- consistency with the nature of the work to be carried out. The type of student required changes depending on the Indian clients identified and their particular problem areas;
- a number of INAC Regional staff and in a few cases Indian representatives are involved in making the final selections, based on their own particular regional backgrounds and those of Indian bands involved;
- a number of different universities and faculty members are involved in the process, each of whom has a different perception of the needs of the Indian clients; and
- the students themselves come from a variety of different backgrounds: native (primarily from community colleges or business colleges, but also some with university background), non-native undergraduate students from universities, and business school graduate students, primarily from UWO.

In effect, then, INAC, UWO and other universities select students based on their individual assessments of the best individuals for the particular environment.

c) Student Orientation

The orientation session is held annually at the UWO or at a nearby hotel (depending on space availability at UWO) to acquaint the students with issues that they will be facing in their summer work. The session is focussed upon such things as cross-cultural considerations, the art of providing consulting services, and specific administrative concerns that they may face. The session also allows the students to get to know one another, in the expectation that the students will be able to relate to one another during the summer to share experiences.

During the week, the students are given a number of presentations from a variety of sources: UWO faculty members, INAC staff, and individuals from Indian organizations. An additional orientation may take place when the student arrives at the regional or district level in some instances, provided by INAC staff and sometimes supplemented by persons from Indian organizations.

In relation to costs for this session, the following apply: the students are paid their regular salary, student expenses for "board" are paid by the UWO, and UWO faculty are paid a stipend which includes this period. UWO administrative staff expenses are also incurred. All of these expenses are paid from the INAC contribution.

d) Student On-Site Period

During this period, the students are generally under the supervision or general direction of either INAC staff (in most cases) or an Indian person (Tribal Council officer, for example). University faculty persons are expected to maintain a contact with the students, and the UWO program directors would normally review the weekly reports. As well, the faculty member may visit the site, to work with the student for a few days, though this varies by region and by individual involved.

Administrative costs for this period (i.e., aside from the student salaries) tend to be low, and are comprised, primarily, of long distance telephone calls and any faculty member stipend that could be considered to be associated with this period.

e) Post Assignment Period

A brief report is prepared by the university faculty member and forwarded to UWO. Generally, this report is sent as a detailed covering letter for the student's report; in some cases, the letter is jointly signed with the INAC staff person who was involved.

At the end of this period, a summary report is prepared by UWO faculty persons, based on the above-noted input, for submission to INAC with the final invoice for expenses. This should occur by about the end of November.



E. PROGRAM COST

The total cost of IMAP over the past three fiscal years and an estimate for the upcoming year is as follows:

1982-83	\$194,000
1983-84	228,000
1984-85	289,685
1985-86 (est)	319,700

The breakdown of expenditures between categories in 1984 is roughly as indicated below.

Student Salaries	\$181,700
Travel	31,750
Secretarial & Supplies	8,500
Faculty Honoraria	29,950
Overhead Contribution	<u>37,785</u>
	\$289,685

If a portion of the travel costs are seen as relating to faculty travel, it can be said that costs directly related to the provision of student advisory services (and not to university support) are \$207,955 or 72% of the total.

The number of Indian clients listed in the UWO report for 1984 was found to be 177. The cost per Indian client served in 1984 was, on average, approximately \$1,636. This is based on an analysis of the number of projects which excludes the 27 projects where INAC was listed as the client or found to be in our client interviews. This methodology is considered to be appropriate given the program objective of service to Indian clients.

## CHAPTER II

### CLIENT EVALUATION

In determining the scope of the review of IMAP, it was noted that although the students provide feedback of their input to UWO (and INAC) as part of the summer de-briefing, no input from the actual clients of the services has been sought on either a regular or periodic basis. Accordingly, it was determined that a significant effort in the Advisory Services review would be directed toward the collection and analysis of information about IMAP from its Indian clients. This review was to provide input both into the assessment of the overall "value" of the program and into the identification of areas for improvement, if the mandate for the program were to remain. The Advisory Committee confirmed this focus for the study in a meeting in December 1984.

The complete study for anglophone clients, as prepared by the sub-contractors to BMC, is available as an interim report (Onchiota, Evaluation of the Indian Management Assistance Program, March 1985). This chapter summarizes the findings of their study along with the other data for francophone clients; the overall assessment of the program is contained in the next chapter.

#### A. CONDUCT OF THE STUDY

To select an appropriate sample of clients, the UWO report was first examined and a sample of clients/assignments was randomly selected from the information provided in that document. To obtain an appropriate cross-section, three clients were identified for each student and these formed the original sample. Each INAC Regional Office was then contacted by telephone to obtain the full name, mailing address and telephone number of the selected client/assignment. (See Appendix C for an outline of the master document used in identifying the sample.) At this time, it was determined that, in some cases, there had been what we termed an Indian prime contact for some of the students: this was generally an individual with an organization such as a Development Corporation or the Tribal Council. When such a person had had a role in the program, he/she was also identified as a potential contact for the study.

A questionnaire was prepared, and this was mailed to the selected Indian clients by INAC Program Evaluation Branch. Subsequently, the individuals identified on the mailing list,

and the prime contacts, were contacted by the consultants, and, utilizing the detailed interview questionnaire, the client responses were obtained.

#### B. NUMBERS OF CLIENTS/CONTACTS IDENTIFIED

As noted above, the aim was to identify, in the initial selection, at least three clients or assignments for each student. This was found to be impossible in some cases, and the list provided to the interviewer/consultants contained only 67 names, addresses and phone numbers, (versus the 87 that would have been shown if 3 clients had been obtained for each of the 29 students). Additionally, it was found that the survey would only be examining the work of 25 students, as the other 4 had assignments only within INAC offices.

The consultants attempted to contact all the persons on this reduced list. For various reasons, they were only able to conduct interviews with 39 clients and 7 prime contacts - this accounted for a total of 63 assignments. In addition, they contacted 2 INAC district staff to obtain information concerning 6 assignments. Overall, it is considered that a representation of 63 of a total of 180 assignments, or approximately 35% of the program year, is a significant sample of IMAF clients.

#### C. FINDINGS

The information received from the survey of clients and prime contacts provided another dimension to that already received from INAC and UWO. All three sources of information have been used jointly in developing an overall assessment of the program (provided in Chapter III) and in identifying and illuminating the program issues which are dealt with in the final chapter of the report. The frequencies associated with each type of finding, by major category are provided in Appendix B.

A brief overview of the findings from the client survey is provided below:

- a little more than half of the clients indicated that they, or their band, or some other native organization, had been involved in the initial identification and selection of the tasks;
- where prime contacts were involved, INAC worked with the prime contacts in identifying the

assignments for students; none of these individuals were involved, however, in the selection of the student;

- in five of seven situations where prime contacts were involved, the student was assigned to work with the Tribal Council or Development Corporation; the student then worked with other clients at the Band level, to some extent, on behalf of the Indian organization. The prime contacts provided students with an orientation to their organization and the communities with which they would be working;
- a small number of clients initially had perceived the students as INAC employees; others were simply advised by INAC that a student was being sent to help them;
- many of the clients did not wish to comment on the skills displayed by the student in relation to the skills that the client expected the student to have; however, twelve clients did comment on this, and all indicated that the skills of the student surpassed the requirement;
- over 50% of clients indicated that INAC was solely responsible for the supervision of the student; however, 17 clients indicated that they alone, or with INAC or an Indian organization, did play a role in supervision of the student's work;
- more than half of the clients contacted could not indicate the duration of the assistance provided, as the student did not work on-site, or the contact between themselves and the student was intermittent; however, five clients indicated that the work assignment covered a period in excess of one month;
- terms of reference or a clear statement of the problem were available or known to exist by the client in only 11 cases. However in 22 of 39 cases, the student and the client did jointly discuss the problem in some detail prior to the student commencing work activity;
- 28 of 39 clients indicated that they had received some form of final report from the student as a result of the assignment; the others either had received operational assistance or there was no report;

- about one-third of the clients were not fully satisfied with the results of the assignment, for various reasons: e.g., the work had been oversimplified, insufficient time was spent, INAC was the real beneficiary, the assignment was cancelled, the project was of a longer duration than the student had time for, or the funding proposal prepared was not accepted by INAC; however, in all of these cases the dissatisfaction was not with the student but with other factors;
- in very few cases was the client requested by INAC to provide a final assessment of the student or the assignment; in a number of other cases, the client had provided an informal assessment to INAC without being asked;
- most clients indicated that they would like to be involved in a project assessment and follow-up process;
- the results and/or benefits reported were numerous:
  - nine clients noted that the funding proposals prepared by the student had been accepted, and new employment or economic opportunities were established;
  - decision-making skills were enhanced, knowledge of the business or the environment was increased, etc.;
  - student consultants provided excellent role models for youth in the community;
  - clients felt they had received unbiased third-party opinions;
  - clients living in remote locations were able to obtain information that would have been impossible for them to receive otherwise.

In summary, the clients provided a useful input pertaining to the actual results of the program on its intended target group. A majority of clients were eager to participate in the review study and provided further information and recommendations on how the program could be enhanced. These are incorporated into the "assessment" of IMAP provided in the following chapter.



## CHAPTER III

### ASSESSMENT OF IMAP

This chapter provides a general analysis of the perceptions of the users of the services provided by IMAP: those of the regional offices of INAC, and the district officers in the Ontario Region; and program clients (including prime Native contacts, as per the definition in previous chapter). The information will be useful in determining the overall "value" of the program, the outlook for its continuation and the contribution that it makes to the Indian and Inuit Management Development Program (I/IMDP) and INAC goals.

#### A. REGIONAL INAC ASSESSMENT

To gain a regional perspective on the IMAP program, the INAC co-ordinators were contacted in several Regional Offices. In addition, IMAP co-ordinators were asked to comment on a discussion paper providing preliminary findings of the study.

To determine the use of the program by the INAC Regions, it is useful to look at the allocation of the 29 students participating in the program in 1984-85:

<u>Atl.</u>	<u>Que.</u>	<u>Ont.</u>	<u>Man.</u>	<u>Sask.</u>	<u>Alta.</u>	<u>B.C.</u>	<u>NWT</u>	<u>Yukon</u>	<u>TOTAL</u>
4	2	7	8	2	2	2	1	1	29

Therefore, all regions in Canada do access the program, although two regions (Manitoba and Ontario) had about 50% of the students in the program. The lower levels of program utilization in the other regions do not appear to be due to any inherent perceived problem with the program on the part of regional co-ordinators. Rather, the number of students assigned and their placement seems to be a function of three factors: the region's initiative in identifying projects, the availability and identification of qualified students and the budget/administrative constraints on the region and program.

All regions expressed a high level of satisfaction with the IMAP as a program providing student consulting assistance. It was felt that the students were consistently of high quality, with expertise that was relevant and useful to the Indian clients. B.C. region indicated that it could have used more students profitably, had they been available.

The Regional and District officers' high level of satisfaction with the students assigned under IMAP may in fact result in over-utilization of these resources at the

INAC offices. In too many cases, the IMAP students do not actually work directly with Indian clients.

Similar to the CESO program, for IMAP (operationally if not formally) the Resource, Economic and Employment Development (REED) Branch plays a large role in program co-ordination in most regions. Although several projects were identified by I/IMDP and appeared to have a local government focus, the bulk of advisory activity was related to business enterprises.

#### B. CLIENT ASSESSMENT OF PROGRAM

The majority of clients canvassed in the course of this study indicated that the concept of providing students educated in management theory and practices to assist them with their businesses and other local enterprises was a good one. Where problems did occur, they did not appear to be linked to the student assigned. Rather, they arose from confusion about the role of the student, lack of project definition, or what appears to have been an inappropriate assignment for the student. All clients who actually did have a clearly-defined assignment undertaken for them by the student (and who reported on this item) indicated that skills shown by the student were of high quality and relevant to their requirements. Several clients (and prime contacts) indicated that a student consulting service could be used year-round. This raised the issue of establishing a mechanism for accessing students in co-op programs (where students have field placements at different times during the calendar year). Although last summer was the first contact with an IMAP student for most clients, one client had received services through the program for three years in succession.

Clients who had not been fully involved in the process of defining the assignment, supervising the students and assessing the results, indicated a willingness and a desire to do so. It appeared from the survey that the most successful projects were those in which the client played an active part.

The results also indicate that several of the client recipients, and particularly the prime contacts, feel that direct access to the students (with reduced INAC involvement) would be preferable, although reasons for this view were not given. The opinion was not consistent; four or five of the francophone clients indicated that the role of the INAC Economic Development officer was useful in establishing terms of reference and assisting the student with the assignment. One client, with strong opinions

about the value of the program and recommendations for its improvement, considered that the students should be assigned to INAC Economic Development officers, and provide expert business advice based on market studies and feasibility analysis. All prime contacts considered that the program could be improved if Band and Tribal Councils were involved at an earlier stage in reviewing the capabilities available in the selected students, in selecting appropriate projects to be served by the student resources, and in identifying capabilities or skills required.

Some of the prime contacts indicated that utilization of the student resource was curtailed due to a lack of travel funds allocated by the Regions. In these cases, proposed assignments in remote communities could not be carried out. This seems to have been a particular problem where the student used the Indian organization as a base rather than the INAC office. Also, some clients (particularly band managers), indicated that a better utilization could have occurred if the student had been situated on-site at the reserve for the period of the assignment.

Although there was only minimal reference from the clients about situations where cultural differences had led to a less than desirable relationship between the student advisor and the Indian clients, several clients indicated that they would consider greater participation by Native students to be beneficial.

A majority of clients considered that business administration and economic development support should continue to be the priority assistance areas. It was also considered that student consulting assistance would be useful from other specialized disciplines, such as engineering, forestry, agriculture, education and community development.

#### C. VALUE FOR MONEY

Some concern has been expressed by INAC staff about the cost of the IMAP program. It may, therefore, be useful to have a detailed look at the costs involved to provide a preliminary "value for money" analysis.

In 1984, the total cost of the program was approximately \$290,000. Based on an estimate of the probable total days of service, the number of days of advisory services for 29 students was about 2175. Therefore, the cost per advisory day of service is \$133.19 excluding travel and expenses.

It is difficult to estimate the cost of student advice in the open marketplace. It is unlikely, however, that senior level

MBA students could be hired directly for less than \$125.00 per day. Therefore, given the orientation and direction received by the students, the service at \$133 per day is likely to be of good value when compared to other services. Of course, IMAP appears costly when compared with CESO (\$99.62 per day, including travel and expenses). However, it should be noted that CESO's low cost is due to the provision of volunteer services, while IMAP students are paid a wage. The type of service and circumstances of the advisors are different: IMAP students use their summer earnings to finance their education and could not be expected to provide services free of charge or at only token rates. Also, INAC will to some degree be competing with other employers for these qualified student resources.

It should be noted that the source of expertise in CESO and IMAP is different: in CESO, it is presumed to derive from years of experience; in IMAP, it should result from application of management theory and the latest techniques. Since the form and substance of the advice is different, and one could not easily take the place of the other. It is unreasonable to place too much weight on a direct comparison of costs between the two programs.

## CHAPTER IV

### ISSUES

IMAP is seen as a valuable resource by INAC staff and is viewed very positively by Indian clients. However, there are a number of areas where modification would lead to program improvement.

This chapter reviews the issues that have been raised in the course of the study. For each issue, a description is provided, followed by an analysis and recommendations for potential action by INAC.

#### A. PROGRAM ADMINISTRATION

Over the past 12 years, the University of Western Ontario's School of Business Administration has been responsible for the Indian Management Assistance Program. Though there have been modifications and improvements since its inception, most major elements have remained relatively unchanged over the period. In particular, these elements are: UWO program definition and direction, UWO student orientation process, UWO co-ordination and salary distribution over the summer period, UWO financial direction and accounting information, and UWO program wrap-up and report. Generally, those contacted felt that UWO had carried out these activities reasonably well. Some regional representatives, however, thought that they could carry out some or all of the elements of the program directly themselves in a more effective and efficient manner.

It should be noted, however, that most elements of the program currently undertaken by UWO would have to be carried out by the Regional Offices if the program administration were to be taken over by INAC. Under the current agreement with UWO, the internal costs at the regional level for advisory services are reduced by contracting out the service. It should also be recognized that some loss of experience and continuity would occur if UWO no longer provided services and that INAC Regional Offices would have to organize themselves around the deadlines imposed by the school terms to appropriately deploy the students. However, while recognizing these considerations, it is the opinion of the study team that other options for program management should be examined now that the program has reached maturity. Potential mechanisms include the following:



- UWO continue to administer the program with some revisions as indicated in the discussion of other issues;
- the contract for administration of IMAP be tendered to the whole university community, or at least to selected alternative institutions;
- UWO (another university, or existing participating universities) carry out some portions of the program such as student identification and salary administration and Regional INAC administration take over the balance of the program; or,
- the INAC Regional Offices take over the program completely. This would require that the student selection be solely from local universities and orientation take place at the regional and local level.

While there seems to be good arguments for greater regional involvement, the advantages and disadvantages of these options have not been considered in any detail by the study team.

Accordingly, it is recommended that:

**a detailed review be undertaken of various options for administration of IMAP.**

Any changes which are recommended could not be implemented until the 1986-87 fiscal year.

#### **B. ORIENTATION PROGRAM**

The IMAP orientation is a week-long session on the UWO campus. The various student participants are transported from their own universities (which are located across Canada) for the orientation session and then to their summer posting. Since many students are now recruited by Regions from local universities, it is essentially a round trip excursion for many students. In the course of this study, several Regional representatives indicated that they were unsure of the cost-effectiveness of the UWO session, particularly as a certain amount of further orientation is required both at the regional level and when the student is placed on assignment.

The study team also considers that the concept of a centralized orientation for all participating students probably was useful (and not too costly) when, in the early days of the program, all students were selected from UWO and

now may not be justifiable from the point of view of cost-effectiveness. However, it would be premature to recommend a revision (or elimination) of the orientation session without a full and independent assessment of the session and review of the various options.

It is recommended that:

**the week-long orientation program for IMAP at UWO be reviewed as to need, effectiveness and cost and other options for student orientation be considered.**

C. STUDENT SELECTION CRITERIA

Over the past few years, Indian students have been recruited as student consultants under IMAP. While this is viewed as a positive development by all involved, including the Indian clients of the service, it is to be noted that these students are often recruited from undergraduate colleges and business schools and, therefore, do not have the same educational background or skills as students recruited from graduate programs. Some Regional staff indicated that there are already several mechanisms for hiring native students for the summer period and that for IMAP the primary criterion in selecting students should be their academic level.

Given the input from the client group indicating a desire for more Native students and the focus of IMAP toward the development of consulting expertise, the study team considers that further review of this issue be undertaken. Recognizing the importance of maintaining the high level of qualification of students participating in IMAP, two options are available. Under the first option, Native students would only be involved in IMAP when they are at the requisite graduate level or under the following conditions:

- they are at an academic level approaching the program criteria, and demonstrate strong potential; and
- those who lack the basic academic qualifications are teamed with a graduate student in the field.

A second option would be to establish a separate program for Native students, which unlike IMAP, would have as its major aim the involvement of a large number of Native students and their development as consultant/advisors. These students would work under the guidance of IMAP graduate students as well as INAC officers.

The study team considers that the second option is most desirable and therefore recommends that:

**a program for the development of Native student consultant/ advisors be established to complement IMAP.**

The development of this program would be contracted to UWO or tendered to the university community.

D. STUDENT PLACEMENT

Two problems have been identified in relation to student placement: assignment of students at INAC Regional Offices, and, lack of projects.

i) INAC Regional Placement

Although the situation has improved in recent years, IMAP students are still assigned to work at the INAC Regional or District Offices in what amounts to a position as a term INAC employee. In at least 27 projects in the 1984 program year, INAC or another government office is identified as the client; four of the twenty-nine students in the program spent the entire summer working for an INAC Regional or District Office. Given the high calibre of many students and person-year constraints on INAC, it is recognized that there will be a strong temptation to utilize these student resources in INAC offices. However, the objectives of the program indicate clearly that the program is to provide direct service to Indian clients and such deviations should not occur. It is recommended that:

**I/IMDP ensure that IMAP is used to provide student consulting services to Indian clients only.**

ii) Project Assignment

Projects are identified, priorities are set, and assignments selected for IMAP students by INAC in close association with Band Councils (economic development workers) or Tribal Councils. While this process seems to work well, it appears that, on occasion, projects identified in the winter no longer exist or require assistance by the time the student arrives. As a result, students have noted that there are frequently slack periods, especially at the beginning of their summer assignment.

This situation could be improved by a more extensive identification of projects by INAC and Indian representatives as a means of contingency planning for unforeseen events. Given the reported level of demand for assistance from bands and individual enterprises, student consultants should be fully utilized on field assignments throughout the summer period. It is recommended that:

**the INAC Regional representatives for IMAP, in consultation with Indian organizations involved with the program, undertake contingency planning to ensure the IMAP students are fully utilized throughout the summer period.**

E. INDIAN INVOLVEMENT

As is noted in the previous item, Indian organizations (particularly Tribal Councils) are frequently consulted and involved in the decisions with respect to placement of IMAP students. The client assessment, however, seemed to indicate that bodies which represent Indian clients to be served by the program would like even greater involvement, in the selection of projects, in the selection of students, in matching students to client needs, and in on-going supervision of projects. It was also noted that the process of assigning the student to a Tribal Council, who then served clients at the band level as determined by the Tribal Council seemed to have worked well, except from the point of view of access to INAC travel funds. (This was the view of the Tribal Council representatives; student comment on this arrangement was not solicited). It is recommended that:

**representative bodies of the clients served by IMAP students be included as much as possible in all aspects of project and student management throughout the program cycle.**

F. CLIENT/CONSULTANT RELATIONSHIP

In the client assessment of IMAP, it was reported that the relationship between IMAP, the student sponsor (INAC or Tribal Council representative) and the client is largely informal. Only in a minority of instances were written terms of reference prepared and agreed to by the client. While a certain informality is beneficial in promoting responsiveness to client needs, it also appears that a lack of understanding on the part of the client about the nature and scope of the assignment was a major reason for dissatisfaction with the student consulting services. A short description of the problem and the work to be carried out would assist both the

client and the student in defining requirements and thus in improving the final result.

The project terms of reference could be used for communicating the work in progress to the INAC Regional or District Office, the Tribal Council or other Indian organization, and the student's faculty advisor. It would also familiarize both the Indian client and the student with the usual terms, conditions, and formal arrangements in the consulting relationship for future reference. It is recommended that:

**a written project description to serve as terms of reference between the IMAP student and the client be developed for each project.**

#### G. PROGRAM EXPANSION

As was indicated in the previous chapter, Indian clients have indicated an interest in expansion of the program in terms of the calendar time-frame, specialty disciplines, and numbers.

##### i) Time Frame

By accessing students from co-op programs that operate on a year-round semester system, IMAP could provide student advisory services on a year-round basis. This would, of course, involve an increase in program costs. It would also require accessing University programs which have graduate level co-op programs in administration such as the University of Victoria, Sherbrooke, and McMaster. Also, if the specialty disciplines accessed by the program were increased (see item below), several other universities could also be a source of student consultants.

##### ii) Specialty Disciplines

Although the assistance provided in business development and management support was recognized as the highest priority by program clients, it was also suggested that students coming from a variety of other disciplines could also provide valuable advice to the Indian community. Other disciplines suggested included:

- engineering
- community planning and development
- communications
- agriculture
- education



- iii) INAC Regional representatives indicated that an expansion in numbers of students would be desirable. UWO has indicated, however, that it can only accommodate the current number of about thirty students. If other arrangements are made for components of the program such as selection and orientation, program expansion should be feasible.

It is recommended that:

**the I/IMDP consider expansion of IMAP to include student consultants of a senior academic level from a variety of different disciplines in accordance with identified needs in the Indian community and increase the total number of students in the program. Consideration should also be given to deploying students from co-op programs so the service could be provided on a year-round basis.**

#### H. STUDENT REPORTING/CLIENT FEEDBACK

The reports provided by students on the results of their assignments are oriented to INAC or UWO rather than to the Indian client. However, most clients indicated that where reports were expected these were provided by the student. It is not known whether the reports received by the client are the same as those submitted to UWO. In any case, it appears that there is a need for some guidelines on the specific documentation that would be provided to clients for various tasks and a guideline for a project close-out report. These documents would assist INAC and Indian organizations in determining required follow-up action.

Also, there appears to be no mechanism in place for Indian clients to provide feedback on the assistance received. The level of enthusiasm on the part of clients generated by our requests for a response to the program in this study would seem to indicate that some on-going process of client feedback would be desirable. This could take place in questionnaire format (the one used for this study could be adapted), either completed directly by the client or by the INAC employee in discussion with the client. These should be filed as part of IMAP project records at the Regional level and used in adjusting and improving the program in subsequent years.

It is recommended that:

**the student close-out report be oriented to the client, taking the form perhaps of a report to the client, and that a client report on the assistance received be instituted.**

I. REGIONAL REPORTS TO NHQ

Currently, I/IMDP at NHQ receives student reports detailing work undertaken, some narrative comments by Regions, the UWO annual report. While this information is extremely useful, it is important that I/IMDP receive reports from the Regional and District representatives of INAC who supervised the students in the field that will assist in focussing on the key issues impacting on the program and subsequent decision-making. It is suggested that a standardized format be developed that will allow for basic program information, by program supervisor, on:

- number of student consulting days
- overall areas of advice/consultation
- client information:
  - # of clients served and nature of problems
  - time spent per project
  - summary of feedback from clients
- specific problems and recommendations for program improvement.

It is recommended that:

**I/IMDP implement a form of reporting on IMAP from Regions to assist NHQ in assessing the levels of activity and results on an on-going basis.**

### CONCLUSION

This review of IMAP has concluded that the basic objective and philosophy of a program of providing senior level students to act as advisors to Indian people appears to be sound. The recipients of IMAP advisory services consider the service to be valuable and INAC program managers see the student consultants as complementary to their programming. Some concern has been expressed by the INAC regions, however, about UWO administration of the program. In particular, the "value added" by UWO in its orientation session and the student selection process requires further review.

Following from the positive response to the program, the study team considers the expansion to the program in terms of numbers, time and scope of advice may be worth considering. This could be done by enlarging the range of student recruitment from just business schools into other speciality programs in universities operating on the co-op system. If an increasing number of Native students are to be recruited as consultant- advisors, it may be useful to establish another program, teamed with IMAP, which specifically targets these students and is designed to develop skilled and experienced Native student advisors. This would maintain levels of qualification as the primary means of entry into IMAP, while focussing over the long run on developing consulting expertise within the Indian community.

APPENDIX A

Members of the Advisory Services

Review Steering Committee

MEMBERS OF THE ADVISORY SERVICES REVIEW COMMITTEE

Indian and Northern Affairs Canada (INAC)

David Newhouse  
Director  
Indian/Inuit Management Development Program (I/IMDP)

Glen Barker  
Chief  
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Assembly of First Nations (AFN)

Harry Bombay  
Economic Development Advisor  
Assembly of First Nations

Alayne Bigwin  
Special Advisor  
Assembly of First Nations



APPENDIX B

IMAP Client Assessment:

Major Variable Analysis

IMAP CLIENT ASSESSMENT  
VARIABLE ANALYSIS

	YES	NO	DIDN'T KNOW/ NO COMMENT	TOTAL
1. Involvement of different parties in identification of project/task:				
- Client	5	34	--	39
- INAC	39	--	--	39
- Band/Indian Org.	17	22	--	39
2. Agreement Between Student and Client About Work to be carried out	22	11	6	39
3. Written terms of reference prepared	11	28	--	39
4. Skills displayed by student as expected and required	12	--	27	39
5. Involvement of different parties in supervision of student and project				
- Client	17	22	--	39
- INAC	27	12	--	39
- Band/Indian Org.	6	33	--	39
6. Written report at end of project	28	11	--	39
7. Client main beneficiary of service	32	7	--	39
8. Fully satisfied with final result	26	13	--	39
9. Client involvement in formal assessment of assignment	4	35	--	39

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READER'S NOTES