DeltaMediaLogo-Colour874 Internal

**Presented to:**

Nick Royle

CEO

The Cochrane Collaboration

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**Presented as a partnership of:**

delta media

Proposal for the Evaluation of   
The Cochrane Collaboration’s Annual Colloquia

# 1.0 Introduction

The Cochrane Collaboration is looking to review its Annual Colloquia and assess the events

in terms of the organization and governance that drive them, the extent to which the events achieve pre-determined organizational and financial goals, and in terms of the extent to which the events meet the expectations and needs of those who attend and those who could attend but do not. In the language of program evaluation, then, the Collaboration wants to assess the inputs used to present the event, including financial and human resources, as well as systems and other infrastructure. Second, the Collaboration seeks to assess the processes it has established to plan, develop and implement the Annual Colloquia. Third, this project will assess the outputs, outcomes and long term impact of the events – the extent to which these align with the overall priorities, goals and objectives of the organization.

We have grouped the specific requirements you set out for this work into these categories to help illustrate our thinking at this point.

## Assessing Inputs

* Model of organization: central (Secretariat), local (Cochrane Centre or Group), hybrid, etc.
* Role of professional conference organizers
* Colloquium Manager system (purpose, ownership/copyright, funding, responsibility)
* Funding for Colloquia (incl. review of sponsored entity registrations and Colloquium sponsorship policy)
* Stipends (purpose, value, management, etc.)

## Assessing Processes

* The extent to which the goals of The Cochrane Colloquia are clearly defined and the processes used to determine and articulate those goals
* How the Collaboration currently considers the competing interests in achieving purposes (i.e., internal versus external; science versus business)
* The format currently used for the event (i.e., overall mix of plenaries, workshops, papers and meetings)
* The current frequency of the Colloquium (i.e., annual, biannual, alternate models in alternate years, tie in with regional meetings, overlap with a related conference, etc.)
* The current duration of the event (i.e., 4 to 5 days, inclusion of pre-Colloquium days, free afternoon, etc.)
* The current approach to selecting the location of the Colloquium (i.e., policy of regional rotation, type of venue, accessibility)
* The current minimum program requirements (e.g., meeting times for entities, inclusion of specific sessions, etc.)
* The desirability and viability of specific formats for specific sessions (e.g., Opening Plenary, Meet the Entities, AGM)
* Current approaches to selecting plenary presenters (i.e., consideration of ratios of women and men, people from LMICs and other nations, consumers and non-consumers, etc.)

## Assessing Outputs, Outcomes and Impact

* Use of e-technologies to promote remote participation (e.g., live web streaming) and reduce resource use (e.g., abstract book on handhelds, etc.)
* Expectations of different stakeholders (Collaboration, active Cochrane contributors, potential contributors, local organizers, etc.) and the extent to which these are met
* Environmental impact of Colloquia (factors contributing to environmental impact, targets for reducing impact, strategies organizers and participants could be encouraged to implement)
* Colloquium Manager as a potential product for the Collaboration to offer other organizations
* Opportunity to offer event management services on behalf of other Cochrane and non-Cochrane groups
* Without compromising our ethics and while still delivering outstanding to value to delegates, the Collaboration aims to make a reasonable financial return on the events, with any “profits” re-invested in other Cochrane activities

# 2.0 Approach and Methodology

We propose a blended methodology that includes: (a) executive interviews, (b) a survey of Colloquium attendees and others involved with The Cochrane Collaboration in other capacities, (c) a competitive analysis of similar global events by organizations of similar scope and scale as the Collaboration, and (d) an expert review of the current inputs, processes, outputs and outcomes of the Annual Colloquium. The findings from all four methodologies will then be integrated into a final report of findings and recommendations. The recommendations will be mindful of the organization, its unique culture and current level of resources to ensure these are recommendations that can be implemented.

Before we move to gather this data, however, we will undertake a literature review to increase our understanding of the context and challenges. This review will then allow us to develop the specific criteria against which the Annual Colloquium will be assessed as well as the research instruments we will use to gather data.

All of these steps are described in more detail below.

## 2.1 Orientation

We will begin by communicating with you to confirm the overall approach we propose below, confirm roles and responsibilities, and to finalize timelines for the project. This will allow us to prepare and present a detailed plan for approval of The Cochrane Collaboration Secretariat and potentially the Steering Group.

## 2.2 Literature Review

We will work with the Collaboration to gather relevant literature with regard to the event, its goals as they are currently articulated, the inputs and processes used to implement the Colloquia and the outputs in terms of past events, their structure, content and overall implementation. Literature here may include planning documents, programs, and records kept by the organizing committee. We will also review literature related to the outcomes and impact of past events, such as any evaluation reports, comments from delegates, overall attendance figures and financial reports.

There are several recent initiatives that must be taken into account in the conduct of this assessment. Of particular importance is the strategic review conducted in 2008. The assessment of the Colloquium must be conducted in a manner that is consistent and aligned to this Strategic Review and inspired from the seven dialogues that contributed to the Reviews’ 26 recommendations. The Cochrane Collaboration Secretariat and Steering Group likely have documents and oversight mechanisms to guide local Colloquium organizers as they design and organize the annual colloquium. These tools, practices and mechanisms must be inventoried, classified and analyzed as they are an important source of information that must be examined in the context of this assessment. As the project team completes this part of the project, additional documents and information sources will become apparent. The team will conduct a triage of this information based on relevance to the project objectives.

## 2.3 Research Instruments

The Literature Review will allow us to develop draft research instruments. These will include:

* Executive Interview Questionnaire(s)
* Survey Questionnaire
* Key Criteria for the Expert Review and Evaluation of Past Events (Past experience shows that a half dozen, well-defined criteria will be instrumental in conducting a sound assessment.)

We will share draft instruments with you and collaborate with you to fine-tune these instruments before moving to the next phase.

## 2.4 Executive Interviews

We will work with you to develop a list of 12 to 15 individuals who have played a key role in past and present editions of the Colloquium. After an initial introduction by the Collaboration, we will reach out to these individuals and secure their participation in a 30- to 40-minute interview. The interview will be guided by the approved interview questionnaire and will focus on the inputs and processes used to implement the Colloquium as well as the individual’s own assessment of the output, outcomes and impact of the event. Additional questions will focus on what participants feels about the current overall goals of the Colloquia (as they understand them) and any new goals they feel might be more appropriate for the events. A final series of questions will invite participants to reflect on how the Colloquium could be improved to better achieve the overall priorities, goals and objectives of The Cochrane Collaboration. The final deliverable from this phase will be a report of findings that summarizes findings by question, while only presenting actual comments from participants anonymously.

## 2.5 Survey of Individuals within the Collaboration

We will work closely with you to prepare an introductory email which the Collaboration can then send to individuals within the Collaboration, including those who have attended one or more of the past three Colloquia. The survey will be housed on a secure website and will contain a short list of questions that can be answered in 10 to 12 minutes. Questions will focus on possible goals and processes for the Colloquia and respondents reactions to those. We will also ask questions about the processes used to design and implement the Colloquia and the extent to which these meet needs and expectations. Finally, we will ask a series of demographic questions to allow us to cross-tabulate responses based on key demographic variables such as age, location and years and type of involvement in the Collaboration. The final deliverable from this stage will be a report of findings, including tables of all quantitative data, analysis of these, and summaries of any responses to open-ended questions.

## 2.6 Competitive Analysis

We will begin by working with you to identify three or four organizations and events whose scope, scale, topics and target audiences are similar enough to The Cochrane Collaboration’s Annual Colloquium to make a comparison valuable and appropriate. Next, we will gather key documents and reports from these events and review them against our knowledge of The Cochrane Colloquia gained through the previous stages of our work. The final deliverable from this stage will be a report of findings that includes a comparison of the Colloquia and competing events (especially in terms of marketing, use of innovative technology, positioning and outcomes), along with recommendations on how best to position the Colloquia for success in this increasingly competitive field.

## 2.7 Expert Review

In this stage of our work, we will review the current inputs, processes, outputs, outcomes and impacts of the 2011, 2010 and 2009 Colloquia. As we do so, we will assess all elements against the approved list of criteria. In other words, we will assess the extent to which the event served to allow the Collaboration to achieve its goals and objectives – financial, organizational, cultural or otherwise. The assessment will largely be carried out by the members of our team with considerable experience in the implementation and evaluation of such events. The final deliverable from this stage will be a report of findings that assesses the Colloquia against the events considered in our competitive analysis and against the approved list of criteria we developed with you at the start of this process.

## 2.8 Integration and Final Report

The final step, of course, will be to integrate the findings from the various processes and reports described above. This integration of data will allow us to identify broad patterns that cut across methodologies and to forge a list of recommendations based on these. We will strive for recommendations that are aligned with the priorities and culture of the organization and that reflect the resources the Collaboration has to invest in the Colloquium, as well as the balance of income and expenses required for a positive return on investment. We will present the final report both in writing and as part of a teleconference call. In this way, we create maximum opportunities to seek clarity, refine our understanding and ensure our recommendations are indeed realistic and appropriate. Following a period of review, we will gather all feedback and refine the document to final.

# 3.0 Deliverables and Budget

The estimate below is based on the following schedule of professional fees (in Canadian dollars):

Executive Counsel B. Gauthier, A. Rabeau, N. Brager, G. Tait $200/hour

Senior Consultant K. Bennett $125/hour

Account Coordinator A. Brazeau $90/hour

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| --- | --- | --- |
| **Deliverable** | **Effort** | **Cost** |
| **3.1 Orientation** |  |  |
| Meeting (teleconference) to review and confirm approach, methodology, team and timelines; develop detailed action plan for the project | 3 hrs. EC  1 hr. SC | $600  $125 |
| **3.2 Literature Review** |  |  |
| Gather relevant literature | 4 hrs. EC  2 hrs. SC | $800  $250 |
| Review literature, prepare summaries of findings for team members and identify the key criteria for the expert review and evaluation of past events | 25 hrs. EC  3 hrs. SC | $5,000  $375 |
| **3.3 Research Instruments** |  |  |
| Develop draft research instruments, including: executive interview questionnaire(s), survey questionnaire and key criteria for the expert review and evaluation of past events | 5 hrs. EC  2 hrs. SC | $1,000  $250 |
| Share draft instruments and collaborate with the client to fine-tune | 4 hrs. EC | $800 |
| **3.4 Executive Interviews** |  |  |
| Develop list of 12 to 15 individuals who have played a key role in past and present editions of the Colloquium | 3 hrs. EC | $600 |
| Secure and conduct 30- to 40-minute interviews with 12 to 15 individuals | 16 hrs. EC  4 hrs. SC  2 hrs. AC | $3,200  $500  $180 |
| Prepare a draft report of findings and secure approval | 5 hrs. EC  2 hrs. SC | $1,000  $250 |
| **3.5 Survey of Individuals in the Collaboration** |  |  |
| Prepare an introductory email | 1 hr. SC | $125 |
| Post the survey questionnaire to a secure website | 6 hrs. SC | $750 |
| Gather and tabulate all quantitative data; perform cross-tabulations where appropriate | 4 hrs. EC  6 hrs. SC | $800  $750 |
| Summarize responses to open-ended questions | 2 hrs. SC  3 hrs. AC | $250  $270 |
| Prepare a draft report of findings and secure approval | 4 hrs. EC  2 hrs. SC | $800  $250 |

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| **Deliverable** | **Effort** | **Cost** |
| **3.6 Competitive Analysis** |  |  |
| Identify three or four comparable organizations and secure approval | 2 hrs. EC | $400 |
| Gather competitive information on the target audiences, scale, topics, locations and promotional strategies of these events; compare each to the Colloquia | 16 hrs. EC  8 hrs. SC  4 hrs. AC | $3,200  $1,000  $360 |
| Prepare a draft report of findings and secure approval | 4 hrs. EC  2 hrs. SC | $800  $250 |
| **3.7 Expert Review and Final Report** |  |  |
| Review and integrate all of the information gathered | 18 hrs. EC | $3,600 |
| Prepare a draft report of findings that assesses the Colloquia against the approved list of criteria we developed at the start of this process; secure approval | 15 hrs. EC  3 hrs. SC | $3,000  $375 |
| Integrate findings from all steps into a final report and include draft recommendations that are aligned with the priorities and culture of the organization and that reflect the resources the Collaboration has to invest in the Colloquium, as well as the income the event needs to generate to positively contribute to the other activities of the Collaboration. | 6 hrs. EC  2 hrs. SC | $1,200  $250 |
| Present the final report both in writing and as part of a teleconference call | 6 hrs. EC  2 hrs. SC | $1,200  $250 |
| Gather feedback from a review process and refine the document to final | 2 hrs. EC  1 hr. SC | $400  $125 |
| **3.9 Project Management** |  |  |
| Provide ongoing client liaison, administrative support and quality control | 12 hrs. EC  6 hrs. SC  3 hrs. AC | $2,400  $750  $270 |
| **TOTAL ESTIMATE** *(Applicable taxes extra)* |  | **$38,755** |

# 4.0 The Team

We are proud to propose the following team of evaluators and event specialists for this project.

## Bernard Gauthier, MA Executive Counsel

Bernard Gauthier has more than 25 years of corporate communications and marketing experience. His career encompasses the association sector, the public sector and the private sector. Bernard possesses a broad array of communications skills, including strategic communications planning, communications audits and evaluation, creative communications and marketing research.

Since joining Delta Media in 1994, Bernard has built and led the continuing growth of the firm’s association practice. In that time, he has provided strategic communications planning and counsel to many of the nation’s leading professional associations (including the Canadian Bar Association, the Canadian Pharmacists Association and Engineers Canada) as well as to a number of trade associations, including the Canadian Carpet Institute, the Canadian Cooperative Association, and the Canadian Construction Association. More recently, Bernard led the team that is currently developing a new marketing and communication strategy for The Cochrane Collaboration.

With a background in marketing communications and advertising, Bernard has also led the development of numerous marketing campaigns for public sector and corporate clients including MD Financial, Stanton Chase International, Industry Canada’s SchoolNet program and Canada’s Office of Consumer Affairs.

Prior to joining Delta Media, Bernard worked with leading organizations in education (St. Lawrence College), the financial services sector (Transamerica Life, Prudential Life) and with national associations in the sport and the Canadian Veterinary Medical Association.

Fluently bilingual, Bernard holds a Bachelor of Arts degree in Communications from Concordia University and a Master of Arts degree in Communications from Carleton University. He is currently completing a PhD in Communications (ABD) at Carleton University, where he also serves as a sessional lecturer in advertising and public relations.

Bernard is an active member and former Board member (communications co-chair) of the Canadian Society of Association Executives (CSAE). He writes a semi-monthly column (*The PR Clinic*) for the Ottawa-Gatineau chapter newsletter and regularly presents to national and local audiences of association executives on behalf of the CSAE (including a presentation on evaluating communications programs delivered at the CSAE Annual Conference in Vancouver). Bernard also serves as a member of the Professional Advisory Committee (and former board member) of the Learning Disabilities Association of Canada, and as a *pro bono* advisor to Peace Brigades International – Canada and Lotus Outreach.

## Alain Rabeau Executive Counsel

Alain Rabeau is an Executive Counsel at Intersol since 1991 and an owner of the firm since 1997. Delta Media and Intersol have partnered on a number of important projects over the past 10 years.

Alain supports clients with expertise in the areas of: strategic and operational planning, employee engagement and stakeholder consultations, governance, organizational development and change management, organizational learning and development. He has over twenty years of experienced in designing approaches that engage individuals and groups, builds consensus that allow for productive conversations leading to improved organizational results. He has demonstrated the capacity to produce tangible, actionable outputs emerging from such conversations. Drawing from his experience, Alain has provided managers and executives with the advice and coaching necessary to increase their organization’s effectiveness. He is also a skilled designer, facilitator and evaluator of a variety of conferences, seminars and workshops having working with groups ranging in size from eight to twelve hundred.

Alain has provided his services to Federal Government Departments and Agencies, national, provincial and community not-for-profit organizations as well as private corporations.

Alain holds a Masters of Public Administration from the École nationale d'administration publique in Montreal and a Bachelor of Commerce from the University of Ottawa. He has also completed numerous professional certification programs in the areas of strategy, interaction, change interventions and alternate dispute resolution from leading programs in Canada and the U.S.

Alain is a member of the Canadian Association of Management Consultants and the International Association of Facilitators. He is also Immediate Past-President of the Lifesaving Society of Canada, Past-President, Lifesaving Society Ontario Branch and Vice-President Strategic Planning, Lifesaving Society Ontario Branch. He is fluent in oral and written English and French.

## Dr. Nancy Brager Executive Counsel

Dr. Nancy Brager is an Associate Professor of Medicine in the Departments of Psychiatry and Internal Medicine at the University of Calgary where she is also, the Director of Undergraduate Education in Psychiatry.

She is the Chair of the Continuing Professional Committee for the Canadian Psychiatric Association and, until 2011, has been the Chair of the Scientific Program Committee for the Annual General Conference of the Canadian Psychiatric Association. She now Co-chairs the Scientific Program position with Dr. Glendon Tait. She previously co-chaired, for several years, the International Continuing Professional Development Conference for the Canadian Psychiatric Association with Dr. Ivan Silver.

She is the Chair of the Psychiatry Test Committee for the Medical Council of Canada, where she is also a member of the Central Examination Committee and a consultant to the Objectives Committee. In addition, she is currently working with the Royal College of Physicians and Surgeons of Canada on accreditation standards for providers of continuing professional development in Canada.

Dr. Brager has been a reviewer for several scientific journals including: *Academic Psychiatry*, the *Canadian Journal of Psychiatry* and the *Journal of Cystic Fibrosis*. She has been an invited speaker throughout North America and Europe as well as in the Middle East.

## Dr. Glendon Tait Executive Counsel

Dr. Glendon Tait is Assistant Professor in the Faculties of Medicine of Dalhousie University and University of Toronto. He has an MSc in Psychopharmacology and a Fellowship in Medical Education Research and as such as extensive experience with design, implementation, dissemination, and translation of quantitative and qualitative research methods. Drawing on this expertise, he participates extensively in continuing professional education, program planning, and peer review/editorial activities.

Having previously served for several years on the program committees of the Academy of Psychosomatic Medicine in the United States, and the program committee of the Canadian Psychiatric Association, he is currently Co-Chair of the Canadian Psychiatric Association Annual Conference, the largest continuing education scientific meeting for Canadian Psychiatrists. Working with Dr. Brager as co-chair, the two lead all aspects of peer review, scientific program planning and evaluation for this meeting.

Dr. Tait also serves on the Continuing Professional Development Committee of the Canadian Psychiatric Association, which oversees all aspects of continuing professional development planning and accreditation of continuing education programs for Canadian psychiatrists. He has presented widely at international scientific meetings. Finally, he sits on the Editorial Board for, and co-edits a section of the journal *Academic Psychiatry*, the premier journal for psychiatric educators in North America.

## Karen Bennett Senior Consultant

Karen Bennett is a Senior Consultant at Delta Media where she has provided public relations, strategic communications and evaluation expertise to leading organizations in the association and public sectors. Her experience encompasses all aspects of communications and marketing within both the virtual sphere and via traditional venues. She has successfully planned and implemented campaigns incorporating local, national and international communications services, online projects and strategic marketing programs. She has a keen interest and expertise in social media, online communities and website development.

Karen’s clients in the association sector include the Canadian Association of Occupational Therapists, the Canadian Internet Registration Authority and the Canadian Council of Human Resources Associations. Her public sector experience includes communications audits and evaluations for the Natural Sciences and Engineering Research Council and Infrastructure Canada. More recently, Karen was part of the team that is currently developing a new marketing and communication strategy for The Cochrane Collaboration.

Karen joined Delta Media following seven years serving the public, private and not-for-profit sectors. Her experience encompasses all aspects of communications and marketing. She has successfully mounted campaigns incorporating local, national and international communications services, event planning and strategic marketing programs.

Karen is a graduate of the University of Ottawa’s Communications program and a board member of the Ottawa chapter of the Marketing Research Intelligence Association.

## Alex Brazeau Account Coordinator

Alex is involved in the planning and the execution of a wide range of projects contributing his expertise and energy to communications and media relations plans, event management tactics, and research and writing projects. He has worked on many successful media and public relations campaigns on behalf of several leading health-related organizations, including the Academic Health Council, the Heart and Stroke Foundation of Canada, the College of Family Physicians of Canada and the Canadian Public Health Association.

Alex has also contributed to PR, media relations and web development projects for clients such as the Canadian Council of Human Resources Associations, the Exchange Pub, and the Canadian Council of Provincial Child and Youth Advocates. He also coordinates training programs for a number of clients in the public and not-for-profit sectors.

Alex holds a diploma in Public Relations from Algonquin College, in Ottawa.

# 5.0 The Firm

## 5.1 Delta Media

Delta Media opened its doors in 1991; in 2011, we celebrated our 20th year of operations – a milestone which makes us one of the most established communications firms in Ottawa and in Canada.

Delta Media is among Canada’s most experienced and sought-after communications firms for the **health sector**. Each year, between 40 and 50% of our revenues are generated by our not-for-profit clients in this sector.

Delta Media is also a trusted partner of **government** departments and agencies. We have worked with clients at the federal, provincial and municipal level on all aspects of communications directed to staff, businesses, consumers and the general public.

Delta Media has a staff of eight full-time communicators and administrators, as well as a cadre of talented partners in fields such as graphic design, web development, video production, social media and translation. Our partners have been working with us as extensions of our team for between five and ten years. We know their capabilities well and carefully select each one for the particular challenges of the client.

Our main office is in Ottawa and we recently opened a second office in Victoria, British Columbia.

## 5.2 The Intersol Group

Since 1989, the Intersol Group has perfected the art and science of engagement. Our consultants are recognized, certified experts in the field, equipped with Intersol’s unique set of proven, custom facilitation processes and tools.

Our consultants complement their skills and processes with insight gained from deep experience in a variety of industries and sectors, including:

• Government: Federal, Provincial and Municipal

• Associations, NGOs, Not-for-Profit

• Sciences: Healthcare, Environment, Agriculture, Natural Resources

• Technology: IM/IT, Engineering, Transportation, Telecom

• Public Safety and Security

• Human Resources: Conflict Resolution, Diversity, Social Development

We forge lasting relationships with our clients, listening to understand your challenges, and sharing your passion for finding effective solutions. We partner with you to tap into your knowledge and exceed your expectations.

Process, experience and relationships – This powerful combination has helped our clients meet their most complex challenges. That’s why so many of them return every year and refer us to their colleagues.

## 5.3 Specific Auditing and Evaluation Experience

Both Delta Media and Intersol have a solid record of helping clients in the association and public sectors audit and evaluate their communications programs and individual communications vehicles and events. Our combined expertise in research, engagement and communications provides us with all the tools required and with proven methodologies. Highlights of our experience in this field are provided below. We would be pleased to provide more detailed case studies upon request.

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| **Delta Media Client** | **Project** | **Methodologies** |
| Canadian Psychiatric Association | Evaluating readership of key CPA publications; strategic recommendations on publications and advertising sales | Readership survey |
| Canadian Council of Human Resources Association | Evaluation of the communications program (internal and external); development of a strategic communications plan | Literature review  Executive interviews  Focus groups |
| Transportation Association of Canada | Evaluation of communications programs and services; detailed evaluation of the TAC website; redevelopment of the TAC website | Member survey  Best practices analysis  Content analysis |
| Canadian Association of Medical Radiation Technologists | Evaluation of communications programs and services | Member survey  Gap analysis |
| Infrastructure Canada | Evaluation of the communications program in support of the Building Canada program; revisions to the strategic communications plan | Executive interviews  Content analysis |
| Natural Sciences and Engineering Research Council | Audit and evaluation of the internal communications program for the Common Administrative Services Division; development of a strategic communications plan | Content analysis  Executive Interviews  Audience survey |
| Association of Consulting Engineering Companies | Audit and evaluation of member communications vehicles; development of a strategic member communications plan and assistance with implementation of key new vehicles, including e-newsletter and website | Content analysis  Executive interviews  Member survey |
| **Intersol Clients** | **Project** | **Methodologies** |
| British Columbia Royal Commission on Worker’s Compensation | Assessment of the Worker’s Compensation Board’s practice of stakeholder involvement in the review of health and safety regulations in British Columbia, including a diagnostic of the efforts associated with the regulatory review and proposed a series of recommendations | Literature review  Executive interviews  Best practices review |
| Transport Canada | Evaluation of Transport Canada’s Marine, Rail and Aviation consultation and engagement mechanisms | Literature review  Stakeholder interviews  Focus groups  Best practices review |

## 5.4 Specific Experience with Large Meetings

Alain Rabeau has been added to our team specifically because of his experience helping clients assess, plan and implement complex events involving key stakeholders. A summary of his recent experience in this area is presented below.

**Canadian Food Inspection Agency - National Animal Health Strategy – Vision and Strategic Objectives Development Workshop. June 2007 to February 2008**

In the spring 2007, Mr. Rabeau was hired to assist the Director of the National Animal Health Strategy office to design, implement and evaluate an engagement strategy to involve Canadian veterinary officers, agri-food industry representatives, and representatives from stakeholder groups in the development of the Canadian Animal Health Strategy. The engagement approach was designed to involve these important stakeholders in three cornerstone events that would ultimately lead to the creation of the Animal Health Strategy.

Mr. Rabeau worked directly with the Director of the National Animal Health Strategy to prepare, design and lead a team of five facilitators to map out the “value chains” of domestic, farmed and wild animals in order to establish a benchmark upon which the National Animal Health Strategy could be developed. The results of the workshop were documented by the Intersol team and served the NAHS staff well in defining for the first time a current picture of the animal health system in Canada. This multi-stakeholder consultation brought together over 120 representatives from various federal government departments, provincial and territorial governments, national associations and not-for-profit interest groups over a period of two days.

Mr. Rabeau next designed an engagement process and led a team of facilitators to define the relevant issues to be addressed by the National Animal health Strategy. Most participants at this consultation attended the value chain mapping workshop several months earlier. This second workshop permitted the Intersol and NAHS team to identify, define and document twelve “issue areas” to which the national strategy aimed to address.

Finally, Mr. Rabeau and the Intersol and NAHS team engaged stakeholders in a series of discussions that reviewed and refined a vision for the NAHS and develop a series of strategic objectives and related actions for the 12 issue areas identified in the previous consultation. The results of this workshop were documented by the Intersol team and formed the basis of the first draft of the NAHS.

As Project Lead for all NAHS workshops, Mr. Rabeau provided advice on the structure of the National Animal Health Strategy and, in particular, the manner in which to conduct this strategy scoping meeting. The result of the workshop was the identification of eight key focus areas for the NAHS. Mr. Rabeau also designed the public involvement strategy surrounding the stakeholder workshops, stakeholder selection and preparation of the required materials to ensure a successful workshop. In preparation for the this strategy scoping meeting, over 12 industry and stakeholder Working Groups were established and conducted preparation work to feed into the NAHS. Working with the client team, Mr. Rabeau ensured that consultation objectives were established, established work plans, defined the expected results for the overall workshop and the specific breakout sessions, prepared and managed according to budget.

**ITWorld: Lac Carling Congress: A Unique Forum for Canadian CIO’s**

**January 2000 to June 2006**

Originally established in 1997 by the Public Service Chief Information Officers Council as a forum to discuss IT-related matters, the Lac Carling Congress evolved into the premier event regrouping CIO’s from federal, provincial and municipal jurisdictions. The Congress also brings all key technology and Information management providers into a unique forum to address cross-jurisdictional issues such as authentication, privacy, interoperability, service mapping, service standards and many more. In recent years, the Congress has evolved to include an international dimension as well as involving key politicians from all jurisdictions. This gathering of CIO’s not only aims to share cross-jurisdictional information. More importantly, it creates a multi-jurisdictional work plan that enables the federal, provincial and territorial and municipal governments to makes strides in providing Canadians with “e-services” and moving towards “e-democracy.” On an annual basis, Congress participants provide an update on the progress made in their respective assignments and a work plan is developed for the next 12 months. The principal requirement is for the preparation, design, facilitation and reporting associated with the Lac Carling Congress.

Mr. Rabeau was lead for the steering committee design and preparation of the course. He also acted as lead facilitator and managed a team of writers who prepared the Congress reports. He was involved in this capacity since Lac Carling Congress IV (2000 up to and including Lac Carling X in 2006). The Congress brought together 250 CIO and private sector representatives into a “working session”. These working sessions are structured according to Intersol’s unique adaptation of sound large groups principles and methodologies.

Simply put, specific themes are identified, the content is framed for adequate scope, structured discussions are conducted, common discussion points are identified and the consensus view is then refined into a “go forward” strategy and related action plan, that is the object of a report to subsequent Congresses. The hallmark of these was a concrete, multi-jurisdictional work plan to address issues and topics affecting all CIOs.

In the months following each Congress, a thorough assessment was conducted to ensure that objectives were met. The results of the assessment acted as the springboard to the planning efforts for the next year.

**Réseau des services de santé en français de l’Est de l’Ontario – Strategic Plan**

**October 2003 to April 2004**

Mr. Rabeau led a process for the development of a strategic and operational plan for Le réseau des services en santé en français de l’Est de l’Ontario. This project involved working with a steering committee made up of Board and staff members to develop a consultation approach that would bring together key members of the Francophone community to define the specific health care needs of their community leading to a strategy specific for Le réseau. A key feature to the development of the strategy was a consultation forum involving over 180 community members. This forum allowed for the identification of key issues, the development of a vision for French health care services and the establishment of key strategic result areas. Subsequent to the consultation forum, Mr. Rabeau assessed the consultation strategy and mechanisms and proposed significant adjustments to the way in which Le réseau conducted its engagement activities. Mr. Rabeau also worked closely with Board and staff to refine and finalize the plan and present it to the Réseau’s board of directors in January 2004. Between the months of February and April, Mr. Rabeau facilitated several workshops involving the executive director and key reports to establish an operational and personal work plans.

**Social Development Canada (SDC) – Caregiver Policy Conference, Fall 2005**

Mr. Rabeau wrote a scoping paper advising SDC on an approach to engage representatives from various Canadian non-government organizations in the development of a national policy statement and direction for caregivers. Mr. Rabeau assisted the department in the creation of a multi-stakeholder steering committee that in turn supported SDC Departmental officials in the development of this policy. Intersol also provided ongoing advice and support to a departmental working group, operating in parallel with the work of the steering committee during the preparation phase of the national consultation. Mr. Rabeau acted as the moderator to the National Policy Forum on Caregivers in October 2005 at which 300 Canadians participated.

**Health Canada – Healthy Living Symposium, 2003**

Mr. Rabeau was the co-designer of the National Symposium on Healthy Living held in June 2003. The Symposium brought together 300 Canadians who began the development of a pan-Canadian strategy on Healthy Living. Mr. Rabeau designed the methodology for the breakout discussions and was co-moderator for the plenary sessions.

# 6.0 Conclusion

We thank you for the opportunity to present this proposal. We are proud of the work we have conducted to date for The Cochrane Collaboration and feel confident that the knowledge we have gained will greatly assist us as we move to assess the single most visible and important event for the Collaboration. Our deep team of professional strategists and communicators has been enhanced with the addition of an expert in large meeting design, implementation and evaluation. More importantly, we have done so by drawing on a partnership between two firms that dates back more than a decade.

We look forward to your feedback and to working with you to refine the approach and methodology to meet your needs and expectations fully.

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