Rural Development Institute’s Regional Round Table Handbook

for the

Community Collaboration Process

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Rural Development Institute, Brandon University

Brandon University established the Rural Development Institute (RDI) in 1989 as an academic research center and a leading source of information on issues affecting rural communities in Western Canada and elsewhere. RDI functions as a not-for-profit research and development organization designed to promote, facilitate, coordinate, initiate and conduct multi-disciplinary academic and applied research on rural issues. The Institute provides an interface between academic research efforts and the community by acting as a conduit of rural research information and by facilitating community involvement in rural development. RDI projects are characterized by cooperative and collaborative efforts of multi-stakeholders.

The Institute has diverse research affiliations, and multiple community and government linkages related to its rural development mandate. RDI disseminates information to a variety of constituents and stakeholders and makes research information and results widely available to the public either in printed form or by means of public lectures, seminars, workshops and conferences. For more information, please visit [www.brandonu.ca/rdi](http://www.brandonu.ca/rdi).

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The Community Collaboration Project (CCP): Empowering Communities & Building Capacity is financially supported, in part, by the Government of Canada’s Rural Secretariat

On the last page of this handbook is a feedback form. We encourage you to complete it and send back to us. We really value your feedback.

Rural Development Institute

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Preamble

In 1999, the Community Collaboration Project (CCP) in Manitoba and Nunavut began with initial funding from Health Canada and Environment Canada and was facilitated by the Rural Development Institute (RDI) of Brandon University. The CCP was a collaborative arrangement between communities in four regions of Manitoba and the Kivalliq region of Nunavut, federal, provincial and territorial government departments and agencies, non-government organizations and RDI. Four Regional Round Tables (RRTs) emerged from this process, each with unique and different priorities, goals and projects, yet similar in how they underwent community collaboration. Outcomes included creation of new partnerships among RRT members and stakeholders; trusting relationships and increased communication between the community members and government officials; leadership development within the RRTs and the steering committee; increased capacity within the RRTs and steering committee; and exploration into new models of decision-making and governance among communities and governments. The Manitoba/Nunavut RRTs and steering committee considered the community collaboration process a success because it engaged participants; brought communities together and provided mutual learning experiences in community-government relations (Walsh, 2004).

In 2005, RDI began a research project to test the applicability and replicability of the CCP model elsewhere in rural and/or northern Canada. Through the Government of Canada’s Rural Secretariat, RDI received funding to support the development of three new RRTs. Site selection criteria included: the groups of communities had the desire and a commitment to work together in new and different ways to achieve common goals; the groups of communities are located in rural or northern areas; leaders within the communities were prepared to actively engage in the creation of the RRT; and the communities and organizations that serve them agreed to commit in-kind and cash resources to the process of forming, organizing and sustaining RRTs. RRTs, in Saskatchewan, northeastern British Columbia and the Yukon, are now emerging as a result of this initiative.

RDI created this handbook of information and tools for the RRTs to use as they planned and implemented their collaborative evaluations. There are several sections of the handbook: the first three sections provide background information about the community collaboration process, partnerships and collaborative evaluation; the fourth section is a tools and resources section that can be reproduced. We have used an analogy of a canoe trip to describe the collaborative process. This collaborative process is not unlike undertaking a canoeing expedition with many friends and new acquaintances. For some it is a journey down familiar rivers and lakes with people they know well; however, for others it is a journey into the unknown with people they have just met. Where Are We Going? talks about starting the journey and the stages a group goes through in preparing for and beginning the journey. Who is Traveling With Us? describes the partnership building and strengthening process that we undergo as we travel along this journey. How Are We Doing? explains the collaborative approach to evaluation and walks us through the collaborative evaluation process. We have excerpted, adapted and added to the Rural Secretariat’s “The Models Program “Roadmap” to Participatory Evaluation” guidebook in this section. The Tools & Resources section is a compilation of many samples, templates, worksheets and resource lists that can be replicated, adapted or modified to fit your particular need.
The Community Collaboration Journey

Introduction

Communities collaborating together in community development processes can increase their capacity to improve quality of life, better manage change and sustain long-term well-being.

Communities building partnerships through regional associations such as RRTs have opportunities for new forms of collaboration and governance. With access to the appropriate tools, resources and information, individuals living in rural and northern communities can engage in self-sustaining, informed, local decision-making and meaningful dialogue between and among communities, organizations and governments. The emphasis of the community collaboration process is a community-led approach to decision-making. Representatives and stakeholders from several communities come together to identify regional socio-economic opportunities and challenges, find common solutions, and implement programs and projects that address regional needs.

The formation and sustaining of an inter-community association such as a RRT is a process that evolves over time. The process begins with communities in a region coming together to explore new and different relationships with each other. Often, an external facilitator facilitates and documents the formation and visioning sessions to enable all stakeholders to participate freely. As the process progresses to agenda setting, the facilitation shifts to the RRT with the external facilitator providing support. By the time the RRT is in a position to take on projects and seek resources to support those projects, external facilitation should no longer be needed. As the process evolves, the RRT moves to a self-sustaining position from which it is able to operate independently of external facilitation.
Getting Started

Every member of a community collaboration association wants to be part of a smooth-running unit. However, not all associations reach that goal. Some make progress toward it, while others have trouble getting everyone to work together. Successful groups take time to develop, and each group develops differently. One way to view the group as it grows from a collection of individual communities to an effective regional association is to focus on the stages of development. These stages could be compared to a journey — perhaps a canoe trip. The journey isn’t always smooth paddling, nor going directly from home to journey’s end. Along the way there are storms, rapids, shoals and portages to overcome. There are bends in the river, and interesting things to see along the way. New paddlers may join along the way, while experienced paddlers may forge ahead or head in different directions.

Going in Circles

Starting a community collaboration association is much like starting a canoe trip with several canoes and many paddlers embarking on the journey. Launching the canoes signal the beginning of an adventure, but in the beginning, a lot of things may be unknown. The paddlers might not know each other very well, if at all. They ask themselves: Where are we going? How long will it take? Who is going? How do we get there? How are we going to be partnered for each canoe? Who’s in charge? What are we supposed to do? and How do we stay in touch with those back home? Similarly, in the community collaboration process, you will be starting an adventure with many aspects still unknown. You and your traveling companions will need to make several decisions as you start your journey. As you are planning your canoe trip you will need to think about what and when to tell your friends and family how your trip is progressing. Similarly, you will need to figure out how, what and when to communicate to those in your home communities. What are you going to say to those on shore who see you pass by and to those you encounter along the way? You will need think through and develop a communication plan.
There is an old saying, *if you don't know where you are going, anywhere will do and you won't know when you get there.* To have a harmonious journey you and your traveling companions will need to have a **shared vision** of where you will be going. You can’t go on a canoe trip together if some of you want to go in one direction, and the others in another direction. You will need to achieve consensus as to the destination, as well as when to embark on the journey. This might be a short discussion, or a longer one depending on where everyone wants to go. Similarly on the community collaboration journey, all partners in the process should share the vision of where they want to go and what they want to accomplish collectively. Many questions need to be answered. What skills, supplies and equipment do you need for the journey and what skills, supplies and equipment do each of you bring? Are there gaps, and if so, how do you close those the gaps?  In the community collaboration journey, this process is called **visioning** and is facilitated by a skilled facilitator who has been on this journey before.

**Getting on Course**

As you formulate your vision, you will begin to know, generally, in what direction you are heading. However, you will need to plan your journey to accomplish that vision. That plan starts with setting a **goal**. Your goal describes what it is that you hope to accomplish on your journey and reflects your group’s priorities. You’ll need to come to consensus on what supplies you have available, what you need to purchase to take with you, and what you can gather from the land as you go along. You’ll need to decide what size and type of canoe you will need, how much time you will have for the trip. You will need to realistically determine what you can accomplish, anticipate where the rapids and shoals are that you may face and your chances of successfully carrying out your journey. You’ll then need to set **objectives**. Objectives are closely related to your goals and operationalize your journey. They are usually short-term and so that once the objectives have been reached, you know your goal has been reached as well (You can “measure” the accomplishment). Before you get your feet wet, you are going to need to think about what you are going to do each day to accomplish your goals and objectives. For example, before you start your canoe trip, you are likely going to call a meeting of everyone involved to talk about the vision, goals and objectives. Once you are underway, you are going to have figure out what you need to do and who will do it---who paddles, who sets up camp, who cooks, etc. These are referred to as **activities** or actions. In the community collaboration process, you will need to figure out what activities it will take to accomplish your vision, goals and objectives. Again, it would likely start with a meeting as you would do for your canoe journey. Once you are on the CCP journey, all members may carry some of the activities out, while other activities may be designated to certain communities or individuals.

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You will need to think about what tangible “products” you will get out of your journey. On your canoe trip they might be a collection of wildlife photographs, or perhaps a meal with the local people partway through your journey. These are referred to as **outputs** or **products**, which are the tangible things that happen along the way and are a direct result of the activities. Your activities and outputs should generate some type of change or benefit for you. **Outcomes** are the changes, improvements and benefits that occur as a result of the
journey. If an output (product) of your journey were a meal with local people, perhaps an outcome would be a better understanding of their community.

As you set out on your journey, it is useful to have a master plan, which provides you with a means to follow and evaluate your trip. Using this plan makes it much easier to stay on course and make adjustments along the way if you need to. It can also show you where to look for evidence that you have accomplished your goals and objectives. Your community collaboration process can be outlined in a logic model, which is a useful master plan for your journey. You can outline your journey using a planning worksheet, which serves as guide for checking on how you are doing enroute and for determining if you have accomplished your goal and objectives as planned. You may want to expand your Planning Worksheet into a workplan. The workplan is a blueprint for action that identifies what you hope to achieve, how you intend to make it happen, when you are going to do it, who will do it and makes sure it gets done, and how and when you will measure your results. The workplan specifies the tasks that need to be completed to reach the objectives; the order for undertaking tasks; the time frame for completing the tasks with milestones for specific events or activities; the resources need to reach the objectives, including people, materials, facilities and funds; and the group members who are responsible for completing the individual tasks.

How will you know how you are doing as you travel down the river, and if you have achieved what you set out to do? You will need to evaluate how you are doing as you travel along so that you can make course changes if you need to. Because there is more than one of you on the journey, you will need everyone involved to participate in this evaluation. Everyone has information and unique perspectives of how you are doing which will contribute to the overall quality of the experience. You will need some indication of what is working, what isn’t working, and what outcomes have occurred. Indicators are evidence, proof or information that show progress in attaining your goals, objectives and outcomes. The indicators (evidence) may be concrete and can be counted (measurable), such as how many kilometers you traveled each day (quantitative). An anticipated outcome of your canoe trip might be a greater appreciation for the natural environment. Indicators of that may found be in the stories that you tell about what changed in your thinking during and after your journey (qualitative). If you determine what the possible indicators might be before you start your journey, you will be able to look for them as you travel down the river. Similarly, as you embark on the community collaboration process, you will need to know where you are going, what resources you have and how you plan on getting there. You will need to evaluate as you travel along involving all of the stakeholders in the process.
**Full Speed Ahead**

As the paddlers get on course and become used to each other on their canoe trip, they find they are now able to work together. They are paddling full speed ahead in unison together, and, in doing so, making real progress toward their destination. They are using each other’s ideas, giving and receiving constructive feedback, setting and following crew ground rules and norms, and valuing individual differences. They are working together, anticipating and coping with storms, dealing with the rapids and shoals and are reaching their destination. They are excited about their journey not only because they know they will reach their destination, but also because they know they did through collaborative effort. Being part of the group energizes them. They enjoy working together and are fully committed to the group, secure in relying on each other. Similarly as a regional round table comes together with a common vision, works together to accomplish that vision, and the regional round table becomes greater than the sum of its parts.
Building and Strengthening Partnerships

Traveling on a canoe trip with others requires you to form partnerships with those who are embarking on the journey with you. Similarly on your community collaboration journey, your community or group will want to partner with other communities or groups to travel with you as you journey along. In addition the advisory group is undertaking the journey with you. They are also building partnerships between and among governments, community-serving organizations and academic institutions. Even though they may be “in their own boat” on the journey, they are accompanying you on your journey; at times linking you to other partners, as well as pathfinding new and different routes that you may not have taken before. From time to time, as you paddle along, the regional round table and the advisory group may decide to camp together, spending time strengthening the partnership.

A partnership is an agreement to combine resources, ideas and talents to do something together that will benefit all involved. The partnership adds value to each partner’s respective situation. There is give and take with shared decision-making, risks, resources, investment, power, benefits, burdens and accountability. There are many benefits of working together, including increased community ownership; increased efficiency and effectiveness in the use of resources; development of strengths through diversity; coordination of activities; and a united front – acting together. Successful partnerships (✱), have:

- a Reason to come together; a common vision and goal;
- Rules – ways of doing business together;
- Responsibilities – every partner is responsible for and contributes to the outcomes;
- Respect – every partner is respected and valued;
- Reward – every partner understands their gain -- the WIIFM What’s In It For Me?;
- a trusting Relationship – partners have developed a trusting relationship between and amongst themselves;
- Results – the partnership accomplishes its collective vision and goals;
- Rejuvenated – the partnership is evaluated, successes are celebrated and reflected upon; and
- Re-tooled - the partnership is adjusted as needed.
Problem Solving

Problem solving is something we do all the time. Some problems are small and solutions evolve automatically. Other problems are more complicated and require extra time and effort to come up with an appropriate solution. As you continue the community collaboration journey, you will undoubtedly encounter problems. Anticipating problems and having an agreed-upon process to deal with problems will enable you to have a smoother journey. The following five steps are an example of a problem-solving methodology:

Identify, analyze and clarify the problem.
- Involve all stakeholders.
- How/when did the problem originate?
- Who is involved with this problem and how?
- How does this problem affect the group?
- What other problems are related to this situation?
- What would you like to see changed?
- Who has the power to make changes?
- What do we have going for us in the group that will help make changes to this situation?
- What do we have going on in the group that may sabotage us in making changes?

Generate possible solutions.
- Within the group, brainstorm as many solutions as possible.
- Do not editorialize or comment on the suggestions.
- Write down all the possible solutions on a flipchart for all to see.
- Encourage group members to think “outside the box” or beyond their conventional ways.

Select the best solution.
- Use a Solutions Matrix. (✘)
- Analyze each solution suggestion according to predetermined criteria.
- Once the Solutions Matrix is completed, pick the best solution that is closest to your solution requirements.

Plan and implement the solution.
- Write down the steps to be taken.
- Number the steps in the order they need to be done.
- Add to each step:
  - why the step is important;
  - what needs to be done;
  - where should it be done;
  - who is responsible;
  - when will the task need to be completed; and
  - how the step will be completed.

Evaluate the results.
- Have you solved the problem?
- Do you need to try something else?
- What could you have done differently?
Achieving Consensus

Consensus ($\wedge$) is a decision-making process which best reflects the thinking of all of the group members. Each individual should be able to find the decision acceptable and support it. As you paddle down the river, you will undoubtedly have several choices to make along the way. Perhaps you come to a fork in the river and need to decide which way to go. Everyone will have an opinion of why one way or the other is the way to go, however, if you intend to stay together for the journey, you will need to reach consensus as to which way is the right way to go. You will discuss the options and the reasons for those options and collectively decide your course of action, based on what people can be comfortable with. It may not be your first choice; however, you can live with the decision and can support it once it is made. As your community collaboration group undertakes its journey, you will also need to reach consensus on the direction you are going and how you will get there. In achieving consensus, you move from competition to cooperation; from distrust to mutual trust; from personal ownership to common ownership; from suppressed feelings to avoiding conflict to valuing discussion and disagreement; from relying on authority to equalizing of power; and from valuing the input of a few to valuing the contributions of all.

Guidelines for Achieving Consensus

Achieving consensus takes practice, and it takes time. People need to be comfortable with the decision that is collectively arrived at. Guidelines for achieving consensus include:

- Avoid arguing your own position. Present your position, but listen to other member’s reactions and consider them carefully.
- Do not assume that someone must win and someone must lose if the discussion reaches a stalemate. Instead, look for the next most acceptable alternative for all parties.
- Do not change your mind simply to avoid conflict and reach agreement and harmony. When agreement seems to come too quickly and easily, be suspicious.
- Explore all the reasons and be sure everyone accepts the solution for basically similar or complementary reasons. Yield only to positions that have objective and logically sound foundations. Avoid conflict-reducing techniques such as majority vote, averages, coin flips, or bargaining. When a dissenting member finally agrees, don’t feel that he or she must be rewarded by having his or her own way at some later point.
- Differences of opinion are natural and expected. Seek them out and try to involve everyone in the decision-making process.
- Disagreements can help the group’s decision because with a wide range of information and opinions, there is a greater chance that the group will come up with more adequate solutions.
- Use observation to check for agreement. Use eye contact and watch group members’ body language for clues as to whether they agree or not.
**Steps for Achieving Consensus**

Steps for achieving consensus include:

- **Develop criteria** that the solution needs to meet before the group discusses solutions, so everyone will know how to interpret the information. Keep the criteria visible – on a flip chart or poster.

- **Share** information. Conduct a round-robin discussion and solicit ideas from each member. This gathers input from all members. Record the suggested ideas.

- **Learn and listen.** Individuals may ask for clarification of solution suggestions. This is not a time for debate or argument, simply to clarify.

- **Analyze** alternatives. Gather information on the strengths and weaknesses of all proposed ideas, as well as how hard or easy they will be to implement. Analyze the similarities and differences among alternatives. Any known data/facts can be incorporated into the key points.

- **Think creatively.** Look for ways to combine parts of different ideas.

- **Decide** -- consensus does not mean that everyone is necessarily happy with the decision. It does mean that all group members feel they can support the decision, even if it is not their first choice. Allow people time to carefully consider the pro’s and con’s of the various alternatives and to check with others outside the group, if necessary.

**Building Trust**

As you journey down the river on your canoe trip, trusting relationships are essential to the success of the trip, and indeed to your own personal comfort and safety. You must trust those in the lead canoe to be aware of the hazards that they can see, and you’ll need to trust their decision on how they approach those hazards. You’ll also need to trust that your partner in your canoe contributes to paddling and steering the canoe in harmony with yourself. Similarly relationships that develop among and between communities and governments in the community collaboration journey can only manifest as a result of trust (Reflections on Manitoba’s Community Collaboration Project, Walsh, 2004). Trust is necessary between the communities that come together as regional round tables and it is necessary in the relationship with other partners such as advisory groups and academic institutions. Trust is difficult to achieve when there’s no perception of “we’re all in this together”. When trust does exist, there are positive payoffs for everyone involved. A cycle of mistrust often occurs when two people/groups in an untrusting relationship believe the other person/group is at fault - that the other person or group did something untrustworthy first, and both parties think the other party should admit fault. You can’t establish trust by changing other people. What you can do is allow others to develop stronger trust in you.

**T R U S T**

begins with **YOU and me.**
Trust Traps

It’s not difficult to see what other people do that’s untrustworthy. The real challenge is to recognize what we do that is untrustworthy. Everything we do has some effect on the trust people have in us. Sometimes, a single action can damage trust, and decreased trust means decreased success for you and your group. However, by recognizing and avoiding the trust traps, you won’t be part of the problem. When you push responsibility for trust onto others--and they do the same to you--a cycle of mistrust may be created and neither of you gets anywhere. When you’re willing to move--and break the cycle--people will move with you. There are several trust traps that you can fall into. They include:

Making Assumptions
If you jump to a conclusion without having the facts to back it up, you can fail to generate trust in others, and/or you can break a trust that you have already established. This can cause you to relate to people negatively and in turn causes people to respond to you negatively. It can make you appear unreasonable, and people decide you can’t be trusted to seek and act on facts. It is especially damaging if you share your negative ideas with others, who believe your ideas and act negatively because of them.

Breaking Promises
This means not doing what you say you’ll do and of all the trust traps, it has the quickest and most damaging effects on trust. Breaking even small promises can damage trust because people quickly assume they can’t rely on you. This is often caused by over-commitment by trying to spread your time and energy over too many things or trying to please too many people.

Bypassing People
Not dealing with someone first, even though you should, because you think you won’t get what you want can lead to mistrust. It makes people feel you don’t trust them enough to involve them. The effects are the same even if you’re just trying to save someone some work, and it can cause people to make your future requests for help a low priority; they assume you’ll get what you want without them anyway.

Trust-Building Techniques
There are trust-building techniques that you can practice to enhance trust. They include:

Testing your assumptions
Recognize your assumptions and test them by seeking information and checking your understanding. If someone is telling you something, ask them to simply repeat what they’ve said and then verify what you heard by paraphrasing what you heard back to them. By testing your assumptions, you will ensure that you and the people you meet with consistently share a clear, common understanding of ideas, agreements, actions & outcomes.

Being open and honest
To be trusted, you have to be open. You have to let people know what you’re thinking, and what your reasons are for doing what you do. Otherwise, they’ll just assume -- and maybe assume the worst: that you’re just looking out for yourself and maybe you can’t be trusted to think about their needs and interests. By showing people that you’re open and honest, you assure then that their needs and interests -- not just your own -- are important to you.
**Making commitments you can keep**
Making commitments that can be kept ensure that everyone involved in a commitment has matching expectations about what’s going to be done. This greatly reduces the risk of over committing and breaking promises. Ensure matching expectations by specifically describing:

- who will be responsible for what results;
- what specific results are needed; and
- when results will be provided: date, time and place.

Put these details in writing. When you clearly specify who, what, and when, others know what to expect from you and you will know what to expect from them.

**Admitting mistakes**
Sometimes covering up even small errors will make them much worse and damage other’s trust in us. Because we all make mistakes, it’s better to be imperfect and honest than imperfect and dishonest. The benefits of admitting a mistake are that quick, effective action to minimize the negative effects of errors can be taken and people don’t waste valuable time, effort, and money trying to find out what went wrong and how to fix it.

**Managing Conflict**
Conflict is something that groups can count on. It can be a positive element for the group because without it, people would not be challenged to think beyond their everyday routine boundaries. Conflict can also be negative and adversely affect the group. Rather than trying to avoid it, look at conflict as an opportunity for the group to become a productive team. It is important that conflict be recognized, accepted and worked through. If conflict is ignored, group members may stop participating, or even leave. Conflict often evolves through stages and recognizing and understanding what may be happening is the first step to resolving the situation effectively.

**Conflict Stages**

**Differences** – Tension development
There are different points of view, values, and goals. Tensions start to develop. Signs include: people are spending more time telling than asking and listening and are not as tolerant of others’ differences as they once were.

**Discord** – Role dilemma
People are starting to look out for individual interests. They are trying to decide if they should take sides, and if so, which one. A win-lose starts to build up. Signs include: people are less willing to communicate in a solutions-oriented manner; are starting to become defensive about their ideas and start to take sides; problems are itemized and people start to justify their positions; and people are starting to think of ways to win.

**Dispute** – Confrontation
People meet head on and clash. If both parties hold fast to their side, the showdown may cause permanent barriers. People engage in pettiness, confrontations, hostility, silent resignation, and even sabotage. Signs include: people are more concerned about winning than making the best decisions and common goals give way to personal goals.
**Conflict Resolution Guidelines**

Recognizing a conflict or potential conflict is the first step to resolution. The following guidelines may help resolve a conflict in a positive way:

- Issues become polarized when there is little or no dialogue. Initiate discussion and dialogue, encouraging participation.
- Every side usually has something valuable to say so listen to both sides equally.
- People often feel their story has not been heard. Listen to each person’s needs, and ensure each person listens to each other.
- Underneath incompatible positions lie compatible interests so look for and reach the compatible interests.
- Conflict creates emotions and feelings that are barriers to progress. Identify and understand the emotions, and move the discussion to approaches, strategies and desired outcomes.
- High emotions often charge the issue. Create an environment where people can express their feelings and concerns without judgment.
- People may become defensive and protect, justify or explain their position. Search for solutions: seek to understand but remind them of the need to move on.
- People will immediately want to discuss their individual needs. Only after good-will has been established, should needs be discussed.
- People will focus on differences. Ask them to identify areas they have in common, remind them, and expect progress.
- Identifying and understanding the desired outcomes will result in progress. Step back and ask the people involved what they want the outcome to be, and list the desired outcomes.

**Conducting Effective Meetings**

From time to time you will need to meet with your partners to exchange information and make decision. A well-run meeting is one of the best ways for people to exchange information, generate ideas and check their understanding of issues. Good meetings are planned and managed and will enable you to get on with your journey.

**Meeting Guidelines**

- Determine the **roles**:
  - organizer/coordinator;
  - chairperson/leader/facilitator; and
  - recorder/minute taker

- Decide on and communicate the meeting’s **purpose**:
  - the meeting’s purpose is a critical element to getting and keeping the group on track and it guides the group’s actions.

- **Plan** the meeting:
  - a well-planned meeting will affect the results.
  - If written reports and materials are needed for a productive meeting, ensure that they are prepared, copied and distributed prior to the meeting so people can review them ahead of time and be prepared for discussion at the meeting.
• Develop an *agenda*, seeking input from all partners, and distribute it before the meeting, if possible:
  • an agenda is a step-by-step outline of the points that need to be covered at a meeting. It is the meeting tool that keeps the meeting on task and on time:
    • ask for input;
    • establish a “cut-off” date for items to be added to the agenda;
    • distribute the agenda in advance so participants can prepare for the meeting; and
    • place agenda items in such an order that the most important tasks are dealt with first.

• **Record** the meeting:
  • minutes provide a permanent record of the proceedings of the meeting, keep track of progress and inform absent members. A basic set of minutes include: the name of the group; when and where the group met; who was invited and who was present; who chaired the meeting; adoption of the last meeting’s minutes; the matters discussed and any decisions that were made; agenda items for the next meeting; the time and place for the next meeting; and the recorder’s name.
Why Evaluate?
As you travel along, you will want to know how you are doing. It is much easier to fix a problem if you see it early on. It also makes the journey more enjoyable if you recognize and celebrate your successes. You will also want to do that in the community collaboration journey. Evaluating how you are doing as you go along provides an opportunity to learn about what is working, what isn’t, and what needs to be altered in the process. There are numerous opportunities for evaluations to take place and contribute towards improving understanding and implementation. Some evaluations are done early on in a process to get a better understanding about what is happening on the ground and how the process can be improved. Evaluations can also be done later on the process to find out if the intended results have been reached. Other evaluations are set up at key points in the process to ensure reflection and re-focusing is done as a group moves forward.

What is the Collaborative Approach?
The collaborative approach in evaluation strengthens the capacity of everybody participating in the process through their involvement in decision-making and follow-up activities. Principles of the collaboration approach are:

- **Inclusion** – of representatives of all groups who will be involved in the evaluation;
- **Equal partnership** – recognizing that every person has skill, ability and initiative and has equal right to participate in the process;
- **Transparency** – all participants must help to create a climate conducive to open communication and building dialogue;
- **Shared power** – authority and power must be balanced evenly between all stakeholders to avoid the domination of one party;
- **Shared responsibility** – all stakeholders have equal responsibility for decisions that are made, and each have clear responsibilities within the process;
- **Empowerment** – participants with special skills should be encouraged to take responsibility for tasks within their specialty, but should also encourage others to also be involved to promote mutual learning and empowerment.
- **Cooperation** – sharing everybody’s strengths reduces everybody’s weaknesses.
What is Collaborative Evaluation?
The collaborative approach has grown out of a desire for monitoring and evaluation to be simple and inclusive of the people who are involved. Collaborative evaluation can therefore be defined as:

*An assessment process that includes all stakeholders in deciding what will constitute success and how it will be measured.*

This means that stakeholders are involved in determining the evaluation guidelines, the selection of indicators, collection of information (data) and evaluation of findings. It is an ongoing collaborative process that builds on people’s strengths and values the contribution of everyone involved and focuses on learning, success and action. Effective community collaboration evaluation will account for what has been accomplished, identify strategies that worked and those that didn’t work, give insight for adjusting the community collaboration process, provide feedback for decision-makers at all levels, and contribute to the body of knowledge about community development. (Health Canada, 1996). Evaluation takes time, effort and resources, but needs not to be onerous. When determining a regional round table’s success, stakeholders need to ask the following questions:

- Are we doing what we said we would do?
- What is working?
- What isn’t working?
- What has changed?
  - knowledge? attitudes? skills? behaviours?
  - Are there unexpected changes?
- What can be done differently in the future or another time?
- What difference are we making?
- What else can we learn from the findings? (Health Canada, 1996).

Process evaluation is not linear. It does not occur at the end, but rather continuously throughout. The questions in the previous paragraph need to be continually asked of the participating communities and other stakeholders. Framing these questions within a continuous cycle of reflection enables the members of a collaborative association such as a regional round table to make adjustments to the process along the way. The evaluation framework encompasses all of the elements of a process evaluation and provides a systematic map to continuously look at outcomes, results and impacts. Evaluating outcomes as they occur provide the opportunity to adjust the process if needed, modifying the goals, objectives and actions, or perhaps creating new ones. The evidence gathered throughout the evaluation process should enable a regional round table to determine how the capacity of the group and its member communities has been strengthened.
Collaborative evaluation by nature is meant to be flexible and adaptable. This allows, to the greatest extent possible, different needs and expectations of everyone involved in the process to be accommodated. Based on the aspects already discussed, a collaborative approach to evaluation will have the following elements:

- everyone with a stake in the group is involved directly in its evaluation;
- the focus is on the group’s goals and the shorter term results;
- at the beginning of the process, the partners take stock of what the current situation is;
- partners have a say in developing the goals and results of the groups;
- during implementation, results are recognized quickly based on the monitoring;
- evaluations provide new information;
- the process is not perfect, however it is a reliable way to facilitate realistic and practical observation and evaluation, with all partners’ perspectives taken into account; and
- results are shared and discussed during the process, and provide the opportunity to change course at any point.
What are Evaluation Principles and Values?

**Principles**
Principles that guide the collaborative process include:
- shared purpose;
- inclusion, not exclusion;
- voluntary participation;
- designed by those involved;
- flexible;
- equal opportunity;
- respect for the different interests;
- accountability;
- within time limits; and
- collective will to make it happen.

This list is not exclusive, and may be altered depending on the group that is involved. Discussions need take place around principles to ensure that the people involved share a common understanding and agree upon the evaluation principles.

**Values**
The underlying values of collaborative evaluation are that all stakeholders:
- add value to the process and the evaluation;
- have particular goals for their group or association;
- need/want to know results for their own purposes; and
- should have a voice at the table with regard to deciding the performance measures and indicators, and throughout the evaluation process.

The various stakeholders involved need to recognize and believe in these principles and values. If they agree on the beliefs that are guiding the process, it will ensure that meaningful participation becomes something that is built into the process and sought by all stakeholders.

**What do Stakeholders Contribute to the Evaluation Process?**
Each stakeholder brings unique assets including:
- knowledge, expertise and talent;
- financial resources;
- people - including associations and networks; and
- physical assets such as land and property.

Recognizing the different assets that are brought to the table is one step in the evaluation process. Participants also have to recognize that each asset is valuable, and that no one asset is more important than another.
Ethics

Principles
Before commencing a collaborative evaluation process, all stakeholders need to have a clear understanding of the ethical principles that will be utilized throughout the process. These principles should guide the entire collaborative evaluation process not just individual components. These ethical principles provide clarity on the rights and responsibilities associated with collecting, disseminating, accessing, and protecting information that is collected. The principles need to be mutually agreed upon by all stakeholders. Depending on the collaborative spirit and existing relationships amongst the stakeholders, the guiding principles may vary in length and detail.

This section outlines the ethical principles that apply to university-based research, describes how to develop guiding principles for a collaborative evaluation process, and provides examples of principles utilized by selected organizations.

Tri-Council Policy Statement – Guidelines for All Universities in Canada
Universities across Canada conduct all research based on the ethical requirements outlined in the *Tri-Council Policy Statement: Ethical Conduct for Research Involving Humans* (www.pre.ethics.gc.ca). In accordance with this policy, all potential research must be vetted through a research ethics board to ensure that potential research meets the requirements set forth in the Tri-Council Policy Statement. The Tri-Council Policy statement was developed on the guiding principles of:
- respect for human dignity;
- respect for free and informed consent;
- respect for vulnerable persons;
- respect for privacy and confidentiality;
- respect for justice and inclusiveness; and
- balanced risk (minimizing harm and maximizing benefit).

The Tri-Council Policy Statement ensures that when information is collected, the participants involved are knowledgeable about the purpose of the research, the name of the researcher(s), the potential benefits of the research, the tasks to be performed by participants, any anticipated inconveniences to participants, the rights of participants, the right to refuse or withdraw from the research, and the right to confidentiality of personal information. The Tri-Council Policy Statement provides the following guidelines for data storage, data handling, confidentiality/anonymity, and voluntary participation.

**Data Storage** – The principal researcher must securely store and retain the information for a period of five years.

**Data Handling** – Data must be handled and transferred in ways that ensure privacy and security. All individuals or organizations engaged in information collection or analysis should sign an agreement or an oath to ensure the privacy and security of the information.
Confidentiality/Anonymity – Researchers must inform participants the measures that will be taken to protect their anonymity/confidentiality. Researchers need to inform participants if and how the research findings will be shared in reports and publications.

Voluntary Participation – Researchers must ensure that participants participate voluntarily.

Other Considerations for conducting research within communities include:
- respect for the culture and traditions;
- conceptualize and conduct research as a partnership with community
- consult members of the community who have relevant experiences;
- involve the community in the design of the project;
- examine how the research may be shaped to address the needs and concerns of the community;
- ensure that the emphasis of the research and the ways chosen to conduct it respect the many viewpoints of different segments of the community;
- providing the community with information respecting protection of the community’s cultural estate; preliminary reports; potential employment; collaboration with community institutions; data handling and storage;
- acknowledge in the publication of the research results the various viewpoints of the community on the topics researched; and
- provide the community an opportunity to react and respond to the research findings before the completion of the final report.

(From the Tri-Council Policy Statement: Ethical Conduct for Research Involving Humans)

Guidelines

An agreed-upon guideline for the collaborative evaluation process is an important step. Groups often find value in examining existing ethics guidelines, which could be from one of their stakeholders or from external organizations. Regardless of the source, it is important to design a guideline that will serve all stakeholders for the purpose of the collaborative evaluation process.

In developing these guidelines, it is important to identify all stakeholders that will be involved in the collaborative evaluation process. Stakeholders may include communities, First Nations, municipalities, local organizations, non-governmental organizations, academic institutions and government departments/agencies. Each stakeholder needs to be aware and engaged in creating the guidelines. Each stakeholder needs to understand the mandates and parameters of their organization and of the other stakeholders so that the guidelines for the collaborative evaluation process can be accurately drafted.

Rather than recreating the wheel and to save time and energy, groups are encouraged to seek out existing guidelines from one of their stakeholders or external organizations. There is no ‘standard’; rather, the guidelines need to address the issues of all stakeholders. Sometimes this can be accomplished in a single page letter outlining the guiding principles between stakeholders and on other occasions it might be a multiple page agreement with great detail. The length and detail required are based on the needs and comfort levels of stakeholders.
The guidelines may be formalized in a variety of different forms, such as Memoranda of Understanding (MOU), Terms of Reference (ToR), Letters of Agreement (LOA) and research agreements. Samples of these types of documents have been included in the Tools & Resources section. These include samples from the, Rural Development Institute ( ), University of Northern British Columbia ( ), University of Regina ( ), University of Saskatchewan, ( ) Canadian Institutes of Health Research ( ), and the International Development Research Centre ( ).

Having these guidelines in place before commencing the information collection process will assist groups in providing clear direction and guidance. It is recommended that the guidelines be revisited from time to time to make sure they are current and sufficient for the collaborative evaluation process.

**The “Roadmap” to Collaborative Evaluation**

Evaluation is a natural process that helps people figure out why something is going well or what changes might help it go better. There is no “right” way of evaluating a process, but there are a lot of tried and true approaches that have helped people complete the process and acquire valuable information for current and future use.

Although there is no single way to perform an evaluation, it can be helpful to have a roadmap that helps to ensure that all the important aspects of an evaluation are included, results are accurate, and conclusions will be helpful to yourself and others. This does not mean that it has to be complicated; in fact if the steps in an evaluation process are followed by sincere, thoughtful participants the results can be amazing.

**Questions to Ask in an Evaluation**

![Roadmap Diagram]

From the diagram you can see that evaluation is an ongoing process. You cannot move onto the next step unless the previous one has been completed. For example, you cannot gather the information you need unless you have identified what information it is that you are looking for.

The roadmap illustrates that the findings are used to improve your group evaluation process continues again. This is a learning cycle. Throughout the cycle, stakeholders are expected to
contribute and participate. Through this participation, not only do the findings of the evaluation more accurately reflect the reality on the ground, but the skills of the participants required to carry out the evaluation are strengthened. Some of the skills that are enhanced are decision-making, collaboration, prioritization, analysis, and networking. These skills that are developed in the evaluation process can also be very useful in other aspects of project management.

**Steps in the Evaluation Process**

1. **What are we trying to do?**
   - Develop an evaluation logic model (ฆ) and write your: goals, objectives, activities, outputs/deliverables and outcomes

2. **How will we know if we did what we said we would do?**
   - Develop a data collection worksheet (ฆ) and determine your indicators--quantitative and qualitative.

3. **How can we get the information we need?**
   - Determine and decide:
     - Who has the information? (data sources)
     - How will the information be collected (method of data collection)
     - What type of evaluation tools do we need?
     - How often will the information be collected? (frequency)
     - Who collects the information? (responsibility)

4. **What does the information tell us?**
   - Compile and analyze the information and draw conclusions

5. **How can we use the information?**
   - Use the information learn from and improve the process, and provide information to all stakeholders about the process.
1. What are we trying to do?

The first things you have to do is finalize and agree upon what you are trying to do within your group. This is your vision/mission and will contribute towards developing a framework that will guide the implementation of the group.

Create a Workplan

The workplan ( şeklin ) is a blueprint for action that identifies what you hope to achieve, how you intend to make it happen, when you are going to do it, who will do it and makes sure it gets done, and how and when you will measure your results. A workplan specifies:

- the tasks that need to be completed to reach the objectives;
- the order for undertaking tasks;
- the time frame for completing the tasks with milestones for specific events or activities;
- the resources need to reach the objectives, including people, materials, facilities and funds; and
- the group members who are responsible for completing the individual tasks.

An evaluation logic model ( şeklin ) which is a diagram that can incorporate information like the activities, deliverables, results or outcomes, objectives and goals is a project management tool that makes people go beyond thinking about what will go into the group (financial and in-kind contributions) and what will be the immediate outputs (reports, pamphlets, etc.). The logic model illustrates the relationship between activities and the various results or changes. If these are not clearly defined, it will be very difficult to answer any of the evaluation questions; particularly “Did we do what we said we would do?” The format of the logic model may differ for each group so long as it makes sense to the people using it.
Use a Logic Model

A logic model is a plan for developing and evaluating a project, process or action. In the development phase, the movement is from left to right; in the evaluation phase, the movement is right to left. However, sometimes it is easier to start wherever you are in the process. For example, you may be focusing on activities and haven’t written out the goals and objectives. If you know your activities, you can move to the left and write the objectives and goals that drove those activities.

**Goals**
Goals are statements of what you are trying to accomplish. These are broad, general statements of what an organization is trying to do.

**Objectives**
Objectives are specific statements of what you want to do. Objectives contain an action verb; are directly related to the your goals; and have a specific date or time-frame for results to be achieved. Effective objectives are **SMART**: Specific, Measurable, Attainable, Realistic and Time-bound.

**Activities**
Activities or services are the actions you will undertake to accomplish each objective. Activities are actions that produce a good or service (output).
**Outputs (Deliverables, Products)**

Outputs are actual services, products or tools produced or improved delivered by the community collaboration process to an intended target audience (e.g. health information, research). These also include the one-time products that result from the process (e.g. tourism brochures). Outputs are directly controlled by the process.

**Outcomes**

Outcomes are the changes, improvements and benefits that occur as a result of the regional round table activities and outputs. They should be logically related to the objectives. The outcomes can be broken further down into:

- **Immediate Outcomes:** Areas where you have direct influence over the achievement of these outcomes.
- **Intermediate Outcomes:** These changes occur after the immediate outcomes.
- **Long-term Outcomes** Ultimate impact or effect of your efforts.

The changes are often in the following areas:

- knowledge (increasing knowledge on a particular issue or subject)
- attitudes (creating an attitude which favours a desired behaviour)
- skills (developing the individual capacity to adopt a given behaviour)
- behaviour (maintaining or adopting a healthy behaviour)

These areas where change may occur are not exclusive and often interact closely with one another. For example, a change in knowledge can lead to a change in behaviour. Although there is a continuum of change, understanding the specific changes your group is primarily focusing on will allow you to articulate what your group wants to achieve.

Once you know in which areas you are hoping to create change it is necessary to ensure that the desired changes are described in measurable terms. Specific and measurable outcomes should include five main elements:

- **expected change:** what is the specific change that is desired? (use an action verb)
- **target group:** who are you trying to reach?
- **location:** where is the change expected to take place?
- **timeline:** by what time will the change take place?
- **measure:** how will the change be measured? (number or percentage)

Some of the words help in writing project outcomes are

- increase/decrease in…
- strengthened…
- improved…
- expanded…
2. How will we know if we did what we said we would do?

Collaborative evaluation relies on the systemic and rigorous collection of information from staff, stakeholders and community members. The data collection is performed primarily at the RRT and community level. A data collection worksheet, (X) is required to make sure that the same type of information is collected on a regular basis.

A data collection worksheet outlines what, how and when the information will be collected throughout the process. This worksheet can be developed using many formats. The format and type usually includes the following sections:

- What would be the change or result we would see? (outcomes)
- How can we measure success? (indicators)
- Who has the information? (data source)
- How will the information be collected? (method of data collection)
- How often/when should the information be collected? (frequency)
- Who would be responsible for collecting the information? (responsibility)
- Who will collecting the information? (data collector)
- What financial, in-kind, human resources are needed? (resources)

Developing the Data Collection Worksheet

Now that the team has identified what the key expected changes or results (outcomes) are for the group, they must now identify what will constitute success and how it will be measured. Key questions that should be asked include:

- What will success look like, feel like, and sound like if the group reaches its objectives?
- How can we measure that success?

Indicators

Indicators are evidence, proof or information that helps measure progress towards reaching your goals and desired outcomes. Choosing the best indicators is not an exact science. What is important is making sure that the chosen indicators make sense to everyone involved. The discussion process can build commitment and excitement around doing the evaluation, and make sure that everyone is on the same page as we move forward.
Since the indicators are identified at the beginning of the process, it should always be remembered that indicators can be improved upon. As you begin to see what is happening on the ground, or other more effective ways to measure change, the indicators should also evolve if necessary. What is important is making sure you know what the situation was like before you began implementation (baseline) and what it looks like after.

The indicators that are chosen should be a combination of **quantitative** (have a numerical value) and **qualitative** measures (reflect perceptions, judgments or attitudes).

Many people are familiar with quantitative indicators, which report on the number of people in a training, percentage of training sessions addressing youth, number of skills addressed, etc. Key words used in expressing a quantitative indicator are:

- number of…
- percentage of…
- amount of…
- proportion of…

Another important aspect of measuring change is the quality of the change. What did the training mean to the people that participated? Was it regarded as being helpful? How will they use the skills they learned about? These types of qualitative measures can be more difficult to develop, but not impossible. Often the qualitative information is what tells the real story of what is happening on the ground. Key words used in expressing a qualitative indicator are:

- level of…
- evidence of…
- extent to which…
- presence of…
- quality of…

The final list of indicators should be a mix of quantitative and qualitative measures so that a more realistic picture of what has happened is described.

When developing indicators, thought should be given to:
- data availability and data collection: what is possible with the resources available;
- attribution: measuring results that can be reasonably attributed to the group’s activities;
- usefulness: potential use of evaluation findings while taking into account the importance of ensuring that the captured information is relevant; and
- Simplicity: two-three indicators per outcome (make sure the evaluation process isn’t guiding the group instead of the group guiding the evaluation).

The indicators must be manageable to accommodate the number of stakeholders whose information needs recording. Each stakeholder must ensure that all evaluation needs brought to the table are clear and concise. There should not be any indicators that do not address the evaluation requirements of at least one stakeholder.
3. How can we get the information we need?

Now that you have identified what you are trying to do and what information you need to measure success, the completion of the data collection worksheet requires the identification of how, when and by whom the information will be collected. To do so, there are key questions to ask:

- Who has the information? (data sources)
- How will the information be collected? (method of data collection)
- How often will the information be collected? (frequency)
- Who is responsible for collecting the information? (responsibility)
- Who will be collecting the information? (collector)
- What financial, in-kind, human resources are needed? (resources)

Who has the information?
Depending on the group, the data sources of the required information will vary considerably. Some information may be collected from people, and other information from documentation.

Some potential data sources are:

People:
- regional round table and advisory group stakeholders, staff and volunteers;
- target population;
- consumers of the group’s services;
- other service providers;
- general public; and
- governing council members.

Internal documentation:
- budget and financial information;
- activity forms;
- log books or project diaries;
- minutes of meetings;
- committee reports; and
- attendance lists.

**External documentation:**
- census data;
- community studies;
- consultant reports; and
- literature and other research in the field of study.

**How will the information be collected?**
The regional round table, advisory group, RDI and its University partners will have to decide the best way to collect information. This will be based on the group itself, comfort level with particular tools, resources available, cultural aspects, language, etc. The selection and design of the tools to be used will be done in collaboration with the people that will be using them. By doing this the tools make sense to everyone and stand the best chance of collecting the best information. It is important to make sure that the tools are user-friendly, not too burdensome, but still able to collect the necessary information.

**How often will the information be collected?**
Each group will have to decide how often they collect the various types of information. Some information will be collected on an ongoing basis; other information will be collected quarterly or annually, while some information may be collected only when deemed necessary. For example, attendance records and feedback sheets should be collected whenever a meeting is held, but other records may only be collected on an annual basis. Depending on the information that is being collected, appropriate timelines for data collection should be identified. This should be reflective of local realities (farming schedules, tourist season) to make sure the most accurate and relevant information is collected.

**Who is responsible for collecting the information? Who will be collecting the information?**
Collectively the regional round table and RDI are responsible for the data collection. It is important to identify who will be collecting the information to ensure everyone knows who is doing what, and to ensure important indicators are not omitted or forgotten in the data gathering stage. Academic institutions who have partnered with the regional round tables, advisory groups and RDI will serve a mutually agreed-up role for data collection and analysis.

**What financial, in-kind, human resources are needed?**
Data collection requires resources. In addition to identifying who is responsible and who will actually collect the information, you will need to determine what type and how much resources you will need to ensure an ongoing collaborative evaluation.
4. What does the information tell us?

By this point you have gathered all the information needed to answer your questions along with additional information that was gathered to meet the needs of proponents, partners, community members, and other stakeholders. Gathering all of the necessary information is usually not a problem, but now you need to make sense of the information.

The three main steps to analyzing the information are:
- compiling the information;
- analyzing the information; and
- drawing conclusions.

First, the information from the various sources needs to be compiled. This will give an initial feel as to how much information there is, what formats it is in, and how it can begin to be sorted.

Second, you begin to analyze the information. Refer back to the main evaluation questions (Did we do what we said we would do? What worked and what didn’t? What could be done differently? What difference is it making?). As the material is read, any patterns or themes that develop when answering evaluation questions are noted. Findings are recorded, trying to include exact quotations from interview sheets or questionnaires to capture what people have said or how they feel about the group’s activities. This will help provide the context to the analysis when it is complete. While themes and patterns are being documented, differences that have occurred are also noted. These differences are often important elements of lessons learned or what your group would do differently.

Once the material has been grouped into themes, and an analysis of the information based on the findings and expected changes performed, conclusions are drawn. This stage is probably the most important stage in interpreting the information and needs time to reflect on what the analysis reveals. Is what is written in the documents the same as what is done in reality? If there is a difference, and if so why?

The conclusions that are drawn should be justified with the information that has been gathered. The analysis and conclusions should be shared with key stakeholders to validate
what has been found. If people in the group are in agreement and can see themselves reflected in the findings, then validity is built into the process.

5. How can we use this information?

Using the results is the last step in the evaluation process. Results should be used as soon as they become available. Thinking about how you will use the results at the start of the process helps to ensure the evaluation itself and the reporting of findings are conducted in a way that meets the particular needs you have highlighted.

Some of the ways to use the findings include:
- presenting reports to regional round table and advisory members, and stakeholders;
- developing news releases with main learnings and conclusions;
- using results to shape future directions and decisions; and
- sending thank-you letters to all key stakeholders outlining key findings.

Summary
Ongoing collaborative evaluation brings all of the stakeholders together to provide opportunities to learn about what is working, what isn’t, and what needs to be altered in the process. As you travel along on your journey, you will adjust it based on what you have learned. You will also be able to send messages “back home” about the successes you are having and the wonderful partnerships you have made. You may even decide to embark on another journey, or continue beyond your original destination because you’ve been able to see more and do more as a result of your partnerships.
Tools and Resources
Building & Strengthening Partnerships

Pathway to Effective Partnerships

Start with a common picture of the future.

Define the desired outcomes.

Include those who are involved.

Agree to work together.

Plan the steps required to reach goals.

Decide who does what.

Decide how information is shared.

Determine what’s needed and what’s available.

Decide what success is.

Adjust and move on.
**Partnership Implementation Checklist**

*Complete the checklist as you implement the partnership.*

<table>
<thead>
<tr>
<th>Step</th>
<th>Completed</th>
</tr>
</thead>
<tbody>
<tr>
<td>Start with clearly defined vision, goals and objectives – the more narrowly focused, the better.</td>
<td></td>
</tr>
<tr>
<td>Evaluate the potential partner in terms of technical and organizational compatibility, personal chemistry and other relationships.</td>
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<tr>
<td>Use the negotiation process to foster understanding, commitment and a problem-solving attitude as a foundation for the partnership.</td>
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<tr>
<td>Set out a partnership implementation plan for the first 100 days.</td>
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<tr>
<td>Ensure the required resources and people are available.</td>
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<tr>
<td>Set up clear lines and procedures for vertical and horizontal communication.</td>
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<tr>
<td>Be clear about how and where the organizations link together.</td>
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<tr>
<td>Ensure the roles and responsibilities of different organizational levels are clearly understood.</td>
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<tr>
<td>Ensure all parties involved know their responsibilities and accountability.</td>
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<tr>
<td>Ensure and maintain top level of commitment.</td>
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<tr>
<td>Ensure that your agreement has clearly defined milestones and checkpoints, and agree on reviews and measures.</td>
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<tr>
<td>Think strategically but deliver short-term results to build trust, maintain enthusiasm, commitment, and momentum.</td>
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<tr>
<td>Encourage a learning environment to internalize necessary skills and avoid partner dependency.</td>
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<tr>
<td>Be realistic about how long it will take to see results.</td>
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<tr>
<td>Stay flexible. Recognize that circumstances change – your agreement may have to change, possibly more than once.</td>
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</tbody>
</table>
**Group Effectiveness Checklist**

*Use occasionally to check your group’s effectiveness. The higher the number of “Yes’s”, the more effective the group will tend to be.*

<table>
<thead>
<tr>
<th>Statement</th>
<th>Yes</th>
<th>No</th>
</tr>
</thead>
<tbody>
<tr>
<td>The atmosphere tends to be informal, comfortable and relaxed.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>There is a lot of discussion in which virtually everyone participates.</td>
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<td></td>
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<tr>
<td>The task or objective of the group is well understood and accepted.</td>
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<td></td>
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<tr>
<td>The members listen to each other.</td>
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<td></td>
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<tr>
<td>The members are comfortable with disagreement and do not avoid conflict.</td>
<td></td>
<td></td>
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<tr>
<td>Most decisions are reached by consensus.</td>
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<td></td>
</tr>
<tr>
<td>Feedback is frequent, frank and relatively comfortable.</td>
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<td></td>
</tr>
<tr>
<td>When action is taken, clear assignments are made and accepted.</td>
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<td></td>
</tr>
<tr>
<td>People are free to express their feelings and ideas.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>The chairperson does not dominate the group.</td>
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<td></td>
</tr>
<tr>
<td>The group is self-conscious about its own operations and stops occasionally to examine it.</td>
<td></td>
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</tr>
</tbody>
</table>
**Group Participant Self-Checklist**

*Complete the checklist, answering the following questions:*

**As a member of the group, I**

<table>
<thead>
<tr>
<th>Activity</th>
<th>✓</th>
</tr>
</thead>
<tbody>
<tr>
<td>Attend and participate in all meetings.</td>
<td></td>
</tr>
<tr>
<td>Contribute to the mission/purpose.</td>
<td></td>
</tr>
<tr>
<td>Help develop a vision.</td>
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</tr>
<tr>
<td>Help develop goals, objectives, and policies.</td>
<td></td>
</tr>
<tr>
<td>Help determine issues and help establish priorities.</td>
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</tr>
<tr>
<td>Facilitate the implementation of action plans.</td>
<td></td>
</tr>
<tr>
<td>Monitor and evaluate the RRT process.</td>
<td></td>
</tr>
<tr>
<td>Act in the best interest of the group.</td>
<td></td>
</tr>
<tr>
<td>Act as a spokesperson, as needed.</td>
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</tr>
<tr>
<td>Stay informed about the issues.</td>
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</tr>
<tr>
<td>Keep abreast of changing needs in the communities.</td>
<td></td>
</tr>
<tr>
<td>Participate in retreats, training, fundraising, and social activities.</td>
<td></td>
</tr>
<tr>
<td>Actively recruit new members.</td>
<td></td>
</tr>
</tbody>
</table>
Solutions Matrix

*Use when a group needs to come to consensus on a solution, decision or course of action.*

<table>
<thead>
<tr>
<th>Potential Solution</th>
<th>Resources Needed (financial, material &amp; human)</th>
<th>Benefit</th>
<th>Level of Difficulty to Implement</th>
<th>Potential Implementation Problems</th>
</tr>
</thead>
<tbody>
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</tbody>
</table>
Developing Goal & Objectives Worksheet

Goal: (a general statement describing what it is that you hope to accomplish).

Objectives: (contain an action verb; are directly related to the goal; and have a specific date or time frame for results to be achieved. Objectives are Specific, Measurable, Attainable, Realistic, and Time-bound).

<table>
<thead>
<tr>
<th>Objectives</th>
<th>Achieved by (date)</th>
</tr>
</thead>
<tbody>
<tr>
<td>1.</td>
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<td>2.</td>
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<td>3.</td>
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<td>4.</td>
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<td>5.</td>
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<td>6.</td>
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<tr>
<td>7.</td>
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<tr>
<td>8.</td>
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</tr>
</tbody>
</table>

Specific | Measurable | Attainable | Realistic | Time-bound
## Workplan Worksheet

**Goal:**

**Objective**

<table>
<thead>
<tr>
<th>Activity (what)</th>
<th>Task (how)</th>
<th>Responsibility (who)</th>
<th>Timeline (when)</th>
<th>Resources (with what)</th>
</tr>
</thead>
<tbody>
<tr>
<td>1.</td>
<td>1.</td>
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</tr>
</tbody>
</table>
## Action Planning Form

Group:___________________________  Group Leader:____________________________
Date:__________________________

<table>
<thead>
<tr>
<th>Action Item</th>
<th>Who is Responsible for the Action?</th>
<th>Action Steps</th>
<th>Start Date</th>
<th>Completion Date</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
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</tr>
</tbody>
</table>
## Conflict Resolution Worksheet

Think of a difficult situation that is occurring in your group that you want to resolve positively. Write down your observations and understanding of the situation.

<table>
<thead>
<tr>
<th>What is the problem? <em>(2 or 3 sentences)</em></th>
</tr>
</thead>
<tbody>
<tr>
<td>Who is involved? Who are the main parties?</td>
</tr>
<tr>
<td>What is (or has) actually happened?</td>
</tr>
<tr>
<td>What do you want to happen to resolve the conflict?</td>
</tr>
<tr>
<td>What can be done to resolve the conflict?</td>
</tr>
</tbody>
</table>
# Meeting Planner Form

<table>
<thead>
<tr>
<th><strong>Purpose</strong></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Why are you holding the meeting?</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th><strong>Objective</strong></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>What should be achieved by the end of the meeting?</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th><strong>Background Information</strong></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Information already known.</td>
<td></td>
</tr>
<tr>
<td>Information needed.</td>
<td></td>
</tr>
<tr>
<td>Limitations.</td>
<td></td>
</tr>
<tr>
<td>Deadlines.</td>
<td></td>
</tr>
<tr>
<td>Constraints.</td>
<td></td>
</tr>
<tr>
<td>Resources available.</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th><strong>Meeting Participants</strong></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Who would expect to be involved?</td>
<td></td>
</tr>
<tr>
<td>Who needs information?</td>
<td></td>
</tr>
<tr>
<td>Who can contribute?</td>
<td></td>
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<tr>
<td>Who would provide support?</td>
<td></td>
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<tr>
<td>Who might resist?</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th><strong>Agenda Planning</strong></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Topics/issues to cover.</td>
<td></td>
</tr>
<tr>
<td>Time allotted for each agenda item.</td>
<td></td>
</tr>
<tr>
<td>Time needed for meeting.</td>
<td></td>
</tr>
<tr>
<td>Start/end time.</td>
<td></td>
</tr>
<tr>
<td>Meeting location/date.</td>
<td></td>
</tr>
<tr>
<td>Assign note taking.</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th><strong>Participant Preparation</strong></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Information given to participants.</td>
<td></td>
</tr>
<tr>
<td>How should participants prepare before they come?</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th><strong>Follow-up</strong></th>
<th></th>
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</thead>
<tbody>
<tr>
<td>Is another meeting necessary?</td>
<td></td>
</tr>
<tr>
<td>Will a report be prepared?</td>
<td></td>
</tr>
<tr>
<td>Who should know about the actions decided in the meeting?</td>
<td></td>
</tr>
</tbody>
</table>
# Meeting Agenda Planning Form

<table>
<thead>
<tr>
<th>Group</th>
<th>Location</th>
<th>Participants</th>
</tr>
</thead>
<tbody>
<tr>
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</table>

<table>
<thead>
<tr>
<th>Start Time:</th>
<th>End Time:</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
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</table>

<table>
<thead>
<tr>
<th>Meeting Purpose</th>
<th>Meeting Objectives</th>
</tr>
</thead>
<tbody>
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</tbody>
</table>

<table>
<thead>
<tr>
<th>Topic</th>
<th>Actions</th>
<th>Participant responsible for Action Items</th>
</tr>
</thead>
<tbody>
<tr>
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</tbody>
</table>
# Detailed Meeting Agenda Planning Form

*Use when you are leading a complex meeting*

<table>
<thead>
<tr>
<th>Time</th>
<th>Action Item</th>
<th>Who</th>
<th>What/How</th>
<th>Anticipated Result</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Review action items.</td>
<td>Chairperson</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Review agenda items.</td>
<td></td>
<td></td>
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<tr>
<td></td>
<td>Reports:</td>
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<tr>
<td></td>
<td>• Officers</td>
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<td></td>
<td>• Standing committees</td>
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<td></td>
<td>• Special committees</td>
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<tr>
<td></td>
<td>Discuss next steps &amp; assignments.</td>
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<tr>
<td></td>
<td>Confirm assignments &amp; completion dates.</td>
<td></td>
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<tr>
<td>Adjourn meeting.</td>
<td></td>
<td>Chairperson</td>
<td></td>
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<tr>
<td></td>
<td>Close meeting.</td>
<td></td>
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</tbody>
</table>
Minutes Form

Minutes of __________________________ Organization __________________________

Date: __________________________

Location: _______________________

The meeting was called to order by Chairperson: ______________________________

Minutes of the __________ meeting were read, (corrected), and accepted.

Officer’s Reports

Standing Committee Reports

Special Committee Reports

Old/Unfinished Business

New Business

Future Agenda

Date, time, location next meeting

Adjournment time
### Meeting Participation Self-Checklist Checklist

*Use periodically as a self-check to see how effectively you participate in meetings.*

<table>
<thead>
<tr>
<th>Behaviour</th>
<th>Never</th>
<th>Occasionally</th>
<th>Often</th>
</tr>
</thead>
<tbody>
<tr>
<td>I suggested a procedure for the group to follow, or a method for organizing the task.</td>
<td></td>
<td></td>
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<tr>
<td>I suggested a new idea, new activity, new problem or a new course of action.</td>
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</tr>
<tr>
<td>I attempted to bring the group back to work when joking, personal stories, or irrelevant talk goes on too long.</td>
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<tr>
<td>I suggested, when there was some confusion that the group makes an outline or otherwise organize a plan for completing the task.</td>
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<tr>
<td>I initiated attempts to redefine goals, problems, or outcomes when things became hazy or confusing.</td>
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<tr>
<td>I elaborated on ideas with concise examples or illustrations.</td>
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<tr>
<td>I suggested resource people to contact and/or brought materials.</td>
<td></td>
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</tr>
<tr>
<td>I presented the reasons behind my opinions.</td>
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</tr>
<tr>
<td>I asked others for information and/or opinions.</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>I asked for significance and/or implications of facts and opinions.</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>I saw and pointed out relationships between facts and opinions.</td>
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<td></td>
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<tr>
<td>I asked a speaker to explain the reasoning that led him or her to a particular conclusion.</td>
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</tr>
<tr>
<td>I related my comments to previous contributions</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>I pulled together and summarized various ideas presented</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>I tested to see if everyone agreed with, or understood the issue discussed, or the decision made.</td>
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</tr>
<tr>
<td>I summarized the progress the group had made.</td>
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<tr>
<td>I encouraged other members to participate and tried to unobtrusively involve quiet members.</td>
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<tr>
<td>I actively supported others when I thought their point of view was important.</td>
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<tr>
<td>I tried to find areas of agreement in conflicting points of view and tried to address the source of the problem.</td>
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<tr>
<td>I used appropriate humour to reduce tension in the group</td>
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<tr>
<td>I listened attentively to others’ ideas and contributions.</td>
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</tbody>
</table>
# Collaborative Evaluation

## Evaluation Planning Worksheet

<table>
<thead>
<tr>
<th>Question</th>
<th>Response</th>
</tr>
</thead>
<tbody>
<tr>
<td>Who is your organization?</td>
<td></td>
</tr>
<tr>
<td>Why are you conducting an evaluation?</td>
<td></td>
</tr>
<tr>
<td>What are the goals and objectives?</td>
<td></td>
</tr>
<tr>
<td>What are you going to evaluate?</td>
<td></td>
</tr>
<tr>
<td>Who will use the evaluation?</td>
<td></td>
</tr>
<tr>
<td>How will they use the information?</td>
<td></td>
</tr>
<tr>
<td>When is the evaluation needed?</td>
<td></td>
</tr>
<tr>
<td>What resources do you need? Time, Money, People – professional, volunteers, participants</td>
<td></td>
</tr>
<tr>
<td>Who will conduct the evaluation?</td>
<td></td>
</tr>
<tr>
<td>What existing information do you have?</td>
<td></td>
</tr>
<tr>
<td>What new information do you need to gather?</td>
<td></td>
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<tr>
<td>------------------------------------------</td>
<td></td>
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</tbody>
</table>

<table>
<thead>
<tr>
<th>What data collection method(s) will you use?</th>
</tr>
</thead>
<tbody>
<tr>
<td>☐ Questionnaire/survey</td>
</tr>
<tr>
<td>☐ Interview</td>
</tr>
<tr>
<td>☐ Observation</td>
</tr>
<tr>
<td>☐ Focus groups</td>
</tr>
<tr>
<td>☐ Other (list)</td>
</tr>
<tr>
<td>☐ Document review</td>
</tr>
<tr>
<td>☐ Testimonials</td>
</tr>
<tr>
<td>☐ Log/journal/diary</td>
</tr>
<tr>
<td>☐ Photos/videos</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>What data collection tools do you have?</th>
</tr>
</thead>
<tbody>
<tr>
<td>-----------------------------------------</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>What data collection tools do you need to develop?</th>
</tr>
</thead>
<tbody>
<tr>
<td>---------------------------------------------------</td>
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</tbody>
</table>

<table>
<thead>
<tr>
<th>Who will collect the data?</th>
</tr>
</thead>
<tbody>
<tr>
<td>-----------------------------</td>
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</tbody>
</table>

<table>
<thead>
<tr>
<th>Who will compile the information?</th>
</tr>
</thead>
<tbody>
<tr>
<td>-----------------------------------</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>How will the information be compiled?</th>
</tr>
</thead>
<tbody>
<tr>
<td>---------------------------------------</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Who will analyze the information?</th>
</tr>
</thead>
<tbody>
<tr>
<td>------------------------------------</td>
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</tbody>
</table>

<table>
<thead>
<tr>
<th>How will the information be analyzed?</th>
</tr>
</thead>
<tbody>
<tr>
<td>---------------------------------------</td>
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</tbody>
</table>

<table>
<thead>
<tr>
<th>How will evaluation be communicated and shared?</th>
</tr>
</thead>
<tbody>
<tr>
<td>To whom</td>
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<tr>
<td>When/where/how to present</td>
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</table>

<table>
<thead>
<tr>
<th>How will evaluation be communicated and shared?</th>
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<table>
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<tr>
<th>What actions will you take as a result of the evaluation?</th>
</tr>
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</table>
### Logic Model

#### From Strategic Plan

<table>
<thead>
<tr>
<th>Vision</th>
<th>Goals &amp; Objectives</th>
<th>Activities</th>
<th>Outputs</th>
<th>Outcomes</th>
<th>Indicators</th>
<th>Methods/Measures</th>
</tr>
</thead>
<tbody>
<tr>
<td>What you are trying to accomplish</td>
<td>What you want to do</td>
<td>A ctions</td>
<td>Products, services, deliverables</td>
<td>Change, improvement, benefit</td>
<td>Evidence/proof of attainment of Outcomes</td>
<td>Data measures &amp; collection methods</td>
</tr>
</tbody>
</table>

**Logic Model**

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Logic Model Example- Hudson Bay Neighbours Regional Round Table

**Goals/Objectives**
- To establish a viable round table to promote communities in Northern Manitoba and the Kivalliq region of Nunavut in order to coordinate and advance issues of mutual concern.

**Activities**
- Introduce and modify Junior Achievement to Nunavut youth
- Train Economic Development Officers (EDOs)

**Outputs**
- A Junior Achievement conference/seminar in Nunavut (September 2003)
- Have EDO’s engaged with youth.

**Outcomes**
- Provide youth with better understanding of business operations, life skills ability to recognize and take advantage of opportunities.
- Number of EDO’s involved in the Junior Achievement program

**Vision/Mission**

**Evidence, proof or information progress & showing attainment of improvement or benefits**
- Number of youth involved in the Junior Achievement program
## Logic Model Worksheet

<table>
<thead>
<tr>
<th>Vision/Mission</th>
<th>Goal &amp; Objectives</th>
<th>Activities</th>
<th>Outputs/ Deliverables</th>
<th>Expected Outcomes</th>
<th>Indicators</th>
<th>Methods/measures</th>
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</table>
### Logic Model Worksheet Example

**Vision/Mission**  
To work cohesively together around areas of common concern and to have a stronger voice as a group.

<table>
<thead>
<tr>
<th>Goals &amp; Objectives</th>
<th>Activities</th>
<th>Outputs/Deliverables</th>
<th>Expected Outcomes</th>
<th>Indicators</th>
<th>Methods/Measures</th>
</tr>
</thead>
</table>
| Provide opportunity for communities to understand their current assets and conditions | • Hold regular community meetings  
• Educate community about their profiles  
• Review existing profiles  
• Assign the appropriate components to person/agency for regular maintenance  
• Gather outstanding information | • Revised community profiles  
• Community meetings  
• New information (if necessary) | • Increased knowledge and awareness of their community’s assets and conditions. | • Number of community meetings held  
• Community residents are more knowledgeable of assets  
• Person/agency identified to maintain community profiles  
• New information is gathered | • Count meetings and members’ attendance  
• Interview community members  
• Review meeting notes/minutes for evidence that person/agency has been discussed & identified  
• Existence of new information |
| Provide opportunity to bring everyone together on a regular basis to discuss regional issues. | • Hold regular meetings.  
• Meeting notes, minutes, and reports | • Create a stronger group. | • Number of meeting held  
• Attendance at meetings.  
• Effectiveness of meeting | • Count number of meetings  
• Count number of attendees at each meeting  
• Existence of meeting notes, minutes, and reports.  
• Interview stakeholders |
<table>
<thead>
<tr>
<th><strong>Goals &amp; Objectives</strong></th>
<th><strong>Activities</strong></th>
<th><strong>Outputs/Deliverables</strong></th>
<th><strong>Expected Outcomes</strong></th>
<th><strong>Indicators</strong></th>
<th><strong>Methods/Measures</strong></th>
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</thead>
<tbody>
<tr>
<td>Create strong partnerships with government stakeholders</td>
<td>- Identify key government stakeholders</td>
<td>- New partnerships established</td>
<td>- Stronger relationships with government stakeholders</td>
<td>- Number of new partnerships established</td>
<td>- Count new partnerships</td>
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<td></td>
<td>- Invite government stakeholders to meetings</td>
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<td>- Number of government stakeholders attending meetings</td>
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<td>- Effectiveness of new partnerships</td>
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</tbody>
</table>

*May be reproduced*
# Data Collection Worksheet

<table>
<thead>
<tr>
<th>What would be the change or result we would see? (Outcomes)</th>
<th>How can we measure success? (Indicators)</th>
<th>Who has the information? (Data source)</th>
<th>How will the information be collected? (Data collection method)</th>
<th>How often/when should the information be collected? (Frequency)</th>
<th>Who is responsible for collecting the information? (Responsibility)</th>
<th>Who will be collecting the information? (Data collector)</th>
<th>What $, material &amp; human resources are needed? (Resources)</th>
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</tbody>
</table>
## Data Collection Worksheet Example

<table>
<thead>
<tr>
<th>What would be the change or result we would see? (Outcomes)</th>
<th>How can we measure success? (Indicators)</th>
<th>Who has the information? (Data source)</th>
<th>How will the information be collected? (Data collection method)</th>
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<th>Who is responsible for collecting the information? (Responsibility)</th>
<th>Who will be collecting the information? (Data collector)</th>
<th>What $, material &amp; human resources are needed? (Resources)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Increased knowledge and awareness of community assets</td>
<td>Number of community meetings</td>
<td>RRT</td>
<td>Review of meeting notes, minutes, and reports</td>
<td>After each meeting (4 times/year)</td>
<td>RRT Academic partner RDI</td>
<td>Academic partner</td>
<td>Time – stakeholders, researchers, staff</td>
</tr>
<tr>
<td></td>
<td>Community members are more knowledgeable of community assets</td>
<td>Community residents</td>
<td>Focus groups interviews</td>
<td>Once a year</td>
<td>RRT Academic partner RDI</td>
<td>Academic partner</td>
<td>Time – stakeholders, researchers, staff</td>
</tr>
<tr>
<td></td>
<td>New and outstanding information is gathered for community profiles</td>
<td>Municipal organizations, service providers, etc.</td>
<td>Depends on information required</td>
<td>Once a year</td>
<td>RRT Academic partner RDI</td>
<td>Academic partner</td>
<td>Time – stakeholders, researchers, staff</td>
</tr>
<tr>
<td></td>
<td>Create a stronger Regional Round Table</td>
<td>RRT AG</td>
<td>Count number of meetings Existence of meeting notes, minutes, reports</td>
<td>After each meeting</td>
<td>RRT Academic partner RDI</td>
<td>Academic partner</td>
<td>Time – stakeholders, researchers, staff</td>
</tr>
<tr>
<td></td>
<td>Attendance at meetings</td>
<td>RRT AG</td>
<td>Count attendance Existence of meeting notes, minutes, reports</td>
<td>After each meeting</td>
<td>RRT Academic partner RDI</td>
<td>Academic partner</td>
<td>Time – stakeholders, researchers, staff</td>
</tr>
<tr>
<td></td>
<td>Effectiveness of meeting</td>
<td>RRT AG</td>
<td>Meeting evaluation forms</td>
<td>After each meeting</td>
<td>RRT Academic partner RDI</td>
<td>Academic partner</td>
<td>Time – stakeholders, researchers, staff</td>
</tr>
<tr>
<td>What would be the change or result we would see? (Outcomes)</td>
<td>How can we measure success? (Indicators)</td>
<td>Who has the information? (Data source)</td>
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</tr>
<tr>
<td>Stronger relationships with government stakeholders</td>
<td>Number of new partnerships established</td>
<td>RRT AG</td>
<td>Count number of new partnerships</td>
<td>Once a year</td>
<td>RRT Academic partner RDI</td>
<td>Academic partner</td>
<td>Time – stakeholders, researchers, staff</td>
</tr>
<tr>
<td></td>
<td>Number of government stakeholders attending meetings</td>
<td>RRT AG</td>
<td>Count attendance Existence of meeting notes, minutes, reports</td>
<td>After each meeting</td>
<td>RRT Academic partner RDI</td>
<td>Academic partner</td>
<td>Time – stakeholders, researchers, staff</td>
</tr>
<tr>
<td></td>
<td>Effectiveness of partnership</td>
<td>RRT AG Other stakeholders</td>
<td>Focus groups, interviews, brief survey</td>
<td>Once a year</td>
<td>RRT Academic partner RDI</td>
<td>Academic partner</td>
<td>Time – stakeholders, researchers, staff</td>
</tr>
</tbody>
</table>
Regional Round Table Process Questions

Please reflect upon and answer the questions that you have information for. If you are able to, please consult other members of your RRT. These questions are designed to enable your RRT to examine its organizational structure and processes. Depending where you are in the RRT formation process, you may not have the answers to all of the questions just yet.

<table>
<thead>
<tr>
<th>RRT Question</th>
<th>Your Answer</th>
<th>How would you know? (Where is the information?)</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Vision &amp; Goals</strong></td>
<td></td>
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</tr>
<tr>
<td>1. Why does the RRT exist?</td>
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<tr>
<td>2. What does the RRT intend to accomplish?</td>
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<tr>
<td>3. What do you envision changing because of the RRT?</td>
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<tr>
<td><strong>Membership</strong></td>
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<tr>
<td>4. What communities are the members of your RRT? (List them.)</td>
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<tr>
<td>5. Who are the individual representatives for each community? (List them.)</td>
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<td>6. What is each representative’s position within his/her community? (e.g. mayor, councilor, etc.)</td>
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<tr>
<td><strong>Operating Structure &amp; Processes</strong></td>
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<tr>
<td>7. Does your RRT have a Chairperson? If so who is he/she? What are the duties/responsibilities?</td>
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<tr>
<td>8. How does your RRT select the Chairperson?</td>
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<tr>
<td>9. Does your RRT have a meeting Recorder? If so who is he/she? What are the duties/responsibilities?</td>
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</tr>
<tr>
<td>RRT Question</td>
<td>Your Answer</td>
<td>How would you know? (Where is the information?)</td>
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<tr>
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<tr>
<td>10. Does your RRT have a financial person? If so who is he/she? What are the duties/responsibilities?</td>
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<td>11. Who funds the RRT?</td>
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<td>12. How does the RRT keep track of financial transactions?</td>
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<td>13. What other resources does your RRT have?</td>
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<tr>
<td>14. What other resources does your RRT need?</td>
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<tr>
<td>15. How do the member communities select their community representatives?</td>
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<tr>
<td>16. How do other communities join your RRT?</td>
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<tr>
<td>17. How are new ideas brought to the RRT?</td>
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<td>18. How does the RRT make decisions?</td>
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<td>19. How does the RRT get things done?</td>
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<td>20. If there are disagreements amongst the members, how does the RRT resolve them?</td>
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<tr>
<td>RRT Question</td>
<td>Your Answer</td>
<td>How would you know?</td>
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<tr>
<td><strong>Communication</strong></td>
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<td>(Where is the information?)</td>
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<tr>
<td>21. How does the RRT communicate?</td>
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<td>• Within the RRT?</td>
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<td>• To member communities?</td>
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<td>• To the general public?</td>
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<td>• To governments?</td>
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<tr>
<td><strong>Results/Impacts</strong></td>
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<td>22. What has the RRT accomplished?</td>
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<tr>
<td>• What worked?</td>
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<td>• What didn’t work?</td>
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<tr>
<td>• What changed because of the RRT?</td>
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<td>• What difference did the RRT make?</td>
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<tr>
<td>• What would the RRT do differently next time?</td>
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<tr>
<td><strong>Other</strong></td>
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<tr>
<td>23. Other questions/answers that you might have.</td>
<td></td>
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</tbody>
</table>
**Advisory Group Process Questions**

Please reflect upon and answer the questions that you have information for. If you are able to, please consult other members of your Advisory Group (AG) These questions are designed to enable your AG to examine its organizational structure and processes. Depending where you are in the AG formation process, you may not have the answers to all of the questions just yet.

<table>
<thead>
<tr>
<th>AG Question</th>
<th>Your Answer</th>
<th>How would you know? (Where is the information?)</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Vision &amp; Goals</strong></td>
<td></td>
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</tr>
<tr>
<td>1. What RRT does your AG connect with? Provide examples of what your AG has done in connecting with the RRT.</td>
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<tr>
<td>2. What do you envision changing because of the AG?</td>
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<tr>
<td><strong>Membership</strong></td>
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<tr>
<td>3. What are you members? (List them.) Which governments/agencies do they represent?</td>
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<tr>
<td><strong>Operating Structure &amp; Processes</strong></td>
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<tr>
<td>4. Does your AG have a Chairperson? If so who is he/she? What are the duties/responsibilities?</td>
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<tr>
<td>5. How does your RRT select the Chairperson?</td>
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<tr>
<td>6. Does your AG have a meeting Recorder? If so who is he/she? What are the duties/responsibilities?</td>
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<tr>
<td>7. How do other governments/agencies join your AG?</td>
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<td>8. How are new ideas brought to the AG?</td>
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<td>9. How does the AG make decisions?</td>
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<tr>
<td>AG Question</td>
<td>Your Answer</td>
<td>How would you know?</td>
</tr>
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<td>10. How does the AG connect with the RRT?</td>
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<td>(Where is the information?)</td>
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<td>11. If there are disagreements amongst the members, how does the AG resolve them?</td>
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<tr>
<td><strong>Operating Structure &amp; Processes</strong></td>
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<td>12. How does the AG communicate?</td>
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<td><strong>Results/Impacts</strong></td>
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<td>13. What has the AG accomplished?</td>
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<td>14. Other questions/answers that you might have.</td>
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Guidelines for Engaging Evaluators

Find the Right Evaluator
You will receive good work from Evaluators if you choose them carefully.

- Ask around. Word of mouth is a good way to obtain information about who has done good work in the past.
- Engage a known Evaluator who has done similar work in the past.
- Ask an Evaluator you trust to suggest someone.

Choose the Right Evaluator
When you have a list of people who might be interested in providing services to you, your next job is to choose the right person (or persons) to do the work. A good way to choose the most suitable Evaluator is through a selection committee. The committee’s job is to choose and recommend the Evaluator who is most likely to do the best job at a reasonable cost.

The selection committee:
- contacts the Evaluators and sends them the project description and the terms of reference. The terms of reference outline your understanding of the job to be done, specify your Evaluation objectives, state the “product” you expect the Evaluator to produce and set a schedule for carrying out the Evaluation.
- invites Evaluators to send proposals. The proposal should outline how the Evaluator would meet your objectives, carry out the Evaluation and the cost to complete it.
- assesses the proposals. In assessing the proposals, the committee looks at how the Evaluator will meet your needs, the Evaluator’s qualifications and the estimated cost.
- chooses a “short list” of up to four of the best people or firms from those who sent in proposals.
- interviews those on the short list, focusing on the Evaluator’s expertise, knowledge of the project and the proposed fee.
- checks the Evaluator’s references. The best references come from people and organizations for whom the Evaluator has worked. When checking the references, the committee should ask the following questions:
  - Were the contract terms honoured?
  - Was the work finished on time?
  - Was the work done within budget?
  - Were the recommendations or reports useful?
  - Was the Evaluator open and flexible to ideas and input from the client?
  - How well did the Evaluator work with the client?
- chooses the Evaluator. As a courtesy to other Evaluators who send in proposals, you should notify them that you have chosen someone else for the job.
Engage the Evaluator
An accepted proposal leads to a contract. A written contract provides the framework within which obligations, rights and remunerations are clarified. It clearly states who is responsible for what and helps prevent unpleasant surprises for both you and the Evaluator. When you and the Evaluator sign a contract, you’re both part of a legal agreement. A contract serves your needs as well as the Evaluator’s. You expect the Evaluator to do a good job, produce acceptable results and complete the work on time. The Evaluator expects to be paid promptly for the work he or she does.

The contract should cover:
- the names and responsibilities of both parties.
- fees and payment schedules.
- costs.
- deadlines.
- what the Evaluator is expected to deliver or produce.
- who owns what the Evaluator produces.
- to whom the Evaluator’s report or other material may be released.

Work with the Evaluator
Provide a person as a point of contact for the Evaluator to:
- secure all internal documents to be provided to the Evaluator;
- assist with project communications to staff and other stakeholders;
- provide sounding board to Evaluator;
- monitor project progress and contract details; and
- sign off at project completion.

Evaluate the Results
When the Evaluator has finished the work for you, it’s very useful to review the whole experience. Look at both the accomplishments and the problems. Did you get your money’s worth? Questions to ask:

- Did the Evaluator fully honour the contract?
- Did the Evaluator come up with reasonable findings, conclusions and recommendations?
- Was the report clear and helpful?
- Did the Evaluation go smoothly without misunderstandings?
- Were expectations realistic?
- Did you and the Evaluator work well together?
- Did you allow enough money in the contract to complete the Evaluation?
- Would you hire this Evaluator again?
- Would you recommend this Evaluator to someone else?
Purpose of the Agreement

The Models for Rural Development and Community Capacity Building Program (The Models Program) is a research initiative designed to contribute to the understanding of what approaches (models) to community development and capacity building work in rural, remote and northern communities. The information developed will be used to inform all levels of government to support their decisions on programs and services for rural Canadians, as well as future policy directions. In addition to helping governments with their decision-making, the information developed will benefit the individuals, organizations and communities involved with the models and other projects aimed at community development and capacity building.

The purpose of this document is to make clear agreed upon expectations between ORGANIZATION NAME and the Rural Development Institute in order to test a particular model, called the Community Collaboration Project, in PROVINCE.

The Community Collaboration Project (CCP) is an innovative approach to community economic development and capacity building in rural areas. The vision of CCP is to encourage communities to explore and develop processes to increase their ability to address change and work toward becoming more sustainable. Community representatives come together to participate in Regional Round Tables (RRTs) and work with an advisory group to identify regional socio-economic challenges, find common solutions, and implement programs and projects that address regional needs.

In light of discussions with the ORGANIZATION NAME, the Rural Development Institute is moving toward formalizing a project relationship. The Rural Development Institute (RDI) has set out the mutual expectations for the partners in the Community Collaboration Project in this document. RDI has a contract with the Rural Secretariat that extends until March 31st, 2008. However if either RDI or the ORGANIZATION NAME feel the Agreement is not working as intended and hoped for, there is a provision to terminate the project prior to this day. Please see Schedule A.
The **Rural Development Institute** of Brandon University is the project proponent and will manage and administer the Community Collaboration Project.

The ORGANIZATION NAME is the organization selected as a community site in PROVINCE to form a Regional Round Table.

The **Rural Secretariat, Agriculture and Agri-Food Canada** is financially supporting the Community Collaboration Project. References to “the Minister” in the document refers to the Minister of Agriculture and Agri-Food or any person authorized to act on his or her behalf.

**What is the role of the Rural Development Institute?**

The Rural Development Institute of Brandon University is the project proponent and will manage and administer the Community Collaboration Project (CCP). RDI has funding from the Rural Secretariat, Agriculture and Agri-Food Canada under The Models Program. RDI is funded to undertake research to test the applicability and replicability of the Community Collaboration Project processes and to support the development of the Regional Round Tables (RRTs).

The role of the Rural Development Institute will be:

1. To report to the Rural Secretariat in Winnipeg and Ottawa.
2. To liaise with both the Provincial Community Collaboration Project Advisory Group (subcommittees of the Provincial Rural Teams) and the Regional Round Tables.
3. To attend any RRT meetings deemed critical to the Community Collaboration Project processes.
4. To assist, when requested, in strengthening the collaboration process at the RRT and to help ensure successful outcomes.
5. To convene an annual meeting of reps of all RRTs and Rural Team Advisory Group in order to share experiences and learn from one another.
6. To document the CCP process so there is a strong record of the intention and impact of the RRT processes and to communicate lessons learned pertaining to the development of the RRT, evaluation and policy.
7. To hold in confidence any information provided to us by any of the stakeholders which is deemed NOT in the public domain. At a minimum, RDI will report the activities of each of the RRTs and Rural Teams in order that there is a public record of the community development processes employed and projects undertaken.

The Rural Development Institute will commit to strengthening and supporting RRTs selected for the Community Collaboration Project in 2005 and beyond in four specific ways.
a. RDI will bring information and resources to the RRT. It will also facilitate the early formation and structure of the RRT. When requested, RDI will facilitate dialogues at either a cross community or government representatives.
b. RDI will attend, when appropriate, RRT meetings to facilitate, document, and share information and lessons learned across rural provincial teams and all RRTs engaged in the project.
c. RDI will make a cash contribution to support the Regional Round Table. The exact amount of the contribution will depend on the Regional Round Table’s ability to leverage cash and/or in-kind contributions and will be based upon need and value. RDI will provide an amount of up to $100 000. This amount may also be subject to revision by the Minister should annual appropriations be changed by Parliament. See Schedule A.
d. RDI will facilitate a participatory evaluation process.

What is the role of the ORGANIZATION NAME?
To implement the Community Collaboration Project process, the roles and responsibilities of the ORGANIZATION NAME will be to:

1. Form a group of diverse, multi-stake holder members of the community who have the desire and commitment to work together to achieve common goals in order to form a Regional Round Table Advisory Group.
2. Work with the Rural Development Institute to measure indicators required for project evaluation and for reporting, on a minimum annual basis.
3. Share lessons learned about activities of the Regional Round Table and the PROVINCE Rural Team Advisory Group that will be made available to the public.
4. Agree to provide resources (in-kind and/or cash) to support the creation and operation of the Regional Round Table.
5. The Rural Development Institute will require from the ORGANIZATION NAME, on a quarterly basis, a financial accounting of the expenditures and reporting of any funds provided to them by the Rural Development Institute and also of funds that are leveraged from other sources that support the goals and purposes of this project. See Schedules A and B attached.

Duration of this Agreement: January 12, 2005 to March 31, 2008.

_____________________________________ Chair, ORGANIZATION'S NAME

_____________________________________ Witness ________________________ Date

_____________________________________ Director of the Rural Development Institute

_____________________________________ Witness ________________________ Date
SCHEDULE A
The Rural Development Institute and ORGANIZATION

1. The Rural Development Institute anticipates that the Community Collaboration Project will extend until March 31st, 2008 but could be terminated sooner by mutual agreement.

2. It is a requirement of Treasury Board Policy on Transfer payments that recipients of government funding declare any amounts owing to the federal government. (See Form 1) The ORGANIZATION'S NAME shall recognize that any amounts owed to the Crown may be offset against any expenses claimed under this Agreement.

3. The basis of payment for the flow of dollars and resources from Rural Development Institute to the ORGANIZATION'S NAME will be on an as required basis and on a submitted claim.

4. There will be a requirement from the ORGANIZATION'S NAME to repay overpayments, unexpended balances and disallowed costs. Until repaid, the overpayments will constitute a debt to the Crown.

5. Should the ORGANIZATION'S NAME fail to perform or comply with any terms, conditions or other obligations contained in this Agreement, for which it has responsibility, RDI may declare this agreement in default. If the Minister declares that an event of default has occurred, the Minister may, in addition to any remedy provided by law, exercise any of the following remedies; suspend the payment of any amount in respect of the contribution; or the ORGANIZATION'S NAME will be required to repay all or part of the contribution made with interest from the date of demand for repayment.

6. Indemnification of the Minister and Brandon University. The ORGANIZATION'S NAME shall indemnify and save harmless and the university, his or her officers, servants and agents as well as Brandon University and its agents from and against all liability, claims, demands, losses, damages, actions including reasonable legal fees and disbursements and any other proceedings, whatsoever and by whomever made for injury, death, environmental impact or property damage arising out of the agreed upon activities and objectives.

7. The ORGANIZATION'S NAME shall allow representatives of the Minister to have access to any records, information, databases, audit reports and other documentation for the purpose of audit and evaluation of the activities described in this Agreement, and for the verification of invoices with respect to payments made between RDI and the ORGANIZATION'S NAME. The ORGANIZATION'S NAME shall keep all records, information, databases, audit reports and all other documentation related to activities and associated expenses and costs for a period of six years from the date that the final activity under this Agreement is completed.

8. Any interpretation of this understanding must in turn be subject to the terms and conditions of the agreement between the Rural Development Institute and the Rural Secretariat.

9. Redress provision: Should there be a dispute between RDI and the ORGANIZATION'S NAME regarding the terms and conditions of this agreement, there will be two members selected by the ORGANIZATION'S NAME that will meet with the Director of the Rural Development Institute, the Brandon University Special projects officer, and two members of the Rural Secretariat. This group would ideally agree by consensus to a resolution of any disputes. If consensus can not be reached, the Rural Secretariat would have the ultimate decision making authority.
Sample 2 – Saskatchewan Population Health & Evaluation Research Unit (SPHERU), Universities of Regina & Saskatchewan

Memorandum of Agreement for the [project title here]

Introduction

The ________________ (title of project) is a joint research project between ________________ (specific names of communities and research team here). The project is directed by a steering committee that includes representatives of each of the partner organizations.

Details of Partner Organizations and Their Representatives

[in this section we listed the specific names of research team members and the organizations they represent- this included both community and academic team members]

Project Goal

[specific details about the actual project are described here]

Benefits to Community

The steering committee of this project recognizes the need to develop a coordinated, capacity building and pro-active approach. Therefore, in addition to achieving the project goal outlined above, a number of short-term and long-term objectives have been identified.

The short-term objectives include capacity building among team members, including community research assistants. There will be an exchange of organizational experience and expertise among the steering committee members and with the broader research team. Community research assistants and the project coordinator will be trained in research methods.

The long-term objectives include the provision and coordination of ________ education and awareness programming to the participant communities and other communities across northern Saskatchewan. In addition, the materials used to train the community assistants in research ethics and methodology will be compiled as a package distributed to community partners for future use.

Funding
This project is funded by the Canadian Institutes of Health Research (CIHR), through the Institute for Aboriginal Peoples’ Health (IAPH) and through the HIV/AIDS Research Program, a component of the Canadian Strategy on HIV/AIDS. The funds are located at the University of Regina. As principal investigator, ____________ (university PI here) is responsible to the CIHR and the University of Regina for the appropriate disposition of the funds and the ethical conduct of the project (as required by the University of Regina and Tri-council code of ethics).

**Purpose of this Memorandum of Agreement (MOA)**

The purpose of this MOA is to ensure the success of both the project and the partnership by laying out how the partnership will work to ensure confidentiality and effective communication and respect the values of involved communities. This is a living document, with the flexibility to respond to an evolving research partnership.

This MOA sets out the ways in which we will work together in such areas as:

- recognizing shared principles, objectives and responsibilities;
- selecting media spokespeople;
- making decisions;
- protecting information throughout the project as well as after it is completed; and
- communicating results in meaningful and useful capacities for all partners

**Principles**

The underlying principles in our work together will be mutual respect, recognition of each other’s constituencies and interests, responsibility in carrying out commitments, sharing information, and capacity building in the exchange of organizational experience and expertise. The steering committee group is the conscience of the project.

**Responsibilities of Member Agencies and Local Governments**

**General**

Representatives of participating communities, health care agencies, and research units, in guiding the research project, will ensure the validity of the research instrument and results. The local government representatives on the steering committee are integral members of the research team, working in partnership with academic and health services team members.

**Turnover in Steering Committee Membership or Organizational Leadership**

Each committee member is committed to ensuring ongoing representation from each of the partnership organizations. Steering committee members will assist in transitions in representation when necessary, ensuring continuity by selecting new members with interest and commitment in the issues being investigated.

**Agreement to Co-operate**
The steering committee will consider ongoing issues of ethics and appropriateness from inception to the dissemination process. The steering committee will determine the principles and processes that will guide the research project.

The steering committee will guide the design and implementation of the research instruments (e.g. focus groups and interview schedules and methods).

The steering committee will ensure support, training and development of skills for participating community members, including workers on the research team.

The steering committee will provide feedback on preliminary results of analysis, which will be sent to steering committee members as a project progress report.

The steering committee will provide discussion and feedback on the results of findings from the interviews and focus groups, which will be presented at a meeting of the steering committee.

The steering committee members will be open to communication through conference calls and correspondence throughout the project.

The steering committee will keep the participating communities and agencies informed of the progress of the project.

**Operational Policies**

1. Decision Making/Conflict Resolution
   - Decisions will be based on consensus (i.e., all members can live with the decision.)
   - Those parties directly affected by a decision must be given the opportunity to be at the table to participate in the consensus process when that decision is being discussed.
   - Members will respect the ideas and concerns of others.
   - Discussions will focus on interests and concerns rather than positions and demands.
   - Everyone will have an opportunity to speak. There will be no cross talking (i.e., only one person should be speaking at a time.)
   - Members will try to understand the interests of others, whether they agree with them or not.
   - Members will commit to fully explore issues, searching for solutions in a problem-solving and consensus-building atmosphere.
   - Members will communicate the interests of the group they represent. If there is uncertainty as to whether that is the case, members will make that known.
   - Any member may abstain from a decision to avoid preventing consensus. Minutes will note these occasions.
   - In the event of conflict between two or more members of the research team, efforts will first be made to resolve them within the group. Should it be required, an external mediator will be used to help clarify issues and goals, facilitate
communication about the situation, and try to help the parties in conflict reach a constructive resolution. The mediator will not make decisions about who is right or wrong or how things should be resolved. All decisions are made by the parties in conflict.

2. Project Spokesperson

Members of the steering committee will respond to media and other external communications requests by referring them to ________, who has been selected as the project spokesperson. ________ will brief Steering Committee members as requests are received. This is especially important for the community representatives who, depending on the nature of the request, may require approval from their respective organizations. ________ will include other team members in communication requests that address their particular contributions to the project.

3. Protection of Project Data

During the Project

During the project ________________ (PI name here), her research assistants, the project coordinator, and community based research assistants will be responsible for all research-related materials, which include interview and focus group tapes and transcripts, and any confidential field notes. These materials will be kept under lock and key. Each of the individuals participating in any aspect of data management (from collection, through transcription, analysis, and storage) will sign a confidentiality agreement. Data collected throughout the project will be used for the purposes of this project only.

At the End of the Project

_______________ (University PI name here), in following the policies of the University of Regina Research Ethics Committee, will store the primary research materials for a period of three years after the completion of the project, after which it will be destroyed. During the period of storage, the data will not be used for any purpose other than was outlined for this project.

Project data will be provided to the participants in the research, to the participating communities, to the health organizations in the North and Saskatchewan and to the universities in formats that protect the confidentiality of individual participants.

4. Communication of Project Progress and Results

**Throughout the Project**

In addition to face-to-face meetings and conference calls between Steering Committee members, a quarterly newsletter outlining progress will be produced. The quarterly newsletter will be suitable for distribution to council and health board members of the
participating organizations. The newsletter is the responsibility of the project coordinator, working with the principal investigator and other steering committee members as needed.

Preliminary results will be presented in the form of an interim report, for review and discussion by Steering committee members.

As opportunities for presenting findings arise for individual project team members, these will be brought forward to the steering committee for consideration and approval.

**At Project Completion**

Two versions of a final report will be produced. One version, which contains information specific to each of the participating communities, will be distributed only to these communities. A second version, stripped of details that would identify specific communities, will be released for public use. The public dissemination strategy may include a multimedia component, such as a video, that may be broadly used as an education/awareness tool.

Opportunities for the collective presentation of findings in written and oral formats will be pursued by team members.

Consent Statement

We, the undersigned, have read and understood the contents of this Memorandum of Agreement. We agree to act according to the principles and policies outlined above.

Signed, (all research team members are listed)

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This document is provided by Saskatchewan Population Health and Evaluation Research Unit, Universities of Regina and Saskatchewan.
Project Title:

The purpose of this memorandum is to provide the terms under which each community agrees to participate in the above project. The memorandum outlines the assistance provided by the community contact person and the products the researchers will return to the community.

For the purposes of this project, the community contact will be [list the contact names and contact information].

Primary Research Team: List Names of Individuals

The community contact agrees to:

- Assist the researchers with setting up meetings to interview key informants in the community
- Assist the researchers with setting up focus groups with Health Committee members and with community members
- Assist the researchers in identifying a community member who will be hired and trained to conduct interviews and assist with focus groups in the community
- Provide advice to the researchers on the appropriate methods of involving their community in this project
- Participate in periodic research team meetings to review the deliverables developed throughout the project
- Review information specific to their community to ensure that it accurately reflects their program information

The researchers agree to:

- Provide a document reviewing the literature in the area of Aboriginal health and capacity building
- Hire and provide training for any community members who may be selected to assist with interviews and focus groups
- Provide community specific models of each program delivered in the community that relate to health
- Provide a copy of the deliverables for review and comments
- Provide a manual suggesting the types of information that could be collected to assist with program planning and evaluation
- Provide ongoing updates on the project work through access to a web-site. Where accessing a web-site is difficult, a CD-ROM of all the information will be provided at regular intervals.
- At all times, the researchers will maintain confidentiality of information gathered from individual interviews and community focus groups.

This document describes the terms of reference for community agreement to participate in this project. Individual informed written consent will be obtained from those who agree to participate in the interviews and focus groups.

This memorandum will be reviewed periodically throughout the project to ensure that the project is being conducted in an appropriate manner in each community. Additional points may be added throughout the duration of the project.

_________________________________________  ____________________
Community Contact On behalf of [community name here] Date

_________________________________________  ____________________
Research Name On behalf of the research team Date

This document is provided by Saskatchewan Population Health and Evaluation Research Unit, Universities of Regina and Saskatchewan.
TL’AZT’EN NATION–UNBC CURA
MEMORANDUM OF UNDERSTANDING

This memorandum of Understanding stipulates the guiding principles for the conduct and governance of the TL’azt’en Nation–UNBC CURA project. It consists of five documents:

A) TL’azt’en Nation-UNBC CURA Guiding Principles
B) TL’azt’en Nation-UNBC CURA Conflict Management Guidelines
C) TL’azt’en Nation-UNBC CURA Governance Structures and Rules
D) TL’azt’en Nation-UNBC CURA Hiring Practices Policy
E) TL’azt’en Nation-UNBC CURA Protocol for Research Participants

We, the undersigned TL’azt’en Nation-UNBC CURA partners, agree to abide by these principles, guidelines and policies

Gail Fondahl - Principle Investigator
Sue Grainger – Co-Investigator, Research Stream Co-Leader
Erin Sherry – UNBC Research Coordinator I, Research Stream Co-Leader
Beverly Lopez – TL’azt’en Research Coordinator, Research Stream Co-Leader
Sarah Parsons – UNBC Research Coordinator II
Beverly Bird – Research Stream Co-Leader
Chris Jackson – Research Stream Co-Leader
Deborah Page – Research Stream Co-Leader
Jane Young – Research Stream Co-Leader
Amelia Stark – TL’azt’en Member-at-Large

This document is provided by the TL’azt’en Nation – University of Northern British Columbia research project entitled, Preparing for Resource Management. More information can be found at http://cura.unbc.ca.
TL’AZT’EN NATION–UNBC CURA
GUIDING PRINCIPLES

Purpose
The purpose of the Tl’azt’en Nation-UNBC CURA project is to enhance the capacity of Tl’azt’en Nation to effectively engage in culturally and ecologically sustainable natural resource management, and to enhance the capacity of UNBC researchers and their students to effectively contribute to First Nation community needs through collaborative research.

Objectives
✓ To strengthen the cultural development of the Tl’azt’en community by capturing resources and expertise to promote the transfer of TEK from older to younger generations;
✓ To enhance the social and economic potential of the Tl’azt’en community by providing the expertise to facilitate the development of alternative, culturally appropriate environmental/science curricula for Tl’azt’en youth; and by providing a map to ecotourism development, informed by robust research and Tl’azt’en values;
✓ To provide graduate training experience with First Nations partners that will foster knowledge of cross-cultural research requirements and experience in community-relevant research;
✓ To provide training and enhance research capacity among Tl’azt’enne in areas important to integrated natural resource management;
✓ To improve First Nations content across the curricula of UNBC’s academic programs;
✓ To ensure research results are available to regional, national and international audiences; and
✓ To enhance the potential of UNBC and Tl’azt’en Nation to develop and strengthen their partnerships.

Guiding Principles
1) Partners agree on the purpose and objectives of the Tl’azt’en Nation-UNBC CURA project in the CURA application.
2) Partners are committed to learning and building knowledge together.
3) Partners are committed to contributing in a variety of ways and forms, as necessary, to support those goals/objectives.
4) Partners will communicate openly, sharing all relevant information, knowledge, rationales, decisions, and feelings. (If a Partner feels s/he cannot share relevant information, e.g. due to confidentiality, s/he will provide the substance of that information, as well as a reason for not providing the direct information.)
5) Partners will actively listen to diverse and divergent points of view, and accept or tolerate individuality and difference respectfully.
6) Partners will work together to resolve conflicts, following agreed-upon guidelines
7) Additional Partners will be considered for inclusion in this partnership. (Any Steering Committee member can forward the name of a new Partner for
consideration at the next scheduled Steering Committee meeting, by forwarding
this as an agenda item to a CURA Research coordinator.)
8) Partners agree that clear and reasonable timelines are necessary; such milestones
bring focus, marshal key resources, and mark progress toward partnership.
9) Partners will be flexible and responsive to community and university needs, and
understand that these needs may be dynamic and shift over the duration of the
project as we become more informed about the issues, the processes and each
other.
10) Partners are accountable to both their communities (TI’azt’en Nation and UNBC)
and to the CURA process they have collaboratively established. All efforts will be
made to help each other reach project objectives.
11) Partners are committed to working cooperatively to reach the best solutions
through consensus decisions making. Where consensus cannot be reached, after
reasonable effort and exploration of alternatives, majority vote will be used for
decision making if necessary. However, Partners have common concerns and
believe that consensus offers the best opportunity for addressing them.
12) Partners acknowledge that participation and leadership are distributed among all
partners, assuring that the resources of every person are fully utilized.
13) Partners will be open to multiple methods and approaches.
14) Partners are committed to accurate reporting of research results in the public
domain, taking into account the need for confidentiality in gathering,
disseminating and storing information.
15) Partners will adhere to the “TI’azt’en Nation Guidelines for Research in TI’azt’en
Territory” and the Tri-Council Ethical Guidelines.

Definition

Partners in this document include TI’azt’en Nation-UNBC CURA Steering Committee
members, and other associated partners, including participating UNBC and TI’azt’en
senior researchers as appointed by the Steering Committee.
Participants in this document include partners (as defined above) as well as UNBC
graduate students, UNBC and TI’azt’en research associates and assistants and TI’azt’en
‘Pros’, for the duration of each person’s active involvement in the CURA Research.

Procedure

Partners will declare their agreement with these Guiding Principles by signing the
TI’azt’en Nation-UNBC CURA Memorandum of Understanding. New partners will also
sign this document. All potential participants will be asked to read and sign a TI’azt’en
Nation-UNBC CURA Research Protocol prior to their participation.
Sample 5 – Bayline Regional Round Table Terms of Reference

These Terms of Reference have been provided as a sample courtesy of the Bayline Regional Round Table. For more information on the Bayline RRT visit http://baylinerrt.cimnet.ca.
I. INTRODUCTION

The purpose of this document is to provide the Bayline Regional Roundtable Inc. (BRRT Inc.) with some basics as to their responsibility and roles in looking after the needs/projects of the BRRT Inc..

The BRRT Inc. members include two (2) representatives from the communities of: Cormorant, Ilford, Pikwitonei, Thicket Portage, Wabowden and War Lake First Nation.

One of these representatives must be an elected official of Council and the other representative is at the sole discretion of his/her Council.

II. The Bayline Regional Roundtable Inc.

1. Definition of Bayline Regional Roundtable Inc.

The Bayline Regional Roundtable Inc. is a forum where communities located along the Bayline Rail-line (Hudson Bay Railway) come together to discuss topics and issues of common concern.

2. Undertaking of the Corporation is restricted to the following

To work collaboratively with Bayline communities in dealing with issues of common concern; to build capacity in the region where communities can take ownership in their destiny; to nurture community and regional pride; to carry out projects/programming; to advance the initiatives of the corporation.
III. RESPONSIBILITIES OF EXECUTIVE & MEMBERS OF BRRT INC.

A) The BRRT Inc. Members are directly responsible to manage and provide initiatives to its Bayline communities:

To ensure financial administration of BRRT Inc. funds by:

- Preparing and approving annual operating budget
- Reviewing financial reports and ensuring any, if necessary, corrective steps are taken
- Ensuring purchasing is approved annually by whom and maximum amount
- Reviewing and approving financial reports monthly
- When discussing a specific issue, members will ensure inclusion of community residents involved or affected by that issue
- When an individual community hosts a BRRT Inc. meeting, members will ensure that community residents will be invited and encouraged to observe and participate
- BRRT Inc. will work to ensure that Transportation Facilities, Education, Culture, Housing, Health and Social Development services which are provided by other agencies, in a manner that is acceptable to the residents of the Bayline communities.

B) The BRRT Inc. Executive shall consist of a President, Vice-President, Secretary and Treasurer.
These positions are elected annually through a nomination process every March at a meeting of the BRRT.

**DUTIES OF THE PRESIDENT OF THE BRRT INC.**

- BRRT Inc. representative
- Serve as Official spokesperson of BRRT Inc.
- Ensure decisions are made
- Can vote in consultation with other member from his/her community
- Ensures finances are in good order
- Seeks information from and distributes same to residents
- Act in the best interests of the BRRT Inc.
- Know BRRT limitations and BRRT Inc. directives
- Guard against Conflict of Interest
- Ensure training is provided as required by BRRT Inc. members
- Make objective and unbiased decisions
- Serve as signing authority

**DUTIES OF THE VICE-PRESIDENT OF THE BRRT INC.**

- In the absence of President, assume the duties of President
- Serve as signing authority

**DUTIES OF THE TREASURER OF THE BRRT**

- Supervises staff on financial matters
- Presents financial report at each meeting
- Oversees Annual Audit of Financial Statements
- Serve as signing authority

**DUTIES OF THE SECRETARY**

- Ensure minutes of meetings are recorded and distributed
- Manage correspondence
- Serve as signing authority
DUTIES OF MEMBERS OF THE BRRT INC.

- Presents issues/minutes from the BRRT Inc. to their community and council
- Share information/resources from their community to BRRT Inc.
- Seek and distribute information to residents
- Act in best interest of the community
- Promote good relations
- Attend all meetings
- Participate in BRRT Inc. discussions and decisions
- Know BRRT Inc. limitations and directives
- Manage and account for funds
- Provide supervision and guidance
- Accept responsibility for BRRT Inc. decisions and publicity support decisions
- One member from each community to serve as a signing officer

DUTIES OF EXECUTIVE DIRECTOR OF BRRT INC.

- Attend all BRRT Inc. meetings
- Prepares minutes of all meetings
- Maintains BRRT Inc. files
- Responds to correspondence upon BRRT Inc. direction
- Provides BRRT Inc. records for inspection
- Reviews and advises on programs
- Participate in training programs
- Coordinates application process on projects/initiatives identified by BRRT Inc.
- Other duties as assigned

BRRT INC. TERMS OF REFERENCE

Page 4 of 8

as of 02 November 2005

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DUTIES OF MEETING CHAIRPERSON

- The role of meeting Chair shall rotate between the community representatives
- Shall serve as the meeting manager
- Chair the meeting
- Prepare the site, invite community members and arrange for refreshments
- Determine the location of the next meeting
- Designate the next chair
IV. MEETING MANAGEMENT

EXECUTIVE DIRECTOR

- Prepares agenda
- Request approval to pay accounts. The invoices that are re-occurring are approved by blanket resolution at start of new fiscal year. All new bills will be listed and brought to the meeting for approval
- Presents correspondence
- Records minutes and resolutions. Must ensure minutes of all meetings of BRRT Inc. are recorded and that they contain all decisions made. The decisions should all be done by resolution. Minutes are legal documentation of BRRT affairs.

MEETING CHAIRPERSON

- Ensures there is a quorum. No decision is legal without BRRT Inc. majority
- Conducts an orderly meeting. As chairperson of the meeting, the President is responsible to ensure the speakers remain on the topic and in control of lengthy discussions.
- Ensures everyone has a chance to voice their opinion. The President as the Chairperson of the meeting should encourage all BRRT Inc. members to participate in the discussions.
- Ensure decisions are done by resolution and carried by majority vote.

MEMBERS

- Shall attend all BRRT Inc. meetings
- Shall participate in discussions
- Shall represent concerns and views of their community
- Shall conduct themselves in an orderly manner
DECISION-MAKING

- Must be approved by the majority
- Must be within BRRT’s Inc. authority
- Must represent community views
- Should be based on the best possible available information

CONFLICT OF INTEREST

- A member/staff of BRRT Inc. cannot use his/her position for direct personal gain, and must excuse themselves from the meeting if there may be a conflict and so be noted in the minutes.

- The member/staff of the BRRT Inc. must declare his/her conflict.

- A conflict of interest arises when a BRRT Inc. member/staff takes advantage of his/her position on the BRRT Inc. to benefit him/herself or his/her immediate family. “Immediate Family” usually refers to mother, father, husband, wife, son, daughter, brother or sister.
V. FINANCIAL MANAGEMENT

The fiscal year end shall be April 1 - March 31 of each year.

It is important that BRRT Inc. knows its financial position. There are sources that you can obtain this information from:

- Budget
- Monthly Financial Report
- Cash Flow Report

Project Grants

Is money BRRT Inc. receives through various agencies for funding of specific community projects/initiatives.

Operating Funds

Grants, donations, in-kind contributions to further the objectives of the BRRT Inc.

<table>
<thead>
<tr>
<th>COMMUNITIES</th>
<th>REPRESENTATIVE</th>
<th>ELECTED</th>
</tr>
</thead>
<tbody>
<tr>
<td>Cormorant</td>
<td>Composition may be two (2) elected officials of Council; or one (1) elected</td>
<td>At the discretion of his/her</td>
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<td></td>
<td>official of Council, and one (1) designate/representative at the sole discretion of Council</td>
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<td>Ilford</td>
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<td>Pikwitonei</td>
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<td>Thicket Portage</td>
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<td>Wabowden</td>
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<td>War Lake</td>
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</tbody>
</table>

BRRT INC. TERMS OF REFERENCE  Page 8 of 8  as of 02 November 2005
Sample 6 - Research Agreement

This sample research agreement is from the Guidelines for Health Research Involving Aboriginal Peoples (2006, Draft). This document is available at www.cihr-irsc.gc.ca/e/29134.html.
Before distribution of the final report, or any publication, or contact with the media, the community will be consulted once again as to whether the community agrees to share this data in that particular way.

8. Project progress will be communicated to the community in these agreed ways:

9. Communication with the media and other parties (including funding agencies) outside the named researchers and the community will be handled in these agreed ways:

FUNDING, BENEFITS, & COMMITMENTS

Funding

The main researchers have acquired funding and other forms of support for this research project from:

The funding agency has imposed the following criteria, disclosures, limitations, and reporting responsibilities on the main researchers.

Benefits

The main researchers wish to use this research project for benefit in these ways (for instance, by publishing the report and articles about it):

The researchers will publish a final report to the funding agency in 2001. Scientific presentations in peer-reviewed conferences and publications will be made. The final report will be reviewed by community members prior to publication. Scientific presentations and articles will be published after discussion with the respective communities' leaders.

Benefits likely to be gained by the community through this research project are:

- Educational
- Informational
- Financial

Commitments

The community’s commitment to the researchers is to:

- Recommend capable and reliable community members to collaborate/be employed in this project.
- Keep informed on the project progress, and help in leading the project toward meaningful results.

The researcher's main commitment to the community is to:

- Inform the community as to the project progress in a clear, specific, and timely manner.
- Act as resource to the community for nutrition-related questions.

The researchers agree to stop the research project under the following conditions:

- If community leaders decide to withdraw participation.
- If the researchers believe that the project will no-longer benefit the community
TL'AZ'T'EN NATION–UNBC CURA
CONFLICT MANAGEMENT GUIDELINES

Prologue
Unresolved misunderstandings or differences can threaten the functionality of any partnership. While conflict must be recognized as inevitable and normal, and even sometimes resulting in benefits, it must also be dealt with. TL’azt’en Nation and UNBC CURA partners have thus established a Conflict Management procedure to promote conflict prevention and to realize conflict management within the project. Conflicts involving a CURA participant with an external person or persons will be brought to the attention of the supervisor of that participant to discuss applicable procedures.

Principles & Procedures
✓ Partners are committed to acknowledging, managing and resolving conflict.
✓ Agreements reached will optimize joint outcomes. Efforts will be made to prevent conflict by group dynamic training.
✓ In addressing conflicts, Partners and other Participants will commit to focus on solutions to the problem, not the person with whom they are experiencing conflict.
✓ Conflict involving Participants should be addressed as soon as possible.
✓ In the first instance, a participant believing her/himself to be in conflict with another should speak directly to the person s/he is having an issue with as soon as possible to try to resolve the conflict.
✓ If resolution is not possible using direct engagement, the Participant believing her/himself in conflict should consult her/his immediate CURA supervisor for assistance in resolving the conflict.
(e.g. a TL’azt’en Research Stream Leader will try to resolve the conflict of a TL’azt’en research assistant; UNBC supervisor of a graduate student will try to resolve the that student’s conflict; the CURA PI will try to resolve the conflict of a UNBC research stream leader or UNBC Research Coordinator; the co-I will try to resolve a conflict of a TL’azt’en research stream leader or TL’azt’en Research Coordinator) If conflict arises between two members with different supervisors, both supervisors will be involved.
✓ If a supervisor becomes aware of a conflict, but has not been approached for assistance to resolve it, the supervisor may offer assistance.
✓ The approach taken by the supervisor(s) will in the first instance be informal, as long as no major misconduct has taken place.
✓ The supervisor(s) will have separate meetings with each Participant in the first instance to find out the background.
✓ The supervisor(s) will encourage each party to consider solutions to the problem.
✓ Each individual meetings will be followed by a joint meeting, where solutions will be suggested and discussed.
✓ If agreement cannot be reached at this meeting, the meeting may be referred to the next level of supervision.

This document is provided by the TL’azt’en Nation – University of Northern British Columbia research project entitled, Preparing for Resource Management. More information can be found at http://cura.unbc.ca.
✓ The Expert Resource Pool will be used as the final (internal) source of mediation. The Steering Committee will discuss resolution before soliciting the Expert Resource Pool’s assistance for conflict resolution.
✓ Following mediation (at any level) the parties are expected to abide by the terms and spirit of their agreement and to fulfill the terms on their own initiative.
✓ Should disagreements arise over implementation, the parties again may seek the assistance of their supervisors to manage/resolve the conflict.
✓ Supervisors involved in conflict management will ensure and respect the confidentiality of those involved in the conflict.

Records
Records pertaining to mediation, dispute resolution, and agreements may be kept by the Steering Committee. It is expected that records will be kept of any serious and formal disputes. These records will remain confidential (under lock), and sealed when the conflict resolution is completed. All such records will be destroyed at the end of the CURA project. In cases where one or more members of the Expert Resource Pool mediate(s), a member will be asked to keep, and in time destroy such records.

Definition
Partners in this document include TI’azt’en Nation-UNBC CURA Steering Committee members, and other associated partners, including participating UNBC and TI’azt’en senior researchers as appointed by the Steering Committee.
Participants in this document include partners (as defined above) as well as UNBC graduate students, UNBC and TI’azt’en research associates and assistants and TI’azt’en ‘Pros’, for the duration of each person’s active involvement in the CURA Research.
TL'AZT'EN NATION–UNBC CURA
GOVERNANCE STRUCTURE AND RULES

The TL'azt'en Nation-UNBC CURA will be governed by the Steering Committee (SC), which is composed of the Principle Investigator, Co-Principal Investigator, TL'azt'en and UNBC Research Coordinators, the two Research Stream Leaders from each of the four Research Streams, and two TL'azt'en Members-at-Large (appointed by Chief and Council).

Regular SC meetings will occur bi-monthly; special meetings may be called as necessary. SC members are expected to diligently try to attend all meetings. SC meetings will be chaired by the PI or Co-I, should the PI be unavailable. The PI is responsible for developing and circulating meeting agendas, and providing an update on budget expenditures at each meeting. The PI will solicit input for the agenda from all SC members. If the PI or Co-I intend to be absent from the province for extended periods of time, they may request that another member of the SC adopt their duties.

All SC members, including the Chair, have voting privileges. The SC will try to reach decisions through consensus. When impossible, voting will follow Robert's Rules of Order (latest edition) respecting the tabling of formal motions and conduct of secret ballots. Proxy voting is not allowed. Meetings will alternate between UNBC and TL’azt’en territory, with an annual meeting at Cinnabar Resort (RRF). When necessary, SC members may attend the meeting by phone from one of the two research communities (PG/UNBC or Tache/TL’azt’en Nation).

UNBC researchers, TL’azt’en experts, TL’azt’en research assistants, UNBC graduate and undergraduate research assistants who are involved on a regular basis in the CURA research may also attend the SC meetings as observers. They do not vote, and the SC retains the right to call informal sessions to discuss issues and adopt decisions, where confidentiality is necessary.

The TL’azt’en and UNBC Coordinators will share the responsibility for taking meeting minutes. Minutes will be circulated to members no later than two weeks following each meeting. Upon adoption of the minutes at the next SC committee meeting, they will be condensed and posted to the CURA web-site (http://cura.unbc.ca).

New partners may be invited to join CURA. Any steering committee member may propose the name of a new partner at a regular steering committee, or a special meeting called for that purpose. The intention to propose a new partner must be submitted to the PI for inclusion on the agenda of the next meeting, before the agenda is circulated. New partners can be proposed as SC members (with voting privileges) or as Associated Partners (without voting privileges on the SC). Decisions regarding new partners will be made through consensus of all current SC members attending a meeting in person or by phone.
Each pair of Research Stream Leaders will submit a 3-year workplan for the first 36 months of the CURA project (for the Milestone Report and a 2 year workplan, after the SSHRC midterm review, for the final two years. The SC will prioritize proposed activities, and allocate resources, using the CURA proposal budget as its general guidelines.

Each partner will focus on the development of research approaches most likely to produce representativeness, comprehensiveness, and defensible outcomes. The SC will ensure that standards of quality are met.

Partners agree to keep records of CURA resource use and regularly submit expenses and accompanying documentation (receipts) for reimbursement.
TL’AZT’EN NATION—UNBC CURA
HIRING PRACTICES POLICY

Hiring for CURA positions will follow an open and competitive process. Duties and qualifications of positions will be clearly described, and positions will be appropriately advertised. The terms of appointment will be specified. For any position that might last longer than one year, a year term will be specified, with renewal contingent on an evaluation of performance.

Hiring for major positions, including those with representation on the SC, will be done by hiring committees consisting of a subset of SC members (to be decided at regular SC meetings). The PI and Co-I will be involved in major hiring procedures. Applicants will be expected to submit a letter of application, resume and contact information for at least three references. Letters of reference will be solicited for short-listed candidates, and interviews conducted.

Hiring of UNBC undergraduate and graduate RAs will be done by UNBC partners. Hiring of TL’azt’en RAs will be done by TL’azt’en Nation partners. Research stream leaders, the PI and Co-I, and the CURA Research Coordinators will be kept informed of all new employees.

Hiring decision will be transparent and accountable. For each major hiring the Hiring Committee will document the process and submit this to the SC. The report will explain the specific procedures used, number of applicants, and outcomes. For other hirings, the responsible person will provide a report to either the TL’azt’en Nation or UNBC coordinator. After the interview and selection process, all files related to hiring will be returned to the chair of the hiring committee, who will archive one copy for one year, and destroy the remaining copies. Reports should maintain confidentiality.
TL’AZT’EN NATION–UNBC CURA
PROTOCOL FOR RESEARCH PARTICIPANTS

As a researcher participating in TL’AZT’EN Nation-UNBC CURA research, I recognize and support the following principles:

☑ I agree to principles of respect, transparency, and accountability in my research.
☑ I will familiarize myself with, and adhere to, TL’AZT’EN Guidelines for Conducting Research within TL’AZT’EN Traditional Territory, and Tri-Council Ethics Policy, and follow these guidelines.
☑ I will respect the confidentiality of knowledge, persons and places deemed to be sensitive or protected. Where there is uncertainty, I will consult my supervisor.

I understand that data and results from CURA research will be made available to all CURA partners. Technical reports, extensions notes, newsletter articles will be made broadly available through internet posting. As appropriate, all data and results will be archived according to Participant requirements as identified through informed consent.

The CURA supports collaborative dissemination of research results in a multiplicity of forms for a variety of audiences. I understand that researchers have the right to publish the results from studies which they are involved in provided that:
a) CURA partners are provided with copies of draft manuscripts for review and comment prior to publication
b) The support and role of the CURA and SSHRC be acknowledged formally in the body of all manuscripts, posters, and other materials made public
c) The support and role of persons involved in the research project be acknowledged formally in accordance with the wishes of these persons.

Name: ___________________________ (print)
Signature: _________________________
Date: _______________________________
TL'AZT'EN NATION GUIDELINES for RESEARCH IN TL'AZT'EN TERRITORY

1. Purpose
These guidelines have been developed to help ensure that, in all research sponsored and supported by the Tl'azt'en Chief and Council, appropriate respect is given to culture, language, knowledge and values of the Tl'azt'en, and to the standards used by Tl'azt'en to legitimate knowledge. These guidelines represent the standard of "best practice" adopted by the Tl'azt'en Chief and Council.

2. Principles
A. As Tl'azt'en we have distinctive perspectives and understandings, deriving from our culture and history and, embodied in Tl'azt'en language. Research that has Tl'azt'en experience as its subject matter must reflect these perspectives and understandings.
B. In the past, research concerning Aboriginal Peoples has usually been initiated outside the Aboriginal community and carried out by non-Aboriginal personnel. Aboriginal people have had almost no opportunity to correct misinformation or to challenge ethnocentric and racist interpretations. Consequently, the existing body of research, which normally provides a reference point for new research, must be open to reassessment.
C. Knowledge that is transmitted orally in the cultures of Aboriginal Peoples must be acknowledged as a valuable research resource along with documentary and other sources. The means of validating knowledge in the particular traditions under study should normally by applied to establish authenticity of orally transmitted knowledge.
D. In research portraying community life, the multiplicity of viewpoints present within Tl'azt'en Communities should be represented fairly, including viewpoints specific to age and gender groups.
E. Researchers have an obligation to understand and observe the protocol concerning communications within any Tl'azt'en community.
F. Researchers have an obligation to observe ethical and professional practices relevant to their respective disciplines.

3. Guidelines
Aboriginal knowledge
In all research sponsored and/or supported by the Chief and Council, researchers shall conscientiously address themselves to the following questions:
A. Are there perspectives on the subject of inquiry that are distinctly Aboriginal?
B. What Aboriginal sources are appropriate to shed light on those perspectives?
C. Is proficiency in Dakelh required to explore these perspectives and sources?
D. Are there particular protocols or approaches required to access the relevant knowledge?
E. Does Aboriginal knowledge challenge in any way assumptions brought to the subject from previous research?
F. How will Aboriginal knowledge or perspectives be portrayed in research products and/or how will these be validated?

-1-

Approved by Tl'azt'en Nation Chief and Council Resolution - May 5, 1998

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Consent
A. Informed consent shall be obtained from all persons and groups participating in research. Such consent may be given by individuals whose personal experience is being portrayed, by groups in assembly, or by authorized representatives of communities or organizations.
B. Consent should ordinarily be obtained in writing. Where this is not practical, the procedures used in obtaining consent should be recorded.
C. Individuals or groups participating in research shall be provided with information about the purpose and nature of the research activities, including expected benefits and risks.
D. No pressure shall be applied to induce participation in research.
E. Participants should be informed of the degree of confidentiality that will be maintained in the study.
F. Participants should be informed of the degree of confidentiality that will be maintained in the study.
G. Informed consent of parents or guardian and, where practical, of children should be obtained in research involving children.

Collaborative Research
A. In studies located principally in Tl'azt'en communities, researchers shall establish procedures to enable community representatives to participate in the planning, execution and evaluation of research results.
B. In studies that are carried out in the general community and that are likely to affect particular Tl'azt'en communities, consultation on planning, execution and evaluation of results shall be sought through appropriate Tl'azt'en committees.
C. In community-based studies, researchers shall ensure that a representative cross-section of community experiences and perceptions is included.

Review Procedures
A. Review of research results shall be solicited both in the Tl'azt'en community and in the scholarly community prior to publication or dissemination of research findings.

Access To Research Results
A. Tl'azt'en Chief and Council shall maintain a policy of open public access to final reports of research activities except in cases involving information deemed to be confidential and/or sensitive. Reports may be circulated in draft form, where scholarly and Tl'azt'en community response is deemed useful.
B. Research reports or parts thereof shall not be made public where they are reasonable grounds for thinking that publication will violate the privacy of individuals or cause significant harm to Tl'azt'en communities or organizations.
C. Results of community research shall be distributed as widely as possible within participating communities, and reasonable efforts shall be made to present results in Tl'azt'en technical language and in Dakelh languages where appropriate.

Acknowledgments
A. All Tl'azt'en who contribute to the research must be acknowledged during and after project.
B. Due credit must be given to Tl'azt'en Nation and Tl'azt'en in the dissemination of research results.

Approved by Tl'azt'en Nation Chief and Council Resolution - May 5, 1998

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Ownership/Copyright
A. Tl'azt'en Nation reserves the right to be the sole beneficiary of all commercial gains that may be attained through the dissemination of all research results and/or the marketing and sale of products that may be derived from research results.

Community Benefit
A. In setting research priorities and objectives for community-based research, the investigators shall give serious and due consideration to the benefit of Tl'azt'en communities.
B. In assessing community benefit, regard shall be given to the widest possible range of community interests, whether groups in question be Tl'azt'en or non-Tl'azt'en, and also to the impact of research at the local, regional or national level. Wherever possible, conflicts between interests within the community should be identified and resolved in advance of commencing the project. Researchers should be equipped to draw on a range of problem-solving strategies to resolve such conflicts as may arise in the course of research.
C. Whenever possible research should support the transfer of skills to individuals and increase the capacity of the community to manage its own research projects.

Implementation of Guidelines
A. These guidelines shall guide the activities of all individuals, groups, funding agencies, organizations, and communities conducting research sponsored and supported by Tl'azt'en Chief and Council.
B. It shall be the responsibility, in the first instance, of all the researchers to observe these guidelines conscientiously. It shall be the responsibility, in ascending order, of investigators/researchers, Tl'azt'en Administration, and Tl'azt'en Chief and Council itself to monitor the implementation of the guidelines and to make decisions regarding their interpretation and application.
C. Where, in the opinion of the researcher or the research manager, local circumstances make these guidelines or any part of them inapplicable, such exception shall be reported to Chief and Council through the appropriate Tl'azt'en administrative branch, and the exception shall be noted in the research contract or contract amendments as well as in any subsequent publication(s).

Research Contracts
A. Once an agreement is developed between Tl'azt'en Nation and a particular group of researchers about the nature, duration and purpose of research activities, the researchers will be expected to state (in writing) their agreement to follow Tl'azt'en Nation guidelines.
B. Depending on the nature and scope of the particular research activity, Tl'azt'en Nation and the researcher(s) may develop a detailed research contract which addresses the specifics of the particular research project at hand.

Approved by Tl'azt'en Nation Chief and Council Resolution - May 5, 1998
Sample 8 - Oath of Confidentiality- Brandon University

I, ___________________________, affirm that I will do disclose or make known any matter or thing related to the participants that comes to my knowledge during this project.

Name ___________________________ Date ___________________________

Witness ___________________________ Date ___________________________
Creating Photo Stories

Photo Story Instructions
Photo Story is a Microsoft based program that is available free of charge to Microsoft Windows subscribers. The program can be downloaded from www.microsoft.com/windowsxp/using/digitalphotography/photostory/default.mspx.

The following are instructions from the website on how to use Photo Story.

Capture Memories with Photo Story 3
The easiest way to do more with your digital photos
Published: October 27, 2004

Share all your special occasions and everyday life moments with family and friends in a whole new way. With Photo Story 3 for Windows, your digital photos will come to life with motion, music, voice narration, and more.

It’s a snap to get started! Just follow these simple steps:

1. Take photos directly from your camera to a computer. Transfer digital photos from over 250 digital cameras and scanners directly to your computer by using Windows XP.

2. Create your photo story. Choose your favorite photos on the computer or from online photo-service collections. Photo Story drops them onto a storyboard so that you can quickly organize them into your own personal storybook.

3. Use smart touch-up features to enhance your photos. Photo Story 3 has all of the essential photo-editing tools you need.
   • Instantly remove red-eye, correct lighting, and fix color imperfections.
   • Use picture rotation and cropping tools to easily customize each photo.

Easy to use touch-up features make it a breeze to enhance your photos.
Bring Photos to Life with Photo Story 3
The ultimate way to express your creativity
Published: October 27, 2004

Make your photo stories as unique and personalized as you like. Even if you’re a beginner, you’ll be amazed at how easy it is to add special effects, music, and other professional touches to enhance your digital photos.

- **Put a voice to your story.**
  Make your photo story even more special by telling it in your own words. With Photo Story 3, you can record your own voice commentary to describe favorite photos.

- **Add excitement with motion.**
  Let Photo Story 3 automatically put your photos in motion or create your own dramatic effects by choosing custom panning and zooming options.

- **Create an original soundtrack.**
  Choose songs from your music library, or with just a few mouse clicks, compose original tunes directly within Photo Story 3. You can make your music as fun or funky as you like.

Use music to add personality to your photo stories.
• **Add stunning special effects and transitions.**
  Make a photo story even more unique by adding special effects like black and white, sepia, or watercolor to one or more of your photos. Then, choose from more than 40 transitions like diagonal wipes, flips, and page curls to add visual impact between photos.

![Image of Photo Story 3 interface]

Create the look you want with special effects.

• **Write your own captions and titles.**
  Express your creativity by adding professional-looking titles and captions to any photo in your story.

---

**Share Your Stories with Photo Story 3**

**Connect with your friends and family in a whole new way**

Published: October 27, 2004

Now it’s easier than ever to share your photo stories with family and friends. When you save a story, Photo Story 3 compresses your digital photos into a single small file that automatically preserves the great picture quality. E-mail it to family and friends. Then watch it on a computer, TV, or portable device—without the hassle of large file sizes.

• **Reach loved ones online** by sending your stories in an e-mail message or sharing them on the Web.

• **Watch your photo stories at home** on a Windows XP–based computer, or gather everyone on the couch and watch your stories in your own living room using Windows XP Media Center Edition 2005.

• **Take your photo stories with you** and watch them on the coolest new portable devices with Windows Media Player 10 Mobile, including Windows Mobile–based Pocket PCs, Portable Media Centers, and Smartphones.

• **Give one-of-a-kind gifts** by burning your favorite stories to a CD that your family and friends can watch on a computer, TV, or portable device. Special profiles in Photo Story 3 make your videos look great when you burn them to a disc using CD or DVD copying software.
Choose how you want to save your photo story based on how you’re going to share it.

**Note** Windows Media Player 10 Mobile is available on many new Windows Mobile 2003 Second Edition-based Pocket PCs, Smartphones, and Portable Media Centers. To find out which Windows Mobile-based devices have Windows Media Player 10 Mobile, see the [Windows Media Player 10 Mobile](http://www.microsoft.com/windows/windowsmedia/player10) page.
References


Canadian Institutes of Health Research, Social Sciences and Humanities Research Council of Canada, & Natural Sciences and Engineering Research Council (1998). Ethical conduct for research involving humans. Ottawa, ON: Authors.


Website Resources

Brandon University Research Office – www.brandonu.ca/administration/vpacademic/research/committees/ethics.asp

Centre for Teaching and Learning, Queen’s University – www.queensu.ca/ctl


International Development Research Centre – www.irdc.ca

Microsoft Photo Story

University of Northern British Columbia CURA Project – www.unbc.ca

University of Regina – www.uregina.ca

University of Saskatchewan – www.usask.ca
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Collaborative Evaluation Handbook Feedback Form

Name (optional) ________________________________________________

1. Does the Handbook provide an understanding of the community collaboration process?
   □ Yes □ No. If no, please elaborate. __________________________________________

2. Does the Handbook provide an understanding of the collaborative evaluation process?
   □ Yes □ No. If no, please elaborate. __________________________________________

3. Do you think you will use the Tools and Resource section? □ Yes □ No

4. What other tools and resources would you like to see in this section? ______________

5. Are there sections that are missing and could be added to the Handbook? Please elaborate. ______________

6. Any other suggestions for improving the Handbook?

7. Please provide any other comments you have on the Community Collaboration and the Collaborative Evaluation processes. ______________

Please return your comments to RDI.

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