

# **“A Performance Measurement System for Okanagan College International Education – Supporting the Learning Organization”**



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## EXECUTIVE SUMMARY

Okanagan College International Education (OCIE) is pro-actively searching for a system of metrics and measurement in response to new reporting requirements at Okanagan College (College) as influenced by performance-related activity at the Ministry of Advanced Education (Ministry). This report focuses on the context and design of a performance measurement (PM) system meant to generate information in support of the development, implementation, review and renewal of OCIE's programs and services. OCIE has the potential to benefit from more informed decision-making by introducing a process to maximize the efficiency and effectiveness of current and future resources in a supportive and collaborative environment.

OCIE's PM system is one tool in the Ministry and College strategic planning and reporting processes. The PM system links OCIE with both these external stakeholders through key objectives, and to OCIE's internal stakeholders through the engagement and involvement of all OCIE staff in verifying its design and supporting implementation. It is equally important however that the context in which the PM system is to exist, for instance, how organizational performance will be viewed, the impetus behind operational change, and the formative or summative use of information, is clearly communicated (Lawton, et al, 2000). Establishing the link between the PM system for OCIE, and performance activity being led by the Ministry will contribute to discussions on performance reporting currently being led by the Board and Executive at the institutional level.

The report provides the contextual background information for OCIE's PM system, followed by a comprehensive literature review on PM systems and the Learning Organization. The review provides a background in the use of PM systems in the private and public sector; their potential contributions in the public sector environment; and the limitations in measuring performance that, with this understanding, can lead to clearer expectations and greater success in the implementation of a PM system. Complementing this literature is the convergence of interests found in the theory of the learning organization, and how the simultaneous development of this organizational culture can further support a PM system as one component of a comprehensive management and evaluative strategy.

The "Findings and Analysis" section of the report describes the development of, and provides the framework for, a practical performance measurement system to meet the current and future needs of OCIE. Identification of programs and services, their relationship to the College key directions, and key performance measures to record activity at OCIE, have been encompassed in a departmental Logic Model that provides a visual description of what OCIE does, and what it intends to accomplish. The capacity to develop defensible measures and procedures to link measures of program theory (constructs) into observables (outcomes) will continue to grow through professional development and use over time. Implementing this system for OCIE will require recognition of the integrative potential of the learning organization principles, and of the value of a measurement process that supports and facilitates individual and organizational learning for the International Education department, OC, and their students.

The report recommendations include regularly identifying, collecting and reporting selected performance measures as a management tool, which, with increased capacity and evaluative

support, will provide a link in the future between performance measurement and strategic planning. As a complement to this management tool, adhering to the principles of the learning organization in the creation of information generating and communicative processes is suggested to help orchestrate the significant change in culture required to facilitate the successful use of performance measures. The three key recommendations and five steps in the design and implementation of a performance measurement system for OCIE include:

- I. **Adopt the Model of Strategic Success for OCIE**
  1. verify the logic model with stakeholders
- II. **Build Structures & Processes to Align Systems & Strategies**
  2. implement the plan for measuring performance and learning
  3. support implementation through both the collection and processing of data on a consistent and regular basis
  4. engage all staff through a departmental review of OCIE performance/learning
- III. **Seek External Evaluation**
  5. evaluate the causal linkages

Collaborative efforts with various institutional resources, combined with identification of support within OCIE of change leaders that will anticipate, lead and manage the learning process over time, can reduce concerns over resource and time constraints (Watkins, 2005). Incorporating a performance measurement system that supports the key objectives identified in the logic model will require minimal resources as the model has been based on OCIE current practices. As suggested by McLaughlin et al. (1998), introducing a process that includes a feedback relationship involving all stakeholders in the development of both the performance story and the measurement plan creates a shared vision with clear and shared expectations of success. With an inclusive process, including a request for implementation support from Human Resources in the development of a learning and performance culture, along with support from Institutional Research in measuring activity, OCIE would be well positioned to lead as an example institutionally.

Over time, the department's capacity in the development and use of performance measures will increase in support of personal and organizational learning, as well as inform the mission, values and goals of Okanagan College. The dual challenge for OCIE is to implement a performance measurement system that, while identifying, collecting and reporting key indicators of performance, equally recognizes the contextual factors that condition performance. This requires a culture shift to collective and constructive systems where communication in itself becomes a strategic activity, accountability moves from 'compliance' towards 'learning,' and the focus moves from measurement per se to communication about performance (Thomas, 2006).

The simultaneous building and support of two cultures could lead to a new cultural standard for the institution through a positive symbiotic relationship between performance and learning. The Ministry of Advanced Education recognizes the importance, and challenge, of this evolution in the use of performance measures, and thus implicitly supports the formative nature of the proposed performance measurement system for the International Education department at Okanagan College.

## TABLE OF CONTENTS

<b>EXECUTIVE SUMMARY .....</b>	<b>2</b>
<b>TABLE OF CONTENTS .....</b>	<b>4</b>
<b>1.0 INTRODUCTION .....</b>	<b>6</b>
<b>2.0 BACKGROUND .....</b>	<b>8</b>
2.1 Ministry of Advanced Education Accountability Framework.....	8
2.2 Okanagan College .....	10
2.3 Okanagan College International Education.....	11
<b>3.0 METHODOLOGY .....</b>	<b>13</b>
<b>4.0 LITERATURE REVIEW.....</b>	<b>14</b>
4.1 Performance: Management, Cycle, Measurement, Measures?.....	14
4.2 Performance Measurement Systems.....	16
4.3 Challenges in Measuring Performance.....	18
4.4 Performance in a Learning Organization.....	20
<b>5.0 FINDINGS AND ANALYSIS.....</b>	<b>22</b>
5.1 A Performance Measurement System for Okanagan College International Education.....	22
5.2 Logic Model.....	23
5.3 Components, Outputs, and Outcomes .....	28
<b>6.0 NEXT STEPS.....</b>	<b>34</b>
<b>7.0 CONCLUSION .....</b>	<b>37</b>
<b>8.0 REFERENCES.....</b>	<b>38</b>
<b>9.0 APPENDICES.....</b>	<b>45</b>
Appendix A: Okanagan College – Chain of Accountability.....	46
Appendix B: Okanagan College Key Directions .....	47
Appendix C: Okanagan College International Education: Programs and Services.....	48
Appendix D: Public Sector Performance Management – Management Processes .....	49
Appendix E: The Multiple Aims of Performance Measurement .....	50
Appendix F: The Learning Environment.....	51
Appendix G: Performance Management Cycle - Program/Service Review and Renewal.....	53

Appendix H: Designing and Implementing Performance Measurement Systems .....	54
Appendix I: Existing Entry Surveys .....	55
Appendix J: Existing End Semester/Program Surveys .....	60
Appendix K: Existing Exit Interview.....	66
Appendix L: Existing Host Family Evaluation.....	69
Appendix M: Existing New Student Interview .....	71
Appendix N: Proposed Discussion Report - Program/Service Review.....	76

## 1.0 INTRODUCTION

In the spring of 2007 Okanagan College (the College), led by the Board of Governors, began discussing the quantification of results arising from its strategic priorities and planning. At that time, the Director of Okanagan College International Education (OCIE) asked for a management report that would contribute to the development of a system of metrics and measurement in support of future growth and innovation in OCIE specifically, and to inform Okanagan College generally. Currently, the Executive under the direction of the Board, is seeking a more focused approach to inform daily efforts, and is in the process of identifying college-wide measurable objectives to inform annual unit plans and operating budgets (Inside Okanagan College, Special Edition, Feb 22, 2008).

The Ministry of Advanced Education (Ministry) is providing leadership in the post-secondary sector in performance-related activity through adherence to the performance management framework. A performance measurement system is situated in this annual cycle of strategic planning that includes development of programs/services, implementation, performance measurement, evaluation and accountability reporting. Establishing this system of review and renewal for OCIE is based on practical information and realistic expectations in support of the current activity towards College-wide objectives and a performance culture.

This report aims to provide a performance measurement (PM) system to meet the needs of OCIE and to contribute to the growth of a performance culture at the College. It places the performance measurement system for OCIE in the greater Ministry and institutional context, and provides a complementary system that will contribute to annual reporting processes. The principles of the “Learning Organization” were adopted as a foundation for the institution, guiding the strategic plan (Leadership Team, 2007), and informing all unit plans within the organization (Okanagan College, “Designing Our Future: Strategic Plan 2006-2011”). Learning organizations are defined as:

*“...organizations where people continually expand their capacity to create the results they truly desire, where new and expansive patterns of thinking are nurtured, where collective aspiration is set free, and where people are continually learning to see the whole together.” (Senge, cited in Okanagan College Strategic Plan, 2006, p8)*

The majority of the report is dedicated to the development of a “Logic Model” for OCIE which, as a descriptive and prescriptive model, seeks to explain what the department does, and further, logically presents what OCIE is intending to accomplish (McDavid et al, 2006). As a tool for the department, the logic model is useful in describing the department and its expected performance, and in the process of its development, helps to identify critical measurement areas. A description of the logic model leads to a discussion of the department’s key components and identifies key measures which, through monitoring of the linkages and regular reporting, are meant to provide the department with meaningful and relevant information that will enhance the quality of programs and services provided by OCIE.

It is suggested that the development and use of performance measures as a tool for strategic planning will facilitate the creation of information in support of the learning organization at

Okanagan College. Measures of individual and departmental learning in the design of the PM system are one part of this support, while structures and processes to assist in the implementation have been recommended based on the principles of the learning organization. Through both the design and implementation of a measurement system, along with leadership support for the formative nature of performance measurement, there are opportunities to inform a learning culture at the individual, departmental and organizational level.

The presentation for this advanced management report has been organized in the following way. First, a background of the post-secondary governance environment in which OCIE is operating will be briefly discussed, including performance-related activities in the Ministry of Advanced Education, subsequent efforts at the College, and current processes in the International Education department. The methodology for the report will be described next, followed by a summary of the literature review that informed the performance measurement system for OCIE. The PM system for OCIE, based on the development of the departmental logic model, is described and discussed in the findings and analysis section, followed by the conclusion and suggested next steps. Including the learning organization in the literature review and in the design of the logic model contributed to the development of a PM system for OCIE by situating its development in this organizational environment.

## 2.0 BACKGROUND

The organizational context in which OCIE operates is an important consideration in the development of a departmental performance measurement system. The following section will provide information on the activities surrounding performance measurement at the Ministry of Advanced Education, as well as an introduction and organizational profile of Okanagan College and Okanagan College International Education. Implementing a PM system for OCIE requires an understanding of the reporting (accountability) chain that is mutually interdependent at each level, and that recognizes the purpose and intent of performance information as requested by the government to inform the post-secondary education sector in BC (Appendix A).

### 2.1 Ministry of Advanced Education Accountability Framework

The Ministry of Advanced Education (the Ministry) is leading the post-secondary education system in British Columbia in the use of performance measurement through its Accountability Framework. The Ministry provides leadership and direction, establishes policy, and provides funding to the post-secondary system with the mission to deliver “excellent, accessible post-secondary education for learners” (2007/08-2009/10 Service Plan, p.22). In recognition of the autonomy of the public post-secondary institutions in British Columbia, the Ministry has introduced *An Accountability Framework for British Columbia’s Public Post-Secondary Institutions* (Framework), with the intent to protect the independence of the institutions while addressing the post-secondary priorities of the government.

The Framework, introduced by the Ministry in 2003, provides a set of planning and reporting processes for BC’s public post-secondary institutions. Its purpose is to enhance system-level management in several ways by promoting greater system-wide institutional coherence, coordinating annual institutional planning to align with provincial goals and objectives, developing performance measures, and establishing expected outcomes (AVED, 2003). The key features of the accountability framework include the use of performance measures, annual reports on system-level and institutional activities and results, and an emphasis on outcomes.

The Ministry has currently identified two strategic goals for post-secondary education in BC, of which *one strategic goal* applies to Colleges in the province:

*“Excellent public and private post-secondary education that meets the needs and aspirations of British Columbians.”*  
(2007/08-2009/10 Service Plan, p5)

As outlined in the Ministry’s *Service Plan Summary 2007-08-2009/10*, the objectives associated to this strategic goal include: *capacity*, ensuring adequate student spaces for current and future needs; *access*, ensuring equitable and affordable access to public post-secondary education; *efficiency*, delivering education programs in a timely and efficient manner; *quality*, meeting the needs of students, employers and citizens; and *relevance*, indicating the system’s ability to remain relevant and responsive to the needs of the students and the province with the appropriate scope and breadth of education.

The performance measures associated with these goals and objectives are reviewed and recommended by the Accountability Advisory Committee, the institutions' steering committee for the Accountability Framework (AF). Through this committee, the Ministry consults with representatives from public institutions to ensure the measures are reasonable, while still reflecting the government's priorities (2007/08-2009/10 Service Plan). How to measure the objectives is the responsibility of the AF Performance Measures Working Group, comprised of institutional representatives including Okanagan College's Institutional Research, whose work is guided by the *"Standards Manual for Accountability Framework Performance Measures."* A Ministry research group has access to data from two different systems, including performance data from the Colleges submitted to the Central Data Warehouse (CDW), and data pulled from *The University President's Council of BC (TUPC)*. This provides AVED with two sources in which to review the measures for reasonable results, and to deem them credible and reliable.

In February 2007, the *"Post-Secondary Education Accountability Framework Review"* (AVED, 2007), was completed with several key recommendations involving improvements to performance measures and their application. Of interest to all institutions is the importance of external reviews, even at the Ministry level, to ensure the measures chosen are the right ones, and are in fact measuring what they intend. The review recommends among others, that the Ministry re-define the key objectives or criteria, clarify the purpose of the Framework, move away from competitive and relative measures, and introduce measures related to specific policy priorities, including international students. The review also suggests that measures are redefined to account for "university transfer programs, short duration courses or post-employment programs" (AVED, 2007, p.30). These recommendations would impact OC and OCIE directly and will require close monitoring of the Ministry's performance planning in the near future.

As with all jurisdictions in Canada, the Ministry does not incorporate performance measures into the budgeting and funding process *at this time*, and only Alberta has a semblance of financial incentive through a separate "pot of money" to reward performance (*"Roles and Mandates Policy Framework, Ministry of Advanced Education and Technology, 2007*). Continued support of the performance management cycle, and the use of performance measures in communicating with internal and external audiences, summarizes the Ministry's current focus. The performance cycle at the provincial government level as a communicative and informative process to explain goals, issues, challenges and the relationships between, is designed to help inform institutions, not to penalize (AVED, 2007).

The Post-Secondary Education Accountability Framework Review (2007) recommends that the focus for the Ministry in the foreseeable future be on performance management, not performance budgeting, and that the accountability letters distributed to institutions annually continue to be presented as a "block grant" for use in operations and capital. With an annual budget of over two billion dollars for post-secondary education, the Ministry does however influence the College and its strategic plans by stating objectives in the accountability framework that reflect the government's priorities. These objectives are the accountability link to the government and therefore will inform the strategic planning process of the College.

## 2.2 Okanagan College

Okanagan College serves the Okanagan-Shuswap region of British Columbia with an enrollment of just over six thousand students studying at the four regional campuses and in surrounding community learning centres. Since beginning operations on July 01, 2005 as one of two institutions formed after the dissolution of Okanagan University College, Okanagan College has been actively building on its mission, vision and values. These efforts have been well supported by the Board, Executive, faculty, staff, students and the communities in which the College serves. Okanagan College, although reintroduced in 2005, has a rich forty year history as an educational institution in this region of British Columbia (Designing Our Future, 2006).

The policies that guide Okanagan College as an institution include legislation, primarily the *College and Institute Act*, and Governance, through the Board of Governors and the Education Council who act in accordance with the Act. The *Program and Services Standards Policy (PSSP)*, as part of Board governance, begins with a policy statement that firmly establishes support of the mission statement “through the provision of effective, efficient and accessible programs and services” and the delivery by “competent, appropriately resourced staff” (Okanagan College, 2007. p.1). The Board has clearly indicated a desire to improve reporting on programs and services and in response, activity surrounding performance measures has increased at the Executive level. All College departments, including international education, will require a process that will support and create information relevant to the governance of the College.

With the key to the success of performance measurement being based on a clear understanding of goals and objectives, including those related to public values and interests while allowing for flexibility to respond to changing strategic priorities (Perrin et al, 2007), Okanagan College is already in a process that will lead to greater use of performance information. The mission statement revealed in the strategic plan for Okanagan College, “Designing Our Future”, states,

***“Okanagan College transforms lives and communities. We educate, train and support our students to excel in the workplace, to succeed in further education, and to become lifelong learners.”(p. 1)***

Similar to provincial planning, the College’s organizational goals and plans are encompassed in its Governance structure. When the institution's strategic plan was first introduced, it reflected a strong commitment to becoming a learning organization and to guiding the development of the College in eight key directions. Student success has since shifted to being the core direction, while the learning organization has become the foundational principle in the strategic plan. (Okanagan College Leadership Team recommendations, 2007 – see Appendix B). Although unique to the department, the goals and plans for International Education are developed in support of the overall organizational goals.

## 2.3 Okanagan College International Education

International Education at Okanagan College has offered English language programs and related services to international students for over twenty years, first as Okanagan College, and continuing with Okanagan University College (OUC) from 1994-2005. When established as the new Okanagan College on July 1, 2005, Okanagan College International Education (OCIE) operated regularly staffed international offices at the Vernon and Kelowna campuses, with full time English-as-a-Second-Language (ESL) programs at each campus. There are currently thirteen regular administrative and support staff in the Kelowna office and five regular administrative and support positions in Vernon, however, at various times during the year, all campuses including Salmon Arm and Penticton will employ contract staff to work with short-term contract training or study tour programs.

Okanagan College International Education currently relies on funding from the College on a cost recovery basis by offering programs and services to international students and clients. Currently, recruitment and retention of international students and groups is a primary activity, with programs and services offered in their support, including:

- Services
  - Student Settlement – orientation; homestay; medical/dental
  - Student Life - recreational/cultural activities; student support
  - Educational and Immigration Advising
  - Promotional Media
- Programs
  - English as a Second Language (ESL)
    - individual – academic and conversational
    - group - study tours
  - Peer Mentor
  - Conversation Partner
  - Study Abroad

OCIE will benefit from a process that will communicate to both the department and OC institutionally, key information regarding new and existing programs and services, their connection to the institution, and their overall strategic objectives. OC key directions that are directly relevant to OCIE activities include the learning organization, student's success, employee development, four regions of equal value, quality in teaching and learning, promoting and recruiting, and cultural and social diversity. It will be important to consider these key directions in the design of a performance measurement system for OCIE.

OCIE has continued to expand its programs and services, and has just recently been asked to assume a broader area of responsibility - a leadership role in internationalization efforts for the four regional campuses that serve the Okanagan-Shuswap region of British Columbia. Internationalization is a strategic process that involves the integration of an international and intercultural dimension to teaching and learning, and to OC community functions (Tunney et al, 2007). Providing students with intercultural skills pedagogically, along with international opportunities abroad, and a culturally diverse learning environment, is a cornerstone of the

College commitment to supporting all learners in becoming global citizens. The commitment to internationalization will involve the development of new services and programs towards the long-term outcome of intercultural campuses that will continue to attract both domestic and international students to Okanagan College.

Currently, reporting on OCIE programs, services, and activities, has been achieved through the submission of the annual budget and unit plan to the Executive of Okanagan College. The Director completes these documents with input from senior OCIE administrators in support of the planning process at the institutional level. Internal processes in the department that have previously helped guide program development and international student services have included gap analysis, student surveys, focus groups and anecdotal evidence. Summaries and information from these measurement activities are often distributed during meetings with staff, while some raw results data is also available in the international education files.

The ESL program, which has very recently been transferred to International Programs from the Arts and Foundational programs portfolio, has been excluded from the scope of this report as it is subject to an external evaluation from the Canadian Learning Council (CLC). The remaining international programs and related services, along with the newest role for internationalization, will be considered the foundation of the performance measurement system for OCIE.

### 3.0 METHODOLOGY

Designing a performance measurement system for International Education involved a detailed review of the strategic plans and organizational objectives of the Ministry of Advanced Education and those of Okanagan College. With the College key directions and the principle of the learning organization as a foundation, the programs and services provided by International Education were linked to the strategic directions of the College. Situating the work of the department in relation to the goals of the organization helps conceptually to understand the informational needs of OCIE and the College (see Appendix C).

At the same time, a comprehensive literature review was undertaken on performance measurement systems, and the concept of the learning organization. This review included the successes and challenges in designing and implementing performance measurement systems, specifically those related to the public sector. It included the history, application, successes and challenges with performance measurement systems, and highlighted the prescriptive or technical elements of the system, as well as the mutually reinforcing organizational and cultural elements. The theory driven or cognitive element of performance measurement was both informed by, and informed, the review of the learning organization.

This report was also informed by research into ongoing evaluative processes in the Canadian international education sector, which range from internal audits to address international-related program procedures, to reliance on primarily statistical metrics, to an in-depth organizational assessment process with the *Internationalization Quality Review Process* (IQRP). Regardless of the level of engagement in program/service reviews and measurement activity, this research highlighted the challenges, both technically and culturally, facing international education professionals in measuring the service-oriented work that is encompassed in their field.

A performance measurement system for International Education has been introduced in this report through the development of a departmental logic model and identification of the key variables that are fundamental to the provision of international programs and services at OCIE. Measures developed for the variables include a mix of quantitative and qualitative measures to be reviewed and updated periodically, with the use of current tools for data collection incorporated into the PM system that can be refined and updated as capacity increases (Wholey, 1999). Processes to facilitate the generation and sharing of information, encourage innovation in programs and services through open channels of communication, and provide continual, consistent and connected information, will be enhanced by the involvement of all OCIE staff in the PM process in keeping with the learning organization principles.

The conclusion and recommendations for OCIE to incorporate a performance measurement system in support of key objectives is based on recognition of both the technical and organizational context in which the system will be implemented. The logic model, illustrating how resources for a program are converted into activities and into intended results, will require a collaborative review to ensure it is adequately telling OCIE's 'performance story.' As the model has been based on current practices at OCIE, minimal resources with a strong individual and departmental commitment have been the primary consideration in support of successful implementation.

## 4.0 LITERATURE REVIEW

The purpose of the literature review is to provide management at Okanagan College with a summary of research to inform and support the design and implementation a performance measurement system for Okanagan College International Education. To begin, a clear distinction between performance terminologies, mainly performance management, performance management cycle, performance measurement and performance measures will be made. The discussion then leads to a summary of the main benefits of performance measurement systems, and how the technical aspects of this process can benefit from increased evaluative support and the complementary process of program evaluation that is often overlooked. The use of performance measurement in the public sector is then reviewed, including the challenges of identifying the right measures to measure performance. The final part of the literature review is dedicated to research on the cultural aspects of the performance measurement process. It will provide research in support of OCIE efforts by placing performance measurement in the context of the learning organization.

### 4.1 Performance: Management, Cycle, Measurement, Measures?

Similar to the organizational context in which public post-secondary institutions operate, for example, OCIE within OC and the Ministry, a performance measurement system operates within a greater management context that generally includes:

- a theory of *Performance(-based) Management*,
- model of planning and actions in the *Performance Management Cycle*,
- systems, including *Performance Measurement, Evaluation* within this cycle, and
- results (outputs and outcomes) using information from *Performance Measures*.

*Performance management* is the latest system to evolve from academic, organizational, and management literature, which has been providing research since the 1960's on management and accountability approaches. Since this time, the focus on "accountability" has been shifting from an emphasis on program process to program results through management reforms including Managing by Objectives (MBO), Program Planning and Budgeting Systems (PPBS) or Management by Results (MBR) (Perrin, 1993). Performance management is a planning and managerial tool that combines the private and public planning process with management theories in support of quality assurance, customer satisfaction and continuous improvement.

Wholey (1999) defines performance management as the "purposeful use of resources and information to achieve and demonstrate measurable progress toward goals" (p.288). McDavid & Hawthorn (2006) refer to a management practice that relies on "evidence" to connect an organization's strategic priority to outcomes, and to assist in current and future decision-making. *Evaluation* as part of a performance management process, through the consistent collection and monitoring of reliable measures, can analyze the results or outcomes on the basis of why and how those results occurred (Blalock, 1999). This allows performance to be focused not only on the attainment of goals, but also considers the complex interrelationships between goal

achievement and the process, culture, values and environment inherent in performance (Wholey, 1999).

As capacity for performance management systems and the use of performance measures increases in the public sector, there has been an evolution towards the integration of management and evaluation, or practice and theory, supported in recent research and literature (Blalock, 1999; Perrin, 1998; Chatterji & Levine, 2006). Reflecting this, in the Canadian public sector, accountability has not shifted completely away from process to results as indicated by the current definition of “accountability” provided by the Treasury Board of Canada (2008),

*“The obligation to demonstrate and take responsibility  
both for the means used,  
and the results achieved  
in light of agreed expectations”*

The *performance management cycle* provides a framework for organizational planning that encourages both the development of clear goals and objectives, along with strategies for achieving these goals. McDavid et al (2006) adapted a model of the five stages in the cycle from the Auditor General of British Columbia and Deputy Ministers’ Council from April 1996. (Appendix D). The cycle includes:

1. Clear Objectives – strategic planning; policy development; sectoral goals
2. Effective Strategies – business planning; program design; policy development
3. Aligned Management Systems – program-level budget development; information systems; human resources; administrative and financial controls
4. Performance Measurement and Reporting – performance agreements; performance measurement; program evaluation; annual reports; sectoral reports
5. Real Consequences – funding decisions; delivery alternatives; program adjustment

The cycle begins and ends with the formulation of clear objectives for the organization, establishing an ongoing accountability link for the various stages, and the programs, policies and services. The second and third stage, strategies and aligned systems, includes the design and implementation of programs and services, followed by performance measurement and reporting, including evaluation. The cycle is mutually reinforcing, and, with processes and systems that are sufficient to provide performance information, is intended to ensure that consequences in stage five, lead back into the ongoing modification of goals and objectives through strategic planning at various organizational levels (Blalock, 1999; McDavid et al 2006; Wholey, 1999).

Performance Management is advocated in the public sector as a “steering instrument”, while *performance measurement* (PM) has been used as an accountability tool within this cycle (Greiling, 2006). As one management tool in the performance management cycle, PM systems provide information on *measurable expectations* that contribute to an organizations strategy (Okanagan College, Performance Management System, 2007). Performance measurement as a system therefore involves both the *design* of quantitative and qualitative measures of program/service results, and *implementation* of a process that must consider the organizational and cultural environment in which the performance measurement system will operate (McDavid et al, 2006).

**Performance measures** are the quantitative and qualitative measures of program/service or organizational results, and, although represented in the following categories, may be referred to in performance literature in a variety of different ways (Pollanen 2005; Government of Minnesota, MAD, accessed 2008; Rutgers University, NCPP):

1. **input measures** – quantify resources, financial or human, used in providing a service or program
2. **output/workload measures** – indicate amount of programs/services provided, or work performed and amount of services received
3. **process measures/efficiency** – reflect the relationship between inputs and outputs including service efforts, accomplishments and explanatory information
4. **cost-effectiveness/efficiency** – cost per unit of output or outcome; the ratio of the quantity of the service provided, to the cost, in dollars or labor, required to produce the service
5. **outcome measures (effectiveness)** – the extent to which a program or service has achieved its goals, met needs or commonly accepted professional standards.

Performance management is contextual in both theory and use based on the operational environment in which it is developed (Modell, 2004; Chatterji & Levine, 2006; Bourne, Mills, Wilcox, Neely, Platts, 2000; Johnsen, 2005). As “performance” is a relative, socially constructed concept, it is subject to varying interpretations and requires identification of various dimensions of quality that act as indicators of ‘success’ or ‘satisfaction.’ For this reason, it is imperative that ‘performance’ is assessed with respect to the objectives and the strategy of the organization to ensure that appropriate measures are identified, and their use is meaningful (Pollanen, 2005; Thomas, 2006).

## 4.2 Performance Measurement Systems

PM systems can have multiple purposes in an organization, and therefore clarifying the shared perception of their use, especially in the public sector, must be a key consideration when a PM system is being designed and implemented. Thomas (2006) has provided a list of eleven distinct and possible uses for PM systems, offering an array of options and plenty of opportunity for divergent interests in their development (Appendix E). Whether focused on accountability for results, process, or both, being clear about the intended use of a performance measurement system will lead to better use of resources in the development and maintenance of a PM system and to performance information that is relevant and focused (Thomas, 2006; McDavid, 2006).

The performance management cycle (Appendix D) has modeled performance measurement as part of a managerial tool for planning, monitoring and tracking of outcomes. The benefits inherent in designing a PM system include clarifying organizational goals, directions, expectations, and communicating the priorities of the organization to key stakeholders in the process. Also beneficial is the systematic, quantifiable, and regular collection of performance data that can be easily communicated to stakeholders (Divorski et al, 2000; Bruijn, 2002). Transparency and accountability are highly valued in both the private and public sector, and

performance measurement is increasingly regarded as a system to strengthen accountability for results (Thomas, 2006).

Performance measurement itself however does not bring about better performance. This is the opinion of a growing number of researchers who have determined it is often the hidden value of performance measurement, when the process is structured to generate ideas, innovation, creativity and improvements that offers the most value in a pm system (Halachmi, 2002; Bruijn, 2002; Greiling, 2006). Organizational systems and management that is structured to involve stakeholders in the development of pm systems allows for greater transparency, learning and assessment in support of quality improvement. Creating communicative processes and encouraging dialogue, ongoing feedback, and reflection enhances the use of existing resources, and is referred to by Mintzberg (1994) as “strategic thinking” employing the use of “soft data” (Perrin, 1999, Halachmi, 2002). A performance measurement system therefore can lead to better resource utilization in an organizational context where value is equally sought through a mix of organic and mechanistic processes (Blalock, 1999; Townley et al., 2003; Vakkuri et al., 2006; Adcroft et al., 2005; Halachmi, 2002).

Performance measurement systems originally designed for short-term performance to report what an organization is doing, are slowly evolving towards more complex systems for reliable and valid information on ‘why’ and ‘how’. Cost-based metrics, or “lag measures” reporting what has happened are commonly used to measure outputs in pm systems (Anderson et al, 2004; Adcroft et al, 2005; Halachmi, 2002; Perrin, 1998). If, however, there is consistent measurement continuing over time, and it is connected to the intended outcomes, the data collected can be used to explore causality among measures and outcomes (Divorski et al, 2000; Newcomer et al, 2001). Movement beyond input/output measures, towards measures of process and outcome to determine performance are indications of the growing complexity of pm systems and the need for greater evaluative capacity (Perrin, 1999; Divorski et al, 2000; Blalock, 1999).

To attribute outcomes to the observed results therefore requires a clear distinction between recording performance data, and actually analyzing, interpreting and reporting performance information accurately to account for both the “means used and the results achieved” (Government of Canada, RBM Lexicon; Perrin, 1999; McDavid et al, 2006; Bruijn, 2002). The latter requires the complementary process of collecting information about how or why the results occurred. Assessing the complex relationship between the stated objectives and actual outcomes (Knight, OECD EOTU project 2002), is dependent on the use of measures that are both data-driven and theory-driven, and, require greater evaluative analysis (Johnsen, 2005).

A greater commitment to building evaluative capacity for determining quality improvements would support the increased use of “lead measures” that represents continuous learning and the process of change. Traditional use of low-level input and output measures, which are primarily numeric, tend not to capture quality factors (Blasi, 2002; Modell, 2004; Perrin, 1998; Pollanen, 2005). Creating value over the long-term does not have to sacrifice short-term performance; rather complement with process measures that represent strategic thinking for medium and long-term outcomes. This use of forward thinking, upstream metrics, provides insight into the actual processes involved, including, increasingly, organizational strategy and learning requirements (Anderson, 2004).

### 4.3 Challenges in Measuring Performance

There is some ambiguity about the value in using performance measurement systems as a planning and reporting tool in the public sector. These concerns are raised based on the broader, multiple strategic directions for action in the public sector than found in the private sector, and the prominent use of efficiency-type, often financial, measures that fail to capture the complexity of programs/services (Modell, 2004; Chatterji, 2006; Johnson, 2005; Dixit, 1999; Kouzmin et al, 1999). Combined with global economic change, reductions in social program funding, and decentralization, the growth of performance management in the 1990's as a way to reclaim some level of control is contributing to a changing context for social program accountability (Bonar-Blalock, 1999).

Performance measurement systems are designed with the intention of providing accountability information to external stakeholders with regards to results/outcomes; and to all stakeholders, internal and external, with information that can lead to improved performance (Scheirer & Newcomer, 2001). As Halachmi (2002) observes, performance information is a necessary condition for improving performance, but it is not sufficient to actually bring it about. Improved performance often requires innovation and experimentation, or *strategic thinking*, while accountability information is traditionally related to a model that is developed from *strategic planning*. For this reason, there has to be a commitment from those who implement and use the services and programs, and those who provide the resources, to design and implement the pm system collaboratively with shared objectives and understanding of what is being measured and why. This involves agreement that the regular study and comparison of changes over time and the relationship between the activities and expected outcomes is both desired and possible (Halachmi, 2002).

The main objective of a PM system is to gauge whether or not objectives are being met, and the key value of the system is often expressed as that of an informational tool related to planning, reporting and identification of key social objectives (Gagne, 2007). The main objectives of measurement activity in a PM system are to (Perrin, 1998):

- monitor how well an organization is doing
  - identify where the organization is with respect to meeting the objectives set
- question the assumptions and the strategy itself
  - question where human and financial resources should be directed to achieve objectives
- identify areas for further management attention
  - assist in strategic planning; guide programs, policies, services
  - help provide a narrative to both internal and external stakeholders

A performance measurement system can make an important contribution to an organization if the set of key performance measures to monitor progress in achieving objectives, and to determine 'performance,' are both reliable and valid (Gagne, 2007; Perrin, 1998). To be valid, the measures must completely and adequately reflect the objectives being measured. To be reliable, measures must also be consistent and able to provide the same results over repeated

measurement. To ensure reliability therefore often requires training and experience in research methods and design to ensure the right measures are chosen.

Also of concern in measuring performance is the nature of the environment and the full range of issues and production processes within which the measures exist (Greiling, 2006; Townley, 2003; Bruijn, 2002; Perrin, 1998). In the post-secondary education sector, there is limited visibility of the production process, resulting in outputs and outcomes that are difficult to observe (Gagne, 2007, Perrin, 1998). Reporting the data is subject to varying interpretations and often lacks comparability across different sites, resulting in the neglect of key elements in an organization that may influence the results. Ensuring the validity of measures involves both a choice of measures that reflect the construct of interest and the ability to attribute the observed outcomes to the program or service.

Emphasizing the wrong activities by focusing on meaningless and irrelevant measures can also result in a shift of resources away from production, and even in the long term, increased cost (Gagne, 2007; Perrin, 1998). The challenge is to see PM less as a conceptual and precise analysis, and more about interaction and consensus on what to measure, how, and with what consequences (Thomas, 2006). This involves identify the limitations and seeking clarification on what contributions PM systems do offer.

Together, some common limitations that are listed in connection with measuring performance by Gagne (2007), Perrin (1998), and Halachmi (2002) are as follows:

- do not provide information on value for money
- are not to be used in isolation for meaningful accountability, or to determine resource allocation
- is not a suitable method for evaluating performance in the sense of measuring efficiency and effectiveness (causal inferences)

Researchers however, do agree that there are strategies for effective use of performance measures and ways to minimize inappropriate use, especially through a broader approach to accountability and performance measurement that focuses on innovation and learning (Halachmi, 2002; Perrin, 1998; Thomas, 2006; Modell, 2004):

- ensure performance measures are at the right level through the development of a logic model, and through multiple indicators that capture process, outputs, outcomes
- actively involve stakeholders
  - developing, reviewing, revising, updating measures frequently
  - interpreting findings and identifying implications
  - identifying performance information useful to those involved in the programs and service
- use as one component of a comprehensive evaluation strategy for:
  - planning and monitoring
  - balance of quantitative data from measures, with qualitative forms of information
  - used strategically for measurable activities

Perrin (1998) believes that performance management and measurement as a new system for results and accountability is not yet living up to its claim, however, through expertise, resources and increased capacity, the strategies noted above will minimize inappropriate use. Previous management reforms, which focused narrowly on results or outcomes, can be viewed as learning opportunities, which, through their use and experiences, can better inform current attempts in performance management (Perrin, 1998; Modell, 2004). The need to reconcile the false dichotomies that exist between management & measurement, strategic thinking & strategic planning, reasoned justification & rationalization, are part of the debate surrounding performance management. Advocates for a broader perspective encompassing forward-focused strategic thinking, leadership, innovation and learning, skills and infrastructure, consider the learning organization culture one way to encourage internal, realistic measures and action in a performance measurement system with a joint interpretation of organizational reality (Mintzberg 1996; Perrin, 1998; Thomas, 2006; Johnson, 2005; Greiling, 2006; Townley et al., 2003).

#### **4.4 Performance in a Learning Organization**

Organizational renewal is the current focus of management practices including those related to performance management, and is also the basis for an organizational commitment to the principles of the Learning Organization. The complementary nature of organizational development and management practices in facilitating this renewal include patterns of behaviour related to priority of goals, values and objectives; social aspects of cooperative learning; structures of organic character to support learning at all levels; and operational aspects that look both to strategic planning and thinking (BFerguson-Amores, 2005).

As in performance measurement systems, there are distinctions to be made between the technical and social variants of a Learning Organization (Easterby-Smith and Araujo 1999: 8). The technical variant has looked to interventions based on measures such as the 'learning curve' or dimensions of a learning culture that are familiar in the design of appropriate measures in a PM system. There is a tendency in these approaches to focus on outcomes rather than the processes of learning. The social view of the learning organization looks to interaction and process, mirroring the movement among researchers of performance measurement, as the orientation that has come to dominate the popular literature.

According to Sandra Kerka (1995) most conceptualizations of the learning organizations seem to work on the assumption that "learning is valuable, continuous, and most effective when shared and that every experience is an opportunity to learn." Just as measuring performance is recommended at three levels, so too is the potential for learning advocated at the individual, team and organizational levels (Yang, 2003). The following characteristics of a learning organization appear in some form in the more popular conceptions as organizations that:

- Provide continuous learning opportunities.
- Use learning to reach their goals.
- Link individual performance with organizational performance.
- Foster inquiry and dialogue, making it safe for people to share openly and take risks.
- Embrace creative tension as a source of energy and renewal.

- Are continuously aware of and interact with their environment.

A common refrain in support of learning organization principles is that they create the potential for success, and enhance capacity for learning and change (Watkins, 2005). Measurement and evaluation research has repeatedly found that equally valuable to the technical aspect of the systems, the measurement process requires the right organizational culture. The learning organization also requires the development of a learning environment to facilitate the process and support the principles that lead to organizational learning (Appendix F). The challenge for a PM system in a learning organization is increasingly the ability to show conceptually effective and innovative processes that will further develop and promote performance measures as a valuable tool, and not lead instead to resistance and distortion (Johnsen, 2005).

Adherence to the learning organization principles is a process that, over time, will change an organizational culture through structures and systems that support continuous learning. Just as improving performance is an important justification for PM, the process itself for the learning organization is important if it increases engagement and reflection leading to value-added activities and input. Facilitating communicative structures through the work cycle, including discussion, learning, and critical reflection, can lead to a greater chance for improved performance (Halachmi, 2002; Yang, 2003; Ferguson-Amores et al, 2005). This will rely on managerial and organizational skills in managing a cooperative atmosphere that harmonizes this kind of cooperation based on a common commitment to learning (Kouzes et al, 1999; Halachmi, 2002; Anderson, 2004).

Modell (2004) suggests that a multi-dimensional approach to performance measurement, by embedding PM systems in organizations at the conceptual, strategic level, can offer a new shared perception of performance measurement in the twenty-first century. Performance measurement is a monitoring tool for management that contributes information for strategic planning, monitoring and operational efficiency. Performance evaluation as a research tool contributes information about causal processes involved and checks the validity of short-term performance monitoring strategies in support of outcomes. The Learning Organization creates the climate of organizational learning that facilitates structures to encourage the iterative processes and sharing of information that has been shown to contribute to improved performance. Integration of these processes would suggest that what were once differing purposes, perspectives, priorities and expertise may in fact complement one another to support individual, group and organizations in achieving their shared goals (Blalock, 1999; Thomas, 2006; Ferguson-Amores, 2005).

## 5.0 FINDINGS and ANALYSIS

This section will summarize the PM system for OCIE in its organizational context, and describe the logic modeling process that has informed the development of a logic model for OCIE (Figure 5.2). The components, outputs and outcomes identified in the logic model represent the current objectives and activities of the department, and are presented here for departmental review. The logic model and its components offer OCIE the foundation for measuring and recording key performance data in a consistent manner for further analysis, interpretation and reporting of performance information and to inform future planning through a process of review and renewal.

The simplified model of a Performance Management Cycle offered by McDavid and Hawthorn (2006) is an accepted model to guide effective performance management and strategic planning at all levels in the institution and provides the opportunity to make a connection between the individual, department and institution (Appendix G). As the programs and services provided by OCIE directly involve 5 of the 7 key directions for Okanagan College, the following measurement system is compatible with, and supports the strategies of, both the department and the institution, while also providing individuals at OCIE with an opportunity to provide feedback, and inform internal and external stakeholders of their continuing efforts and contribution towards the institutional objectives.

### 5.1 A Performance Measurement System for Okanagan College International Education

The design and implementation of a performance measurement system requires leadership to initiate and maintain the required feedback relationship between these two elements, while being conscious of the environment in which the identified measures exist. For OCIE to have a performance measurement system that will continue over time, McDavid and Hawthorn (2006) suggest it is necessary to discuss these two elements in greater depth (Appendix H):

1. **Design:** *technical* aspects which include research design and attribution issues that are most often the focus of literature and learning,
2. **Implementation:** *organizational/cultural* aspects which are related to the process and are critical for the successful implementation of a pm system.

A performance measurement system design for OCIE will include the identification, measurement and recording of a selected set of performance measures that inform the objectives of OCIE and Okanagan College (OC). Understanding what the system can and cannot do is fundamental in designing a pm system, and the construction of an organizational logic model to conceptually and succinctly describe the organization helps to facilitate the development of appropriate measures that will contribute meaningful, reliable and valid information. (McDavid, 2007).

Choosing reliable and valid performance measures creates information in support of the department's strategic objectives, which are all closely aligned with the overall institution. To be

reliable, a measure must be able to provide the same answer over again, even when using different methods of measurement. Validity of measures is often the most challenging as to be a valid measure it must ensure the information itself is valid and that it measures what it claims to be measuring. A PM system should include measures that provide useful technical information in the planning and delivery of existing, new and quality programs and services. It should include processes and structures to support the generation and adaptation of quality information that can be compared over time. Building a successful PM system involves constant communication and engagement of staff in the learning process throughout the design and implementation of the system.

The organizational and cultural aspects of the process have been viewed as synonymous with the learning culture that OCIE supports through the principles of the learning organization. While there is commitment from the Director for the use of performance measures, effective implementation of the PM system will require identifying OCIE leaders to manage the implementation process, clearly communicating its objectives, and clarifying the expectations and uses of performance information and reporting in the department. Engaging all the staff in the review of the logic model and formalizing a cohesive process that will include the strategic planning, data gathering, interpreting and reporting of selected performance measures on a consistent basis will strengthen the performance measurement system for OCIE. This will require a level of resource commitment that must be situated within the context of the larger departmental and organizational structure.

## **5.2 Logic Model**

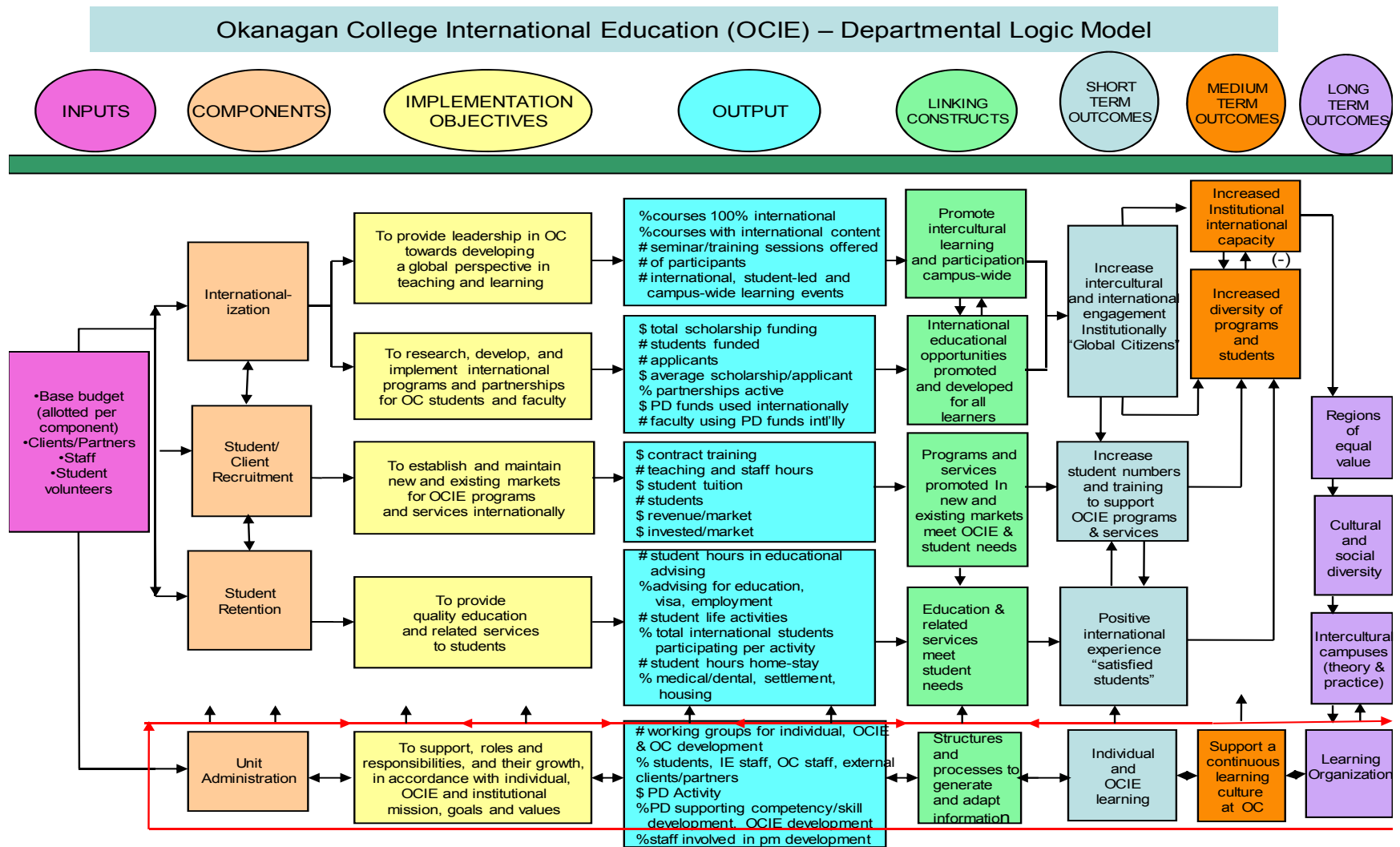
The organizational logic model developed for International Education is both a descriptive and prescriptive model meant to explain what the organization does, and further, logically presents what OCIE is intending to accomplish (McDavid et al, 2006). The development of a program/service review and renewal for Okanagan College International Education (OCIE) has been requested by the Vice President of Integrated Planning and Services, an indication of the changing needs of the Executive, the Board of Governors, and their accountability relationship to the public and the Ministry of Advanced Education. In respect of these requirements and following the lead of the Ministry, which is currently using performance information as a formative tool (AVED 2008), a performance measurement system for OCIE will initially focus on a new PM system with learning structures to support a performance culture that is focused on consistency, clarity and connectedness for the department and the institution.

In an environment where the focus on outcomes is increasingly prevalent, a logic model is meant to theoretically illustrate the organization's expected performance. Using a logic model, according to McLaughlin and Jordan (1999), provides the following benefits:

- Builds a common understanding of the organization and expectations for resources and results through a communicative process that encourages sharing ideas, identifying assumptions and building a shared vision.
- Identifies key constructs that are critical to achieving the outcomes, and in review, those that need to be adjusted, reviewed, updated, or lack relevancy.
- Communicates the department's role in the overall organization by linking to shared outcomes.

- Facilitates the development of performance measures of the organizations activities and outcomes (McDavid et al, 2006), improving data collection and usefulness in evaluative activities.

Figure 5.2 Logic Model



As illustrated in the model, the relationship between resources and outcomes is a series of linkages which cannot happen without the commitment of people (Mintzberg, 1996). With the College commitment to continuous improvement and quality of programs and services, a key benefit of the logic model as a management tool is the opportunity to facilitate a collaborative effort to answer the questions, “What are we trying to achieve? How can we determine our effectiveness? And, “How are we doing?” (McLaughlin et al. 1999, p.65).

Although there are many variations, descriptions and examples of logic models, the one chosen for OCIE is a framework that includes six main classifications as listed by McDavid et al., 2006:

- **Inputs** - resources required for OCIE to operate
- **Components** - “clusters of activities” within the department
- **Implementation objectives** - action that defines the main activities
- **Outputs** - work that is done at OCIE
- **Linking constructs** - transition between the work done and the intended outcomes
- **Outcomes** - intended results linked to OCIE objectives (short, medium and/or long-term)

The expected causal relationships are represented in a linear manner from left to right, as shown by the arrows that link each section.

In the logic model, the **inputs** that support international education and their activities consist of base budgets allocated to components of OCIE through the budgeting process, clients/partnerships, staff, and volunteers. The inputs are linked to four components, including a distinct and supportive cycle representing OCIE staff and management (the “unit”), both as a main component and as a foundation for all OCIE activities. This is in consideration of the organizational and cultural environment in which the performance measurement system will exist, with the multidirectional linking indicating the ongoing iterative process involved in supporting both a performance measurement system, and the learning organization. In a learning culture, the more the PM system can incorporate discussion, learning and critical reflection into the work cycle, the greater chance for improved performance (Halachmi, 2002). By defining both individual and collective indicators of learning, and connecting these to other indicators, the logic model is representing the evolution of the learning capacity of OCIE.

Okanagan College International Education is comprised of three other main **components** Internationalization, Student/Client Recruitment, Student Retention, previously identified through departmental budgetary allocations, and which all work closely together in support of each other. The **implementation objectives** for the main components are the work that is ongoing in the department without any expectation of an outcome and include those objectives identified by OCIE management in discussions regarding the unit plan. Implementation objectives are a reminder of the need for successful implementation before the desired outcomes can be achieved. Managing resistance to a performance measurement system begins here, as a failure to implement due to resource shortages or conflicts with experience and/or values of those responsible for implementation, can lead to stalling and potential failure of the system (McDavid et al, 2006)

The **outputs** represent the amount of work that is done upon implementation. Outputs can include either lag measures that describe the work completed, and lead, or forward looking, predictive measures of processes or learning that the department views as innovative and strategic in support of ongoing performance (Anderson & McAdam, 2004). Often, what is measured is viewed as an important influence on the inputs received (Johnsen, 2005), and therefore there is the perception that “what gets measured, gets managed” (Chatterji et al. 2006). The goal is to ensure values are reflected in what is measured and that more information is generated for OCIE that is reliable, comparable and valid. The objective of measurement is to identify key metrics, be sure about what is being measured and how, and ensure they reflect the goals of OCIE (Chatterji et al. 2006)

The outputs and short-term outcomes are connected by various **linking constructs** that represent the work that is performed in the department at a point in time. The **short-term outcomes** in the organizational logic model are an indication of the potential benefits of the department’s activities and represent the stated core objectives of OCIE in their strategic plan. The linking constructs that lead to the potential benefits for internationalization, student/client recruitment, student retention and employee development at OCIE represent those that were identified in the 2008 Unit Plan process. The linking construct for employee development was informed by the literature review and represents support for both the PM system and the learning organization.

The introduction of a performance measurement system for OCIE provides a tremendous benefit at both the departmental and institutional level. It is intended that the benefits identified in the logic model as medium-term outcomes will result from the short term outcomes; however, the medium-term outcomes are not solely dependent on international’s activities and internationalization efforts led by OCIE. They will be determined by the level of resources and commitment institutionally, inter-departmental priorities, and both domestic and international student needs. The medium-term outcomes therefore require the support of the institution and recognition of the convergence of OCIE and OC commitments to internationalization objectives and key institutional priorities for all students at all campuses.

Leadership activities undertaken by OCIE related to the promotion of internationalization along with departmental processes to support a learning culture, is mutually beneficial. These activities will inform the long-term institutional outcomes including the **learning organization**, **regions of equal value**, **cultural and social diversity**, and **intercultural campuses** across the regions. The capacity of Okanagan College to support increased international activity may be affected by a multitude of factors external to OCIE; therefore the medium and long-term outcomes can be excluded from measurement of the effectiveness of OCIE’s programs and services at this time.

It is important to distinguish between the main components of OCIE and the environment in which it operates. Environmental considerations include globalization forces such as financial markets, government policies and regulations, health and safety concerns, and overall reliance on continuing stability for international student mobility. The institutional capacity for increases in programs and services can also affect the department’s activities and outcome; however, these outcomes are equally affected by the organizational and cultural environment in which OCIE continues to operate.

## 5.3 Components, Outputs, and Outcomes

The performance measurement system design is flexible to ensure both generative and adaptive measures can, and are, incorporated into the system in support of each of the four components and their subsequent, and connected, implementation objectives. In consideration of resource constraints and commitment to the learning process, the initial system introduced to OCIE is designed to measure a baseline of indicators that are both reasonable and measurable using current resources in collaborative processes and structures.

### 1. Internationalization

*“...reshaping the way(s) we know and the way(s) we engage the world...”*  
(IETP, 2007)

*Implementation objectives:*

- ✓ To provide leadership in Okanagan College towards developing a global perspective in teaching and learning
- ✓ To research, develop, and implement international programs and partnerships for OC students and faculty

These two implementation objectives have been identified as complementary to each other and working towards the same outcome. The outcome is dependent on providing both services and programs for all learners at the College, and, as internationalization is considered a quality improvement process, this is something that will grow and develop over time. The outcome is therefore supported by the work that is done as indicated by the linking constructs:

*Linking constructs:*

- ✓ through the promotion of intercultural learning and participation, and
- ✓ through international opportunities promoted and developed for all learners

*Short-term outcome:*

- ***Increase intercultural and international engagement institutionally - “Global Citizenship”***

The outputs that have been identified as supporting the outcome are recognized as the foundation in internationalization of a post-secondary institution (Tunney & White, 2007). As any activity initially will provide a baseline for improvement, the outputs identified will establish this baseline, and in the process, offer the opportunity to engage the institution and facilitate discussion surrounding opportunities for international and intercultural learning. The outputs for international and intercultural learning are therefore connected and include:

*Outputs:*

- ✓ The percentage of courses taught at OC that have one-hundred percent international content, and the percentage of those which offer any international content -
  - To indicate the degree to which faculty and students are already engaged in intercultural learning, and through communicative structures, share resources and information in support of the internationalization process.

- ✓ The number of seminar/training sessions on intercultural awareness and learning, and the number of participants –
  - With faculty, administration, and staff interacting on a daily basis with international students, sessions developed to engage the OC community through seminars/training can both provide information, and share experiences to inform the internationalization process.
- ✓ The number of international, student-led, campus-wide learning events –
  - All learners, primarily students, and including those with intercultural or international experiences, can be further engaged in their learning experience at OC with leadership roles in events designed to communicate international activities, cultural events, and international experiences to the OC community.
- ✓ The total scholarship funding, the number of students funded, the number of applicants, and the average amount of scholarship per applicant, along with the percentage of partnerships that are being supported by study abroad activity
  - The level of interest in scholarships, the amount of available funding, along with the chosen partner institutions will provide OCIE with valuable student information in support of generating awareness and developing international study abroad opportunities to suit all learners needs
- ✓ The total professional development funds used internationally, and the number of faculty using the funds internationally
  - indicating a level of awareness of international opportunities that exist for faculty, and promoting these campus wide

Initially, the measurement for internationalization activity will be mostly quantitative, although the development of the systems and processes for collection will contribute valuable soft data through new and existing channels of communication and the learning process. This does not preclude OCIE from developing surveys to measure the perception of participants in training sessions, or student exchange programs, or those involved in any future campus-wide international activity committees. These are all valuable activities that provide invaluable information which, through use of appropriate tools, will contribute to internationalization efforts at OCIE.

## **2. Student/Client Recruitment**

### *Implementation objective:*

- ✓ To establish and maintain new and existing markets for OCIE programs and services internationally

As indicated in the logic model, all of the components in international education are connected, and therefore in one way or another, share implementation objectives. This is in consideration of the relatively small size of permanent staff, and the overlap of roles and responsibilities that follows. Both internationalization and student retention inform student/client recruitment as interaction at various levels builds upon client, partner, and student relationships to inform and support recruitment efforts. The outcome of student/client recruitment is also connected to student retention as new students/clients using retention services have the potential to contribute to future student/client numbers.

*Linking constructs:*

- ✓ Programs and services promoted in new and existing markets meet OCIE & student needs
- ✓ Education and related services meet students needs

*Short-term outcomes:*

- ***An increase in international students and contact training to support OCIE programs and services***
- ***Positive international experience – “satisfied students”***

In consideration of the overlap in components, and as systems and processes for marketing at OCIE are currently being developed, the basis for measurement of student/client recruitment will, at this time, focus on input and output measures and the use of ratios based on the marketing budget. The international education department operates on a cost-recovery basis; therefore, the outcome is dependent on student numbers and the continuing provision of programs and services. Initial measures will therefore involve the use of financial indicators as follows:

*Outputs:*

- ✓ Total revenue generated by training contracts/study tours; staff hours per contract
  - These numbers can provide information on the revenue brought in by individual contracts, with more detailed information on the average cost per contract to provide the program and services.
- ✓ Total revenue generated per market; total investment per market
  - Investment in a market can lead to both immediate and future benefits, therefore investment and revenue, recorded over time, provides valuable information for strategic planning.
- ✓ Total student revenue; total number of students
  - These numbers can also reveal information on the revenue brought in by individual students on average, and also by market.

These measures of performance will provide the opportunity to compare the level of investment and return on a market over time, and as currently tracked, divide the markets by student number to track the increase or decrease of these students over time. As meeting the needs of students is a key factor in all program and service activities, and will impact both international marketing efforts and retention success, measurement of this connection in the future will provide valuable information, especially in a cross-cultural context.

### **3. Student Retention**

*Implementation objective:*

- ✓ To provide quality education and related services to students

The student retention team plays a key role in the international education department as the programs and services they provide to international students not only affect the international

student experience while studying at Okanagan College, but through referrals to family and friends, can influence future international student enrollment. Ensuring that education and related services meet student needs is therefore a link to their outcome, and can directly affect the outcome for the student/client recruitment.

*Linking construct:*

- ✓ Education and related services meet student needs

*Short-term outcome:*

- **Positive international experience – “satisfied students**

The outcome and linking construct for the student retention component provide an indication of the subjective nature of the programs and services offered to international students. For this reason, student access to the international office, a personal connection to the staff, and involvement in international-led activities have been identified as key elements of service that lead to international student satisfaction at OCIE. This kind of student engagement is supported by internationalization research that emphasizes the need to invest in programs and services for international students to help them integrate into Canadian culture and Canadian norms (Tamburri, 2007). International Education staff is the first point of contact at Okanagan College and therefore the following initial measures have been identified:

*Outputs:*

- ✓ the number of student hours in educational advising with an indication of the percentage of these hours that are for education, immigration, and employment
  - With an increase in resources dedicated to informing students on government immigration and employment policies, as well as educational programs and services, this information will be invaluable for the department advising staff for allocation of resources and future planning requirements.
- ✓ the number of student life activities and the percentage of international students participating per activity
  - With updated computer registration systems for international activities, this information will be easily accessed and provide staff with information on the level of participation per activity, as well indicate the non-participants for follow-up.
- ✓ the number of student hours with the home-stay coordinator and the percentage of time spent for housing issues, medical/dental, and settlement issues
  - Similar to educational advisors, the staff involved in housing and settlement for international students can provide information on the time spent in various roles to further inform OCIE programs and services.

Although initially measuring services, programs such as the conversation partner program and the newly introduced peer mentor program are a few of the ways in which OCIE is integrating international students and Canadian students towards culturally diverse campuses. Utilizing the current system of surveys and interviews will require slight modifications to ensure the information provided will adequately measure for student satisfaction based on these primary services and programs. This is in support of both international offices (Vernon and Kelowna)

and the student retention teams who offer these services at each campus. Through pre and post survey information, program evaluations, and soft-data from interaction with students, further information regarding future program and service development can be identified, and resources allocated, in support of student satisfaction.

#### 4. Unit Administration

*“Collaborative learning activities.... encouraging shared decision-making and informed risk-taking, innovation and creativity...”*

*(Foundational principle, Okanagan College Strategic Plan, ‘The Learning Organization’)*

*Implementation objective:*

- ✓ To support roles and responsibilities, and facilitate their growth, in accordance with individual, OCIE, and institutional mission, goals and values.

Unit Administration, the management and staff that work at OCIE, is a foundational component of the department as indicated in the logic model, both as its own multidimensional construct of learning, and in support of all other OCIE components. The intended outcome supports the implementation objective through the creation of structures that facilitate, support and capture learning towards individual, departmental and organizational goals (Yang, 2003).

*Linking construct:*

- ✓ Structures and processes to generate and adapt information

*Short-term outcome:*

- **Individual and OCIE learning**

Although a ‘learning culture’ represents an abstract variable, there are tools used by researchers to infer relationships, including success with measuring and validating a learning culture by relating it to organizational performance (Yang, 2003; Dymock, 2003). Using the research from the construction of ‘The Dimensions of the Learning Organization Questionnaire (DLQQ)’, the measures identified for OCIE initially represent the individual and team levels of organizational learning:

*Outputs:*

- ✓ number of working groups involving OCIE staff for individual, OCIE and OC development
  - This information will include working groups or committees that could be departmental, institutional, community, provincial or international and will indicate the level of involvement of OCIE staff in ‘learning’ activities
- ✓ percentage of students, OCIE staff, OC staff and external clients and/or partners in each working group
  - To further qualify the working groups and related activity to OCIE, this information will provide the department with an indication of the level of activity in support of OCIE and further indicate stakeholder’s involvement in the improvement of programs and services to international students.
- ✓ total amount of funds spend on professional development activity

- ✓ percentage of professional development funds supporting individual competency/skill development, OCIE services/program development
  - In support of learning, identifying the funded activity undertaken by staff in relation to the intended benefits will provide information for informed decision-making in relation to individual and departmental goals.
- ✓ percentage of staff involved as key stakeholders in the performance measurement and management development process
  - To support implementation, the level of departmental involvement in the pm system is a deliberate measure intended to inform the department of the level of engagement in pm as a collaborative learning process.

These reflect behavioral and observable outputs towards the building of a learning culture that have been shown to have a measurable impact on organizational performance. Appropriate training and development methodologies, along with collaborative systems and structures that determine how the work is carried out and how people are managed, have become key elements that contribute to a learning organization (Dymock, 2003). Beginning to track the steps taken at this time to facilitate these cultural changes will contribute valuable data over time. Future processing of this information and analysis can attempt to determine relationships among these dimensions, related constructs and eventually organizational outcomes. Although the capacity for evaluating the results from these measures may have to be provided at an institutional level (perhaps through use of the DLQQ), OCIE can provide leadership by developing structures and work processes that are proven methods in support of a culture of learning (Yang, 2003).

The Public Sector Performance Management cycle is currently followed informally by OC through the reporting requirements of the Ministry, and in turn informally by the Director of OCIE. Through system connections, embedded systems, and leadership for learning, management at OCIE has the opportunity to mediate between individual-level learning activities and organizational outcomes (Yang, 2003). All of the intended short-term outcomes can be enhanced over time by adhering to these learning principles in support of individual, team and organizational learning, and further contribute to the medium and long term outcomes identified with organizational performance. With a formative focus for their performance measurement system, the International Education department will begin bringing the requirements of OC and OCIE together in a strategic planning and reporting process that will include all of the involved stakeholders, including those delivering and receiving the programs and services.

## 6.0 Next Steps

### 6.1 Three Key Recommendations

Three components are required to maximize the benefits of a performance measurement system for Okanagan College International Education:

- A well defined model of strategic success
- Specific structures and processes to continuously align the performance measurement system with the departmental strategy
- External program evaluation in support of managing and improving the performance measurement system for program/service quality improvement

A performance measurement system for OCIE will enhance a strategic management process by continuously challenging the assumptions and the strategy itself through deliberate learning processes and data analysis (Bourne et al, 2000). To increase the success of a performance measurement system for OCIE, and in support of the learning organization, the three key recommendations can be implemented over two years with the following five steps:

#### **I. Adopt the Model of Strategic Success for OCIE – July 2008**

##### **1. *Verify the Logic Model with Stakeholders* –**

- a. management or designated organizational leaders in the international education department must verify the logic model with staff and stakeholders to ensure it has adequately captured the story of OCIE performance
- b. clarify expectations about uses of performance/learning information

#### **II. Build Structures & Processes to Align Systems & Strategies – August 2008-April 2009**

##### **2. *Implement the Plan for Measuring Performance and Learning* –**

- a. ensure support of performance and learning with deliberate structures and processes to facilitate feedback based on the organizations strategic objectives
- b. use project management skills and provide resources to support implementation
  - i. design feedback processes for review and renewal

- ii. develop structures for the collection of performance information, including those facilitating communication for generative and adaptive learning

**3. *Support Implementation Through the Collection and Processing of Data on a Consistent and Regular Basis* –**

- a. collect performance information from key constructs over time
- b. review and continue data collection while enlisting the assistance of institutional resources for the recording, processing and analyzing of data over time
- c. interpret and report data through collaborative structures developed in support of learning, review and renewal, as well as in support of program/service quality improvements
- d. measure successful implementation through staff development, learning structures and validation of the strategy

**4. *Engage Staff through a Departmental Review of OCIE Performance/Learning* - Annually**

- a. provide workshops, information sessions, facilitate planning activity and capacity building for performance measurement

**III. *Seek External Evaluation* – April 2010 (Bi-Annually)**

**5. *Evaluate the Causal Linkages* –**

- a. maximize quality and effectiveness, provide further accountability to all stakeholders, and contribute to the development of a learning organization (McDavid et al, 2006)
- b. help inform OCIE by identifying areas, and potential strategies, for improvement
- c. evaluative framework suggested by Divorski and Scheirer (2000) would include the following steps:
  - i. assess organizational commitment and capacity for data quality
  - ii. assess quality of existing data
  - iii. respond to identified data limitations
  - iv. build quality into developing new performance data

In the spirit of continuous learning, and indicating a level of social responsibility that is welcome in the public sector, performance information can be presented in a way that clearly indicates limitations and benefits of the process, with realistic assessments of both outputs and outcomes. Henry Mintzberg, honoured at the 2007 Canadian Bureau of International Education (CBIE) annual conference in Ottawa for his contribution to higher education in Canada, has advocated for a view of management based on recognizing the mutually interdependent nature of the practical and organizational elements advocated in this report. With people behind both the technical and cultural dimension of any management system, Mintzberg (1997) believes that professional services as found in education can “never be better than the people that deliver

them.” Through a performance measurement system that recognizes the importance of the human commitment to quality service, and to individual and organizational learning, OCIE is well positioned to provide excellent programs and services to benefit international students, the institution, and the surrounding community.

## 7.0 CONCLUSION

The Director of International Education initiated the design of a performance measurement system for OCIE and would like to have implementation support in order to meet current and future reporting requirements. This will require the inclusion of all staff in key planning, development, implementation and measurement areas, ensuring the participation of senior management in the design process, and dedicated leadership committed to the process. As with all culture shifts, there are challenges and competition with resources and time, therefore, the level of priority placed on the process will be a defining influence.

Resources committed to processes that mutually support strategic thinking and planning, while facilitating employee engagement in support of the principles of a learning organization, can lead to greater success for OCIE as a department, and OC as an organization. Leadership in these areas will contribute to the development of appropriate measures relative to the changing needs and environment in which OCIE operates. Increased knowledge of measurement techniques and findings with support through professional development and institutionally shared resources, will improve the department's ability to ensure this information is relevant, valid, and responsive to the dynamic environment in which international education operates.

The logic model designed and recommended for OCIE offers a clearly articulated departmental system in support of Okanagan College as a learning organization, and highlights areas in which departmental and institutional operations can benefit from the use of performance measures. Collecting relevant information through consistent monitoring and reporting over time, and using evaluation to test the linkages, can communicate the value of activities, while also informing staff and stakeholders of how well the department is doing towards the achievement of their goals. The measurement activities that follow from the logic model, when used formatively in support of information and improvements, can therefore provide the Director, management and staff of OCIE with a tool for results and accountability in a learning environment.

With a clear understanding of the role performance measures can play in the creation of information, along with the practical tools and information provided in this report, OCIE may begin informing others of their activities towards achievement of their objectives. The commitment to the systems and processes, and to the evaluative capacity of the department to determine quality and effectiveness of their programs and services, is beneficial in both the short and long term. With deliberate and consistent effort, OCIE will be building systems to communicate, develop, design and implement recommendations in support of the continued and increased success of OCIE and OC.

The use of performance measures as information that will invite discussion has been formalized by the Government of Manitoba (2005) through presentation of its performance in a discussion document. The B.C. Ministry of Advanced Education, with their accountability framework and reporting expectations, confirm that the use of the performance measurement system at the government level has, to date, been informational. Support from Okanagan College for the initiation and formative use of performance measures would indicate a level of organizational commitment that would allow the performance and learning culture to grow and mature in the spirit of continuous learning.

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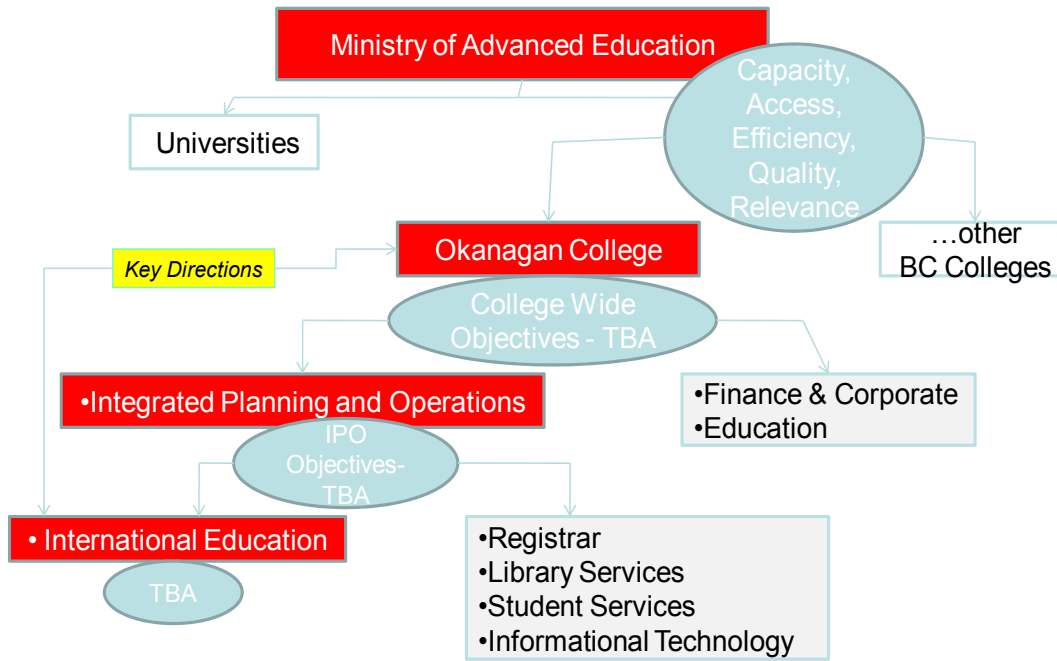
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## **9.0 APPENDICES**

## Appendix A: Okanagan College – Chain of Accountability

### BC Public Post-Secondary – Okanagan College *Reporting (Accountability) Chain*



## Appendix B: Okanagan College Key Directions

### Okanagan College Key Directions

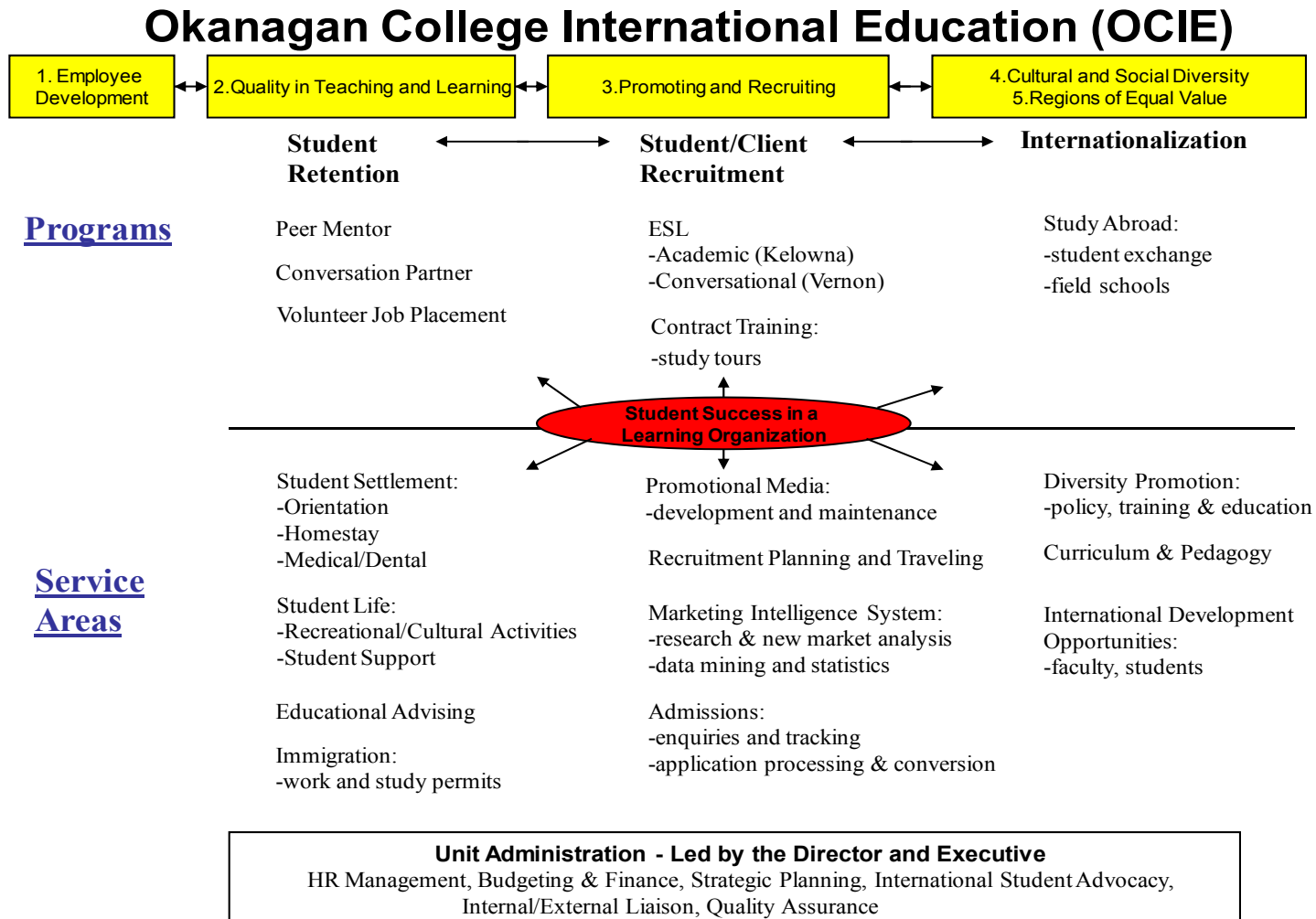
**Foundational Principle:** Learning Organization (Generative & Adaptive)\*

**Central Key Direction:** Student Success

1. Employee Development
2. Quality in Teaching and Learning
3. Promoting and Recruiting
4. Cultural and Social Diversity
5. Regions of Equal Value
6. Aboriginal Communities
7. Facilities

\*Peter M. Senge, "The Leader's New Work: Building Learning Organizations," in *Sloan Management Review* (Fall 1990), pp. 7-23

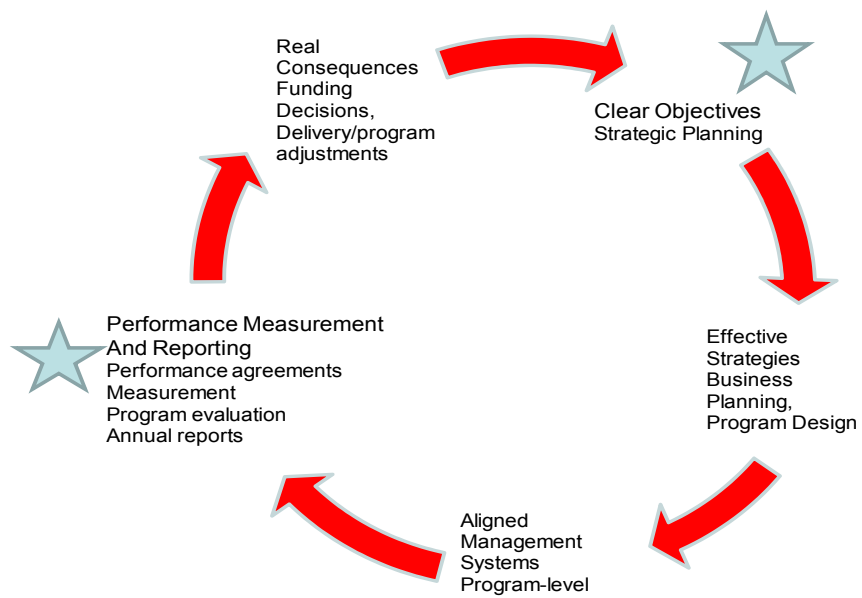
## Appendix C: Okanagan College International Education: Programs and Services



## Appendix D: Public Sector Performance Management – Management Processes

### Public Sector Performance Management: Management Processes\*

\*McDavid, James C. and Laura R.L. Hawthorn, "Program Evaluation & Performance Measurement: An Introduction to Practice," 2006 Sage Publications



## Appendix E: The Multiple Aims of Performance Measurement<sup>1</sup>

- To help clarify organization goals, directions and expectation.
- To help organizations learn how to accomplish goals more effectively.
- To communicate the priorities of the organization.
- To support strategic/business line planning by linking broad statements of direction to specific operational outputs and outcomes.
- To support budgetary planning and resource allocation processes.
- To monitor the operation of programs and to make continuous improvements.
- To motivate public servants and to restore pride within the public service that it is making a positive contribution.
- To enable citizens to make better informed decisions in the use of public programs.
- To restore public confidence that they are receiving value for money in public spending.
- To assess whether the organization is achieving its goals.
- To strengthen internal administrative and external political accountability.

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<sup>1</sup> Thomas, Paul G. “Performance Measurement, Reporting, Obstacles, and Accountability: Recent Trends And Future Directions,” ANU E Press, Canberra, 2006, p11

## Appendix F: The Learning Environment<sup>2</sup>

### **The Learning Environment (LEARNING ENVIRONMENT)**

To what extent do you agree with the following statements:

#### *Participative Policy Making (POLICIES):*

- Several people from your department are currently discussing new ideas to develop your company's policies.
- The employees in your department respect each other's different points of view.

#### *Internal Exchange (EXCHANGE):*

- Your department is discussing cross-section problems openly with other departments in your company.
- Your department exchanges knowledge and experience with other departments in your company.

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<sup>2</sup> Thomsen, Hanne Kargaard and Viggo Hoest, "Employees' Perception of the Learning Organization," Management Learning, 32.4:p22-23.

*Inter-company Learning (IC LEARN):*

- The employees in your department have regular meetings with other companies to exchange experience.
- Your company is quick to learn from other companies.

*Learning Climate (CLIMATE):*

- You and your colleagues learn from each other's mistakes.
- The environment in your department is characterized by learning new things and by questioning the way things are done.

**Boundary Workers as Environmental Scanners (SCANNER)**

- You and your colleagues often discuss news from the environment that may influence your company's development.
- The customers' views and ideas are currently being used to development of your company's products and services.

**Informating (IT USE)**

- The computer system is a help in making better decisions in your department.
- The computer system is a help in providing a higher information level in your department.

**The Reward System (REWARD)**

*Reward Flexibility (REWARD)*

- Your company has several ways of rewarding a good work performance.
- Your company's rewarding system is considered fair.

*Self-development Opportunities for All (DEVELOP)*

- Your department offers good opportunities for personal development.
- Your department offers good opportunities for professional development.

**Enabling Structures (STRUCTURE)**

- Your company tries different ways of organizing.
- It is possible for you to try different working functions in your company.

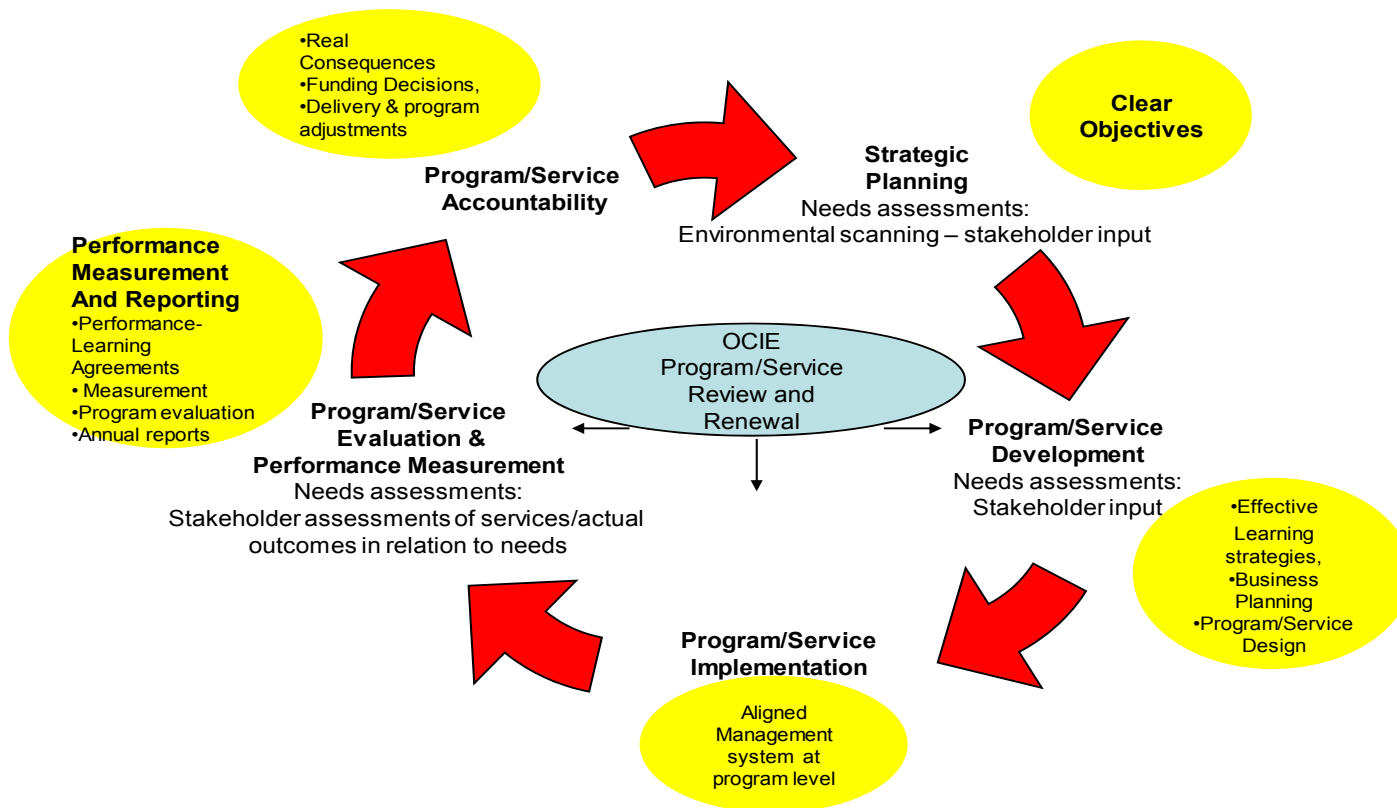
**A Learning Approach to Strategy (STRATEGY)**

- You know the content of your company's strategy.
- New ideas for changing your company's strategy—or part of the strategy—may be advanced by everyone in your company and not only by the management.

## Appendix G: Performance Management Cycle - Program/Service Review and Renewal

### Performance Management Cycle\*

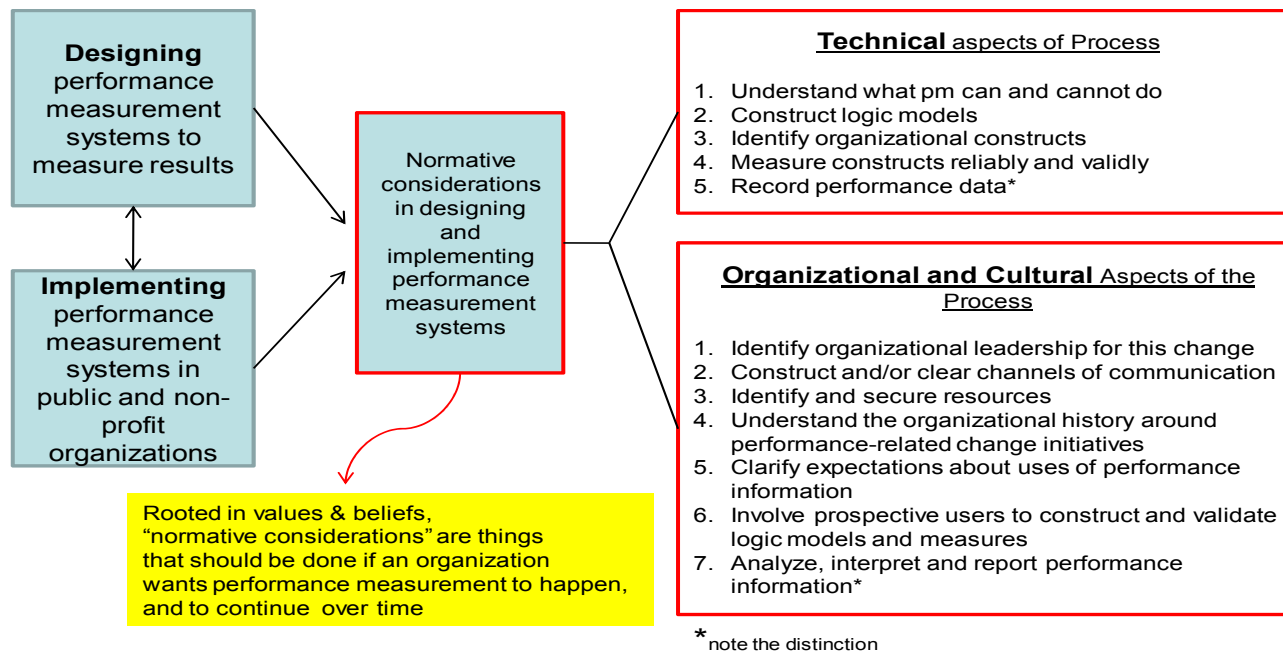
\*Simplified Model - McDavid, James C. and Laura R.L. Hawthorn, "Program Evaluation & Performance Measurement: An Introduction to Practice," 2006 Sage Publications



## Appendix H: Designing and Implementing Performance Measurement Systems

### Critical Feedback Relationship in Designing and Implementing Performance Measurement Systems

ADMN537 University of Victoria, James McDavid, 2007



## **Appendix I: Existing Entry Surveys**

- I.1 Pre-Arrival (used in Vernon)**
- I.2 Student Questionnaire**
- I.3 Entry Survey**

Simplify, update and amalgamate surveys to have one survey that is measuring the same construct, “satisfied students” over all campuses, and will provide information contributing to ‘meeting student needs’ as indicated on the Logic Model.

Name: \_\_\_\_\_

## Pre-Arrival Questions

**Your answers will help us provide you with better service.**

1. What are you hoping to learn from this ESL program?

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2. How do you plan to use your English communication skills after attending our program?  
(example: work, study, travel)

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3. Why did you choose to attend ESL courses at Okanagan College?

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4. Are you preparing for a TOEFL or TOEIC test? \_\_\_\_\_

Thank you.

Please **RETURN** this form with the  
Student profile and Arrival Information Sheet

STUDENT QUESTIONNAIRE    Student Name: \_\_\_\_\_  
Student Number: \_\_\_\_\_

1. Was Canada your country of choice for study abroad? Yes \_\_\_\_\_ No \_\_\_\_\_  
**(Place an X beside Yes or No)**

If not, which country was your first choice?

2. Was Okanagan College your first choice of institution for post secondary education in the Fall 2006 term?

How important was each of the following in choosing a college?

**(Please rate the top six from 1 to 3.  
1 is the most important reason)**

- 
- a) Low Cost Tuition \_\_\_\_\_  
b) Lower Cost of Living \_\_\_\_\_  
c) Safe Location \_\_\_\_\_  
d) Beautiful Location \_\_\_\_\_  
e) Fun \_\_\_\_\_  
f) An opportunity to study with  
Canadians \_\_\_\_\_  
g) Recommendations from  
family, friend, teacher \_\_\_\_\_  
h) Recommendation from  
Agent \_\_\_\_\_  
i) Opportunity to live with host  
family \_\_\_\_\_  
j) Opportunity to enrol in ESL  
plus university course \_\_\_\_\_  
k) Opportunity to transfer to a  
well-known university \_\_\_\_\_  
l) Quick return of admission  
letter \_\_\_\_\_  
m) Friendly response to inquiry \_\_\_\_\_  
n) Clear and easy-to-understand  
information package \_\_\_\_\_  
o) Web Site \_\_\_\_\_  
p) Other \_\_\_\_\_

What were the main reasons you chose OC?

NB For marketing purposes it is helpful to know what they were looking for initially and why they chose us. Sometimes these two columns can be answered quite differently. The response can help us prepare our marketing materials.

5. What is your MAIN education goal at Okanagan?

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6. How long do you plan to stay at OC? (choose one or two)

One Semester \_\_\_\_\_ Two Semesters \_\_\_\_\_

Until I obtain an ESL Completion Certificate \_\_\_\_\_

Until I obtain a degree/diploma \_\_\_\_\_

Until I am able to transfer to another university \_\_\_\_\_

I don't know \_\_\_\_\_

7. How did you learn about OC? (Check ALL applicable boxes)

Friend \_\_\_\_\_ Family \_\_\_\_\_ Agent \_\_\_\_\_ Teacher \_\_\_\_\_

School \_\_\_\_\_ Internet/Web Site \_\_\_\_\_ Education Fair \_\_\_\_\_

Other (Please explain) \_\_\_\_\_

---

8.

Services Questionnaire:

Learning Centre

Book Store

Library

Registration Office

### Entry Survey

Student Name: \_\_\_\_\_

Student Number: \_\_\_\_\_

1. Was Canada your country of choice for study abroad? Yes \_\_\_\_\_ No \_\_\_\_\_  
**(Place an X beside Yes or No)**

If not, which country was your first choice? \_\_\_\_\_

2. Why did you choose Canada? \_\_\_\_\_  
\_\_\_\_\_

3. What type of school were you looking for? **(Please rate from 1 to 3)**  
College \_\_\_\_\_ University \_\_\_\_\_ Language School \_\_\_\_\_

4. Why did you choose Okanagan College?  
**(Please rate the top six from 1 to 6. 1 is the most important reason)**

- Low Cost Tuition \_\_\_\_\_  
a) Lower Cost of Living \_\_\_\_\_  
b) Safe Location \_\_\_\_\_  
c) Beautiful Location \_\_\_\_\_  
d) Fun \_\_\_\_\_  
e) An opportunity to study with  
Canadians \_\_\_\_\_  
f) Recommendations from  
family, friend, teacher \_\_\_\_\_  
g) Recommendation from agent \_\_\_\_\_  
h) Opportunity to live with host  
Family \_\_\_\_\_  
i) Opportunity to enrol in ESL  
plus university course \_\_\_\_\_  
j) Opportunity to transfer to a  
well-known university \_\_\_\_\_  
k) Quick return of admission letter \_\_\_\_\_

6. How did you learn about OC? **(Check ALL applicable boxes)**

Friend \_\_\_\_\_ Family \_\_\_\_\_  
Agent \_\_\_\_\_ Teacher \_\_\_\_\_  
School \_\_\_\_\_ Internet/Web Site \_\_\_\_\_  
Study in Canada Education Fair \_\_\_\_\_  
Other (Please explain) \_\_\_\_\_

4. What are you planning to study after you finish ESL? \_\_\_\_\_

5. How long do you plan to stay at OC?  
**(choose one or two)**

One Semester \_\_\_\_\_  
Two Semesters \_\_\_\_\_  
Until I obtain an ESL Completion  
Certificate \_\_\_\_\_  
Until I obtain a degree/diploma \_\_\_\_\_  
Until I am able to transfer to another  
university \_\_\_\_\_  
I don't know \_\_\_\_\_

## **Appendix J: Existing End Semester/Program Surveys**

- J.1 ESL Intensive Immersion Program – End Questionnaire**
- J.2 ESL Student Semester End Survey**
- J.3 2003 OUC Semester End Questionnaire**
- J.4 Study Abroad and International Students Services Survey**

Simplify, update and amalgamate surveys to have one survey that is measuring the same construct, “satisfied students” over all campuses, and will provide information contributing to ‘meeting student needs’ as indicated on the Logic Model.

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## ESL Intensive Immersion Program END QUESTIONNAIRE

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*Your answers to this questionnaire will help improve and find the best ways for students to learn at OUC.*

*Completion of this questionnaire is voluntary, but we would very much appreciate your feedback.*

Name \_\_\_\_\_ Age \_\_\_\_\_ Nationality \_\_\_\_\_

1. Will you continue studying in Canada?  Yes  No  
If "yes" where will you study  OC  Other \_\_\_\_\_
  
2. Where did you hear about this program? \_\_\_\_\_  
a) Why did you choose this program \_\_\_\_\_  
b) Why did you choose Okanagan College? \_\_\_\_\_
  
3. a) Would you recommend this program to other people?  Yes  No  
Why or why not? \_\_\_\_\_  
b) Would you be willing to answer questions of potential students from your country?  
 Yes  No if yes please provide your e-mail address \_\_\_\_\_
  
5. What do you like best about the ESL Immersion Program?  
\_\_\_\_\_
  
6. Was there part of the program you would like to change?  
\_\_\_\_\_
  
7. Were you happy and comfortable in your homestay?  yes  no
  
8. Is there anything that would have improved your homestay experience?  
\_\_\_\_\_
  
9. Did you feel comfortable talking to Okanagan College Staff about your concerns?  
\_\_\_\_\_
  
10. Did the program meet your expectations?  Yes  No *If "No"*  
*please explain* \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_
  
11. The most beneficial parts of the program were:  ESL Integrated Program  
 Guided Learning  Volunteer Work Placement  Interactive Communication  
 Introduction to Canada  Homestay  Conversation Partners
12. The most beneficial parts of Guided Learning class were:  
 listening  pronunciation  TOEIC/TOEFL Preparation  
**Please write any other comments you have on the back of this page.**

ESL STUDENT

## SEMESTER END SURVEY

***Your answers to this questionnaire will help us plan courses and find the best ways for students to learn at Okanagan College. Thank you very much for your feedback.***

---

**Nationality:** \_\_\_\_\_

*Please circle: Are you Domestic or International?*

*Which English Essentials level are you in now?* \_\_\_\_\_

- Please circle one*
- |   |     |    |
|---|-----|----|
| 1. Do you plan to study ESL in the May/June session?            | Yes | No |
| 2. Do you plan to study ESL in the July/August session?         | Yes | No |
| 3. Do you plan to return to Okanagan College in September 2007? | Yes | No |
| 4. If yes, please circle the program you will attend.           |     |    |

ESL                      Academic                      ESL and Academic (combined)

5. If you are leaving OC, please indicate your reasons below. (place a check mark in the blank)

- a) \_\_\_\_\_ I always planned to finish at this time.
- b) \_\_\_\_\_ I have finished my studies.
- c) \_\_\_\_\_ I am transferring to a different school.
- d) \_\_\_\_\_ Other \_\_\_\_\_

6. If transferring to a different school, please indicate the reason:

- a) \_\_\_\_\_ Okanagan College does not offer the level of study I require.
- b) \_\_\_\_\_ Okanagan College does not offer the program I want.
- c) \_\_\_\_\_ I prefer to study in another city.
- d) \_\_\_\_\_ I prefer the new school over Okanagan College.
- e) \_\_\_\_\_ Other \_\_\_\_\_

7. Would you recommend OC to your friends and family?                      Yes                      No

8. How could Okanagan College have improved its programs/services to you? Please write on the back of the sheet if you need to.

---

THANK YOU!

**OUC *International*      Okanagan University College**

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SEMESTER END QUESTIONNAIRE

April 2003

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*Your answers to this questionnaire will help us plan courses and find the best ways for students to learn at OUC.  
Completion of this questionnaire is voluntary, but we would very much appreciate your feedback.*

Name \_\_\_\_\_ Age \_\_\_\_\_ Nationality \_\_\_\_\_

3. Will you continue studying for the Fall (Sep – Dec) semester? ف Yes ف No  
If your answer is 'No', please explain why: \_\_\_\_\_

4. Do you plan to continue studying for the Spring (May-June) semester? ف Yes ف No  
Summer (July - Aug) semester? ف Yes ف No  
If your answer is 'No', please explain why: \_\_\_\_\_

3. If you are going somewhere else to study, please explain why:

A I want to take courses/programs that are not available here ف Yes ف No  
If 'Yes' what are these courses/programs, and which institution will you be attending? \_\_\_\_\_

---

B I prefer to study in another city. ف Yes ف No  
If 'Yes', which city and why? \_\_\_\_\_

C Any other reason \_\_\_\_\_

4. A How long were you originally planning to study at OUC?  
ف Fall (Sep-Dec) ف Winter (Jan-Apr) ف Spring (May-Jun) ف Summer (Jul-Aug)

B Have your plans changed? ف Yes ف No  
If 'Yes', how? ف staying longer ف leaving earlier  
Why? \_\_\_\_\_

5. What do you like best about OUC? \_\_\_\_\_

6. What do you like least about OUC?

7. How can OUC help you improve your English skills? \_\_\_\_\_

---

FOR STUDENTS WHO HAVE USED THE SERVICES OF THE INTERNATIONAL  
EDUCATION OFFICE

(Study Abroad and International students.)

**In evaluating my most recent customer service experience in International Education, was the quality of service I received:**

**Very poor**  
**Somewhat unsatisfactory**  
**About average**  
**Very satisfactory**  
**Superior**

**The process of getting any problems or concerns resolved was**

**Very poor**  
**Somewhat satisfactory**  
**Above average**  
**Very satisfactory**  
**Superior**

**The staff in International Education are polite and courteous**

**Strongly disagree**  
**Somewhat disagree**  
**Neutral**  
**Somewhat agree**  
**Strongly agree**

**The staff in International Education are knowledgeable**

**Strongly disagree**  
**Somewhat disagree**  
**Neutral**  
**Somewhat agree**  
**Strongly agree**

**International Education Staff provide prompt and timely service to you.**

**Strongly disagree**  
**Somewhat disagree**  
**Neutral**  
**Somewhat agree**  
**Strongly agree**

**The waiting time in International Education is satisfactory.**

**Strongly disagree**  
**Somewhat disagree**  
**Neutral**  
**Somewhat agree**  
**Strongly agree**

**International Staff provide complete and accurate information to me in good time.**

**Strongly disagree**  
**Somewhat disagree**  
**Neutral**  
**Somewhat agree**  
**Strongly agree**

**International Staff reassure me in terms of my concerns and problems.**

**Strongly disagree**  
**Somewhat disagree**  
**Neutral**  
**Somewhat agree**  
**Strongly agree**

**International Staff are sympathetic to my individual needs and respect my feelings.**

**Strongly disagree**  
**Somewhat disagree**  
**Neutral**  
**Somewhat agree**  
**Strongly agree**

**The behaviour of International Education staff makes you feel that you can trust them**

**and have confidence in them**

**Strongly disagree**  
**Somewhat disagree**  
**Neutral**  
**Somewhat agree**  
**Strongly agree**

## **Appendix K: Existing Exit Interview**

### **K.1 Exit Interview Questions**

### **K.2 Exit Survey**

These two documents can be combined into one set of interview questions for each international student leaving OC. Although interviews can be difficult to arrange for exiting students, the quality of information is excellent and provides insights into the students experiences, culturally and academically while at OC. For international students, this is also a much more reliable and valid source of in depth information compared to a survey.

## EXIT Interview Questions

1. What was your original goal (s) in studying English at OC?
  
2. a) Did you meet your goal(s)?  
  
b) How did you meet your goal(s)?
  
3. How will you use your English once you leave the program?
  
4. Are you planning to write a TOEIC or TOEFL test?
  
5. Did you find OC on the internet? What search words do you use when looking for a school to study English?
  
6. Did you have any problems during your time at OC?
  
7. Is there anything that would have made this experience better for you?
  
8. Did you have a good homestay experience? Any problems?

## ESL STUDENT SEMESTER END SURVEY

*Your answers to this questionnaire will help us plan courses and find the best ways for students to learn at Okanagan College. Thank you very much for your feedback.*

---

**Nationality:** \_\_\_\_\_

*Please circle: Are you Domestic or International?*

*Which English Essentials level are you in now?* \_\_\_\_\_

- Please circle one*
- |   |          |                             |
|---|----------|-----------------------------|
| 6. Do you plan to study ESL in the May/June session?            | Yes      | No                          |
| 7. Do you plan to study ESL in the July/August session?         | Yes      | No                          |
| 8. Do you plan to return to Okanagan College in September 2007? | Yes      | No                          |
| 9. If yes, please circle the program you will attend.           |          |                             |
| ESL   | Academic | ESL and Academic (combined) |

10. If you are leaving OC, please indicate your reasons below. (place a check mark in the blank)

- a) \_\_\_\_\_ I always planned to finish at this time.
- b) \_\_\_\_\_ I have finished my studies.
- e) \_\_\_\_\_ I am transferring to a different school.
- f) \_\_\_\_\_ Other \_\_\_\_\_

6. If transferring to a different school, please indicate the reason:

- a) \_\_\_\_\_ Okanagan College does not offer the level of study I require.
- b) \_\_\_\_\_ Okanagan College does not offer the program I want.
- f) \_\_\_\_\_ I prefer to study in another city.
- g) \_\_\_\_\_ I prefer the new school over Okanagan College.
- h) \_\_\_\_\_ Other \_\_\_\_\_

7. Would you recommend OC to your friends and family? Yes                  No

8. How could Okanagan College have improved its programs/services to you? Please write on the back of the sheet if you need to.

---

THANK YOU!

## **Appendix L: Existing Host Family Evaluation**

This survey has been used sporadically for host families of short-term ESL group programs, and could be updated to use at semester, or program/service end for all international and exchange students. Triangulating measures collected from various sources (students, staff, host families) provides more valid and reliable results when determining international student satisfaction, and also would facilitate greater engagement with community partners (host families).

### Host Family Evaluation

Host Family Name \_\_\_\_\_

Student Name \_\_\_\_\_

(Please help us improve our programs by completing this form and returning it to OC staff at the graduation ceremony. Please do not give this form to your student to complete)

1. When you had a problem or concern about your student or the program, did you feel comfortable contacting OC staff about it?  
Yes \_\_\_\_ No \_\_\_\_ Sometimes \_\_\_\_

Comments: \_\_\_\_\_

2. Were you kept informed by OC staff about day-to-day activities?  
Yes \_\_\_\_ No \_\_\_\_ Sometimes \_\_\_\_

Comments: \_\_\_\_\_

3. Were you kept informed by your student about her/his extra curricular activities? For example, did she/he tell you ahead of time if she/he was going to be late for dinner?  
Yes \_\_\_\_ No \_\_\_\_ Sometimes \_\_\_\_

Comments: \_\_\_\_\_

4. Did your student offer to help you with household tasks?  
Yes \_\_\_\_ No \_\_\_\_ Sometimes \_\_\_\_

Comments: \_\_\_\_\_

5. What did you notice as your student's major problems with English communication? What could we teach them in English as a Second Language that would make communication easier for you?

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

6. How could we make your experience with your student better?

\_\_\_\_\_

## **Appendix M: Existing New Student Interview**

This interview, conducted by OCIE Cultural Liaisons, provides invaluable information on new student cultural, educational and social settlement progress and is conducted approximately 3-4 weeks after the start of classes. This is quality soft data that is communicated and acted upon each semester as required.

Without compromising confidentiality, certain responses could be fed into a database to provide comparative information with other measurement tools.

### NEW STUDENT SURVEY

**This interview is confidential and will be used to ensure  
your comfort and satisfaction at Okanagan College.**

<b>Student Information:</b>	<b>Student No.</b> _____
<b>Name:</b> _____	<b>Today's Date:</b> _____

**A. Background Information**

- Country of Birth: \_\_\_\_\_ Province \_\_\_\_\_ City \_\_\_\_\_
- Languages (mother tongue) \_\_\_\_\_ Others \_\_\_\_\_
- Age \_\_\_\_\_
- Please circle Male or Female
- How many years have you studied English? \_\_\_\_\_
- How old were you when you first started learning English? \_\_\_\_\_
- If you had a job back home, what did you do? \_\_\_\_\_

---

Section A.

What courses of ESL are you enrolled in? \_\_\_\_\_

Do you feel it is the right level for your ability? \_\_\_\_\_

Are the classes meeting your expectations? Yes \_\_\_\_\_ No \_\_\_\_\_

***If not, why not?*** \_\_\_\_\_

\_\_\_\_\_

Are you punctual to class? If not, why is this difficult for you? \_\_\_\_\_

\_\_\_\_\_

Do you get an opportunity to speak in your classes? To the students? To the instructor? \_\_\_\_\_

\_\_\_\_\_

Are you comfortable speaking to the other students? To the instructor? \_\_\_\_\_

How do you like the teaching style? Which activities do you like/not like? Please give examples.

\_\_\_\_\_

\_\_\_\_\_

How do you like the atmosphere of the classes? \_\_\_\_\_

## Adjustment to Canada

During the last month, approximately how much time have you spent in...?

(Hrs/day or hrs/week?)

1. Studying? \_\_\_\_\_
2. Watching TV or videos? \_\_\_\_\_
3. Sports? What? \_\_\_\_\_
4. Reading for pleasure in what language? \_\_\_\_\_  
If not in English, why not? \_\_\_\_\_
5. Listening to music (from what country?) \_\_\_\_\_
6. Getting together with friends? \_\_\_\_\_
7. Going out with host family? What/Where? \_\_\_\_\_
8. College activities? If no, why? \_\_\_\_\_
9. Other? What? \_\_\_\_\_
10. Have you had any health problems since coming to Canada? \_\_\_\_\_  
*(If you have to go to a doctor see Quentin or Fran.)*  
How long have you been sick? \_\_\_\_\_  
What did you do about your health problems? \_\_\_\_\_  
\_\_\_\_\_  
Did you have any trouble communicating with doctors or other medical professionals? \_\_\_\_\_  
\_\_\_\_\_
11. How often do you have contact with your family and friends back home? \_\_\_\_\_  
What do you miss about your homeland? \_\_\_\_\_  
What do you do when you feel homesick? \_\_\_\_\_  
How long have you been in Canada? \_\_\_\_\_  
When will you next see your family?
12. Did you receive the pre-arrival information package? \_\_\_\_\_  
Was it useful to prepare you for your arrival? \_\_\_\_\_  
How was it useful? \_\_\_\_\_
13. How was your arrival in Canada? What could we have done to make your arrival easier? \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

E. Life at Okanagan College

What program are you in? \_\_\_\_\_

If ESL, complete section A. If other, complete section B.

Did you find the orientation helpful? Yes \_\_\_\_\_ No \_\_\_\_\_

Do you require further information in the orientation? Yes \_\_\_\_\_ No \_\_\_\_\_

If yes, please tell us what information \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

Are the staff in the International office helpful? Yes \_\_\_\_\_ No \_\_\_\_\_

Are the cultural liaisons helpful? Yes \_\_\_\_\_ No \_\_\_\_\_

What are your education/career goals? \_\_\_\_\_

\_\_\_\_\_

## Friends

1. Do you find other international students friendly? Yes \_\_\_ No \_\_\_\_\_
2. Are you having any difficulties meeting other students? Yes \_\_\_\_\_ No \_\_\_\_\_
3. Have you made new friends here? Yes \_\_\_\_\_ No \_\_\_\_\_
4. Are your friends from (*Please circle*)  
a) your own country      b) other international students      c) Canadian?
5. Where did you meet your friends? \_\_\_\_\_
6. What do you do together? \_\_\_\_\_
7. What language do you communicate in? \_\_\_\_\_
8. How often do you get together? \_
9. Do you find Canadian students friendly? Yes \_\_\_\_\_ No \_\_\_\_\_  
Can you give an example?
10. Have you encountered any prejudice or discrimination from Canadians against you or other international students? Yes \_\_\_\_\_ No \_\_\_\_\_  
If yes, what happened? \_\_\_\_\_

## General

**What has been your best experience in Canada so far?** \_\_\_\_\_

**What has been your worst experience?** \_\_\_\_\_

\_\_\_\_\_

If a friend from home was thinking of going abroad to study would you recommend that he/she come to OC?  
Why or why not? \_\_\_\_\_

What have you liked and not liked about life in Canada? (Ask about good and bad aspects of each item)

5. Where do you live? Please circle: Host Family    Dormitory    Private Living arrangements

a) What do you eat here? \_

Who cooks? \_\_\_\_\_

How often do you eat food from your own country? \_\_\_\_\_

Cooked by whom? \_\_\_\_\_

b) Amount of money you have to spend?

Food:

Transportation:

Rent: \_\_\_\_\_

Other (Tel./Internet/etc.): \_\_\_\_\_

## Appendix N: Proposed Discussion Report - Program/Service Review

### Proposed Program/Service Review

The report will be complete with input from the relevant stakeholder groups.

The self study report will include the following elements:

1. Program/Service
2. Identification of potential measures – connection to construct (ie: meet student needs)
3. Analysis of the Results
4. Recommendations on how to improve the programs performance
5. Action plan to implement recommendations

#### Sample Action Plan

Performance Measures	Recommendations	Action	Responsibility	Time Frame
1.				
2.				