

SEARCH Canada Expert Panel Review

The First Three Years...

January 30, 2007

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Executive Summary

Purpose and Method

An expert panel undertook a review of SEARCH Canada in December, 2006. The aims of the review were to: i) assess the progress of SEARCH Canada in achieving the goals and objectives set forth in its inaugural 2004-2009 Strategic Plan; and ii) provide feedback and recommendations regarding challenges the organization is currently facing. The panel was provided with extensive SEARCH Canada documentation and met with forty-three representatives of SEARCH Canada and member partners.

Key Findings

The panel concluded that SEARCH Canada is making excellent progress toward its goals and objectives. The panel noted a number of strengths and achievements:

- The transition from SEARCH to SEARCH Canada has been achieved smoothly and with impressive buy-in from the member partners. This is undoubtedly due to the quality of leadership provided by the SEARCH Canada senior management and Board.
- SEARCH and SEARCH Canada have trained over 100 graduates (SEARCHers), the majority of whom have been retained in the Alberta health care system. SEARCHers described many personal benefits of participation in the program and the ongoing linkages with other SEARCHers across the province. All Regional Health Authorities (RHAs) described organizational benefits of participating in the program, particularly relating to enhanced capacity to apply research-based evidence in practice. The panel observed distinct differences in the extent to which RHAs viewed SEARCH Canada strategically and noted that the RHAs who got most out of SEARCH were those who were more strategic in their methods of choosing participants and subsequently integrating them into appropriate organizational structures.
- The enthusiasm and quality of the Faculty was very apparent – as were the innovative pedagogic approaches that are integral to SEARCH Canada.
- The electronic Desktop support was identified as a key element that was viewed extremely positively by SEARCHers. Many RHA representatives noted they would like to see broader access to the SEARCH Desktop for health care professionals and managers within their organizations.

The key impression of the panel was that SEARCH Canada has been very successful at building capacity within Alberta and that this is having transformative effects in some RHAs. The panel reflected that SEARCH Canada is building a key component of the knowledge-based infrastructure needed by Alberta's health care system and that this requires ongoing support.

The panel also recognized four significant challenges that SEARCH Canada faces, including: i) how to ensure long-term financial sustainability; ii) how to expand activities within Alberta; iii) whether and how to expand activities beyond Alberta, and iv) how to engage and sustain a vibrant faculty over time.

An overarching issue was finding the right balance between activities based in Alberta and activities based outside of Alberta. The panel strongly believed that the main emphasis of SEARCH Canada should remain in Alberta and that this should be supported by the Alberta health care system. The panel recognized that SEARCH and SEARCH Canada evolved over a 10-year period and emerged from a possibly unique context of supportive funding environment, committed Faculty leaders and a responsive health care system.

Whilst the panel believed that the philosophy and pedagogy of SEARCH programs have a wider currency outside of Alberta, it was unclear whether the specific SEARCH programs could or should be instituted elsewhere, given differences in context and resource across other jurisdictions. The panel considered that SEARCH Canada should make a national contribution to promoting its philosophy and ideas through active consultation with partners in other jurisdictions. Given this, the panel thought it unrealistic to anticipate activity outside of Alberta as an income generating activity. There was concern that an over emphasis on exporting SEARCH, especially if this were expected to be net revenue generating, could distract SEARCH Canada from its increasing potential within Alberta.

Key Recommendations to SEARCH Canada

The panel's primary recommendation is that SEARCH Canada should continue – and if it continues in the manner it has been, it will be truly transformative. Five broad recommendations to address the organization's challenges include:

1. View SEARCH Canada as an integral element of Alberta's health system. Fully articulate the value arguments for SEARCH Canada and based on this, actively seek ongoing investment of public funding within Alberta.
2. The major focus of SEARCH Canada should be on strengthening and expanding its programs and services within Alberta.
3. Move slowly and carefully in terms of expanding beyond Alberta. Do not jeopardize the building of a solid foundation in Alberta by focusing on other provinces.
4. Develop a strategic and proactive plan for ensuring an ongoing supply of enthusiastic, committed faculty.
5. In future evaluations focus more broadly on the impacts of SEARCH Canada's programs and services on the organizations it serves.

Background and Purpose of the Expert Panel Review

In 2004, the SEARCH program of the Alberta Heritage Foundation for Medical Research transitioned into SEARCH Canada, an independent, not-for-profit organization with its own identity, structure, and governance mechanisms. Its founding member organizations are the Alberta Heritage Foundation for Medical Research, the University of Calgary and Alberta's nine health regions (Palliser Health Region, Chinook Health Region, Calgary Health Region, David Thompson Health Region, East Central Health, Capital Health, Aspen Health Region, Peace Country Health and Northern Lights Health Region).

The intent of creating this new organization was to take advantage of emerging opportunities to: i) expand upon the many successes realized by SEARCH; ii) increase its reach and impact; and iii) strengthen Alberta's leadership in utilizing research, conducting applied research, and transferring knowledge. Above all, the intent was to improve health outcomes by strengthening the capacity of Alberta's health organizations to use the best possible evidence in planning and delivering health services.

Since 2004, the SEARCH Canada Board of Directors, management, staff, and faculty have established governance and operational structures, strengthened partnerships, ventured into other provinces, and explored new opportunities, all while continuing to offer its core programs and services: SEARCH Classic, a two-year training program, and SEARCH Custom, an expansion of the former Alberta Consultative Health Research Network. Although SEARCH Canada is a new organization, it is built upon a solid foundation of people, relationships, knowledge, experience, and technical resources developed over the past ten years.

When funding was approved for SEARCH Canada, a mid-point review to assess progress toward achieving the goals and objectives set forth in the organization's inaugural 2004-2009 Strategic Plan was requested. An expert panel was assembled to conduct this review and was specifically requested to address five aspects of SEARCH Canada operations, including:

1. Determine whether the organization is implementing its 2004-2009 Strategic Plan
2. Describe progress in implementing efficient board governance and developmental practices
3. Assess the impact of the SEARCH Canada program on member partners
4. Provide feedback regarding the direction and revisions that will promote SEARCH Canada, and
5. Provide a foundation/guidelines for future organizational and program evaluations¹

In addition, SEARCH Canada leadership requested feedback regarding three challenges the organization is currently facing:

1. Expanding operations and activities within Alberta
2. Expanding operations and activities beyond Alberta, and
3. Engaging academic faculty

¹ Terms of reference. SEARCH Canada Three-Year Progress Review.

Methodology

Panel member biographies are provided in Appendix 1. Multiple sources of information were drawn upon in conducting this review. First, panel members were provided with extensive documentation by SEARCH Canada. This included the organization's Five Year Strategic Plan, 2004-2009, numerous other planning documents, overviews of programs and services, profiles of member partners and their involvement with SEARCH Canada, various SEARCH Canada publications, and a selection of previously conducted program evaluations. Panel members were also afforded faculty-level access to the SEARCH Classic Desktop.

On December 13-15, 2006, the panel convened in Calgary and then Edmonton to consult in person, and in some cases by teleconference, with a wide array of SEARCH Canada stakeholders and member partners. In total, the panel talked with forty-three people, including representatives from each of Alberta's nine regional health authorities (RHAs), representatives from Alberta Health and Wellness, the Centre for Health and Policy Studies (University of Calgary), and the Centre for Health Evidence (University of Alberta), and SEARCH Canada Board members, management, and faculty. The panel also visited the SEARCH Canada offices and consulted there with operational staff. On December 15, the panel presented preliminary findings and recommendations to the SEARCH Canada Board of Directors.

This report was prepared by a researcher-writer with feedback from the panel chair and members. All panel members have agreed upon the content of the report and its recommendations.

Overview of the Report

The panel's findings and recommendations are presented in two sections. The "Findings" section includes discussion regarding: i) the extent to which SEARCH Canada is implementing its 2004-2009 Strategic Plan; ii) the organization's progress in implementing efficient and effective board governance; and iii) an assessment of the organization's impact on member partners.

In the "Discussion and Recommendations" section, an analysis of organizational strengths is presented. This is followed by discussion and recommendations regarding challenges the organization is currently facing, including: i) how to ensure long-term financial sustainability; ii) how to expand activities within Alberta; iii) whether and how to expand activities beyond Alberta; and iv) how to engage and sustain a vibrant faculty over time. Next, recommendations regarding future evaluations of SEARCH Canada's programs and services are presented.

Findings

Is SEARCH Canada implementing its 2004-2009 Strategic Plan?

A self-assessment conducted by SEARCH Canada in the fall of 2006 suggests that the organization is indeed implementing its 2004-2009 Strategic Plan (see Table 1 below for a brief synopsis of the self-assessment findings). After conducting its own review, the panel concluded that SEARCH Canada is making excellent progress toward its goals and objectives. Further, the panel was impressed by the thoughtful approach adopted by the SEARCH Canada Board and senior management.

| OBJECTIVES | STATUS/EVIDENCE |
|---|--|
| Create a new organizational identity focused on the mission of SEARCH with shared governance, leadership, and support by AHFMR and partners. | Accomplished. Not-for-profit organization (SEARCH Alberta) established 09/2004; independent board of directors established 11/2004; independent management and operations established 04/2005; name changed to SEARCH Canada 04/2005. |
| Develop capacity to enter into cost recovery or revenue-generating agreements. | In progress. Structures in place. Some programs/services have been delivered in Alberta on a cost-recovery basis. |
| Continue to provide the current and core elements of SEARCH program to Alberta's health professionals, specifically the two-year training opportunity. | Accomplished/ongoing. SEARCH IV completed; SEARCH V in progress; recruitment for SEARCH VI in progress. |
| Develop new and enhanced programs and services that extend the accessibility and scope of SEARCH both in Alberta and beyond; increase the impact of the program through custom training programs, extended information services, consulting services, and additional research and evaluation activity | Accomplished/ongoing. New programming in Alberta: ACHRN workshop and training capacity now integrated into SEARCH Canada as SEARCH Custom. Expansion of customized services and technology to various health regions and organizations. Strategic alliance with CHE established with several projects in progress. Numerous grant applications in concert with other organizations in Alberta. Beyond Alberta: Exploration of partnerships with the Michael Smith Health Research Foundation (BC) and Saskatchewan Health Research Foundation. |
| Activate and expand the extensive collaborative network to capitalize on its potential to meet evidence needs of the system. | In progress. SEARCH Forum 2005 and 2007; ongoing publication of newsletters. Discussions with Alberta Health & Wellness regarding relevance of SEARCH model for leadership and workforce development. |
| Strengthen partnerships and alliances that support program delivery, impact, and sustainability; enhance Alberta's leadership nationally and internationally | Accomplished/ongoing. Numerous new partnerships and collaborations developed within Alberta and beyond. |
| Table 1. SEARCH Canada 2004-2009 Strategic Plan: Objectives and Status ² | |

² Adapted from "SEARCH Canada Mid-Point Progress Review Self Assessment. Progress against objectives and anticipated strategies of the 2004-2009 Five-Year Plan." SEARCH Canada.

What progress is being made in implementing efficient and effective board governance and development practices?

The transition from SEARCH to SEARCH Canada was commented upon favorably during the review process, indicating a smooth and well-managed evolution. A non-representative governance structure is in place and appears to be operating effectively. No concerns about governance were raised during the review process. To the contrary, several member partners expressed satisfaction with the diversity of representation on the Board, and indicated they have been given ample opportunities to provide input and feedback regarding organizational operations and directions. As one RHA manager noted:

“I know that when SEARCH was re-grouping with a new strategic plan a couple of years ago, they did appoint a whole group of Directors. My understanding is there’s a good mix of representatives. I was confident they could have a broad range of input.”

Effective communications with the CEO, Sarah Hayward, appear to be instrumental in this regard. Invariably, the panel heard about Sarah’s willingness to listen to concerns and act upon them.

What is the impact of SEARCH Canada on its member partners? What opportunities and challenges does SEARCH present to its member partners?

Impacts and Opportunities for Health Region Member Partners

All member partners participating in the review process indicated that involvement with SEARCH Canada has generated positive impacts in their own organizations. RHA managers and SEARCH participants (past and present) were particularly outspoken in this regard, offering unanimous support for the organization’s programs and services. Espoused benefits of RHA engagement with SEARCH included individual and organizational development and access to valued resources such as the “Network”³, the SEARCH Desktop⁴, and the services of SEARCH Custom.

SEARCH participants spoke glowingly about SEARCH Classic and described numerous personal benefits deriving from their involvement. This program appears to be a significant catalyst for personal and professional development; for example, SEARCH participants commented:

“I think I’ve become a better leader.”

³ A virtual community of current and past SEARCHers and SEARCH Canada faculty

⁴ A sophisticated internet-based technology that enables communication within the Network and enables members to access high-quality literature and information resources that are relevant to local questions and concerns.

“Rich. Relevant. Rewarding. Incredibly worthwhile, incredibly responsive curriculum. I really appreciate that it was adult-based, and appreciated the focus on self-awareness, decision making, team interaction, communication style, learning styles.”

“It was a very positive experience personally and professionally. I benefited a great deal from the knowledge I gained. The way I work has almost completely changed as a result – the way I think, the tools I use, the skills I developed.”

Many RHA members also described changes occurring within their organizations as a result of SEARCH Canada programs and services. One region, for example, noted its culture is changing as a result of SEARCH Classic engagement:

“The culture in [our region] is changing.... We have to do more research, get more organized in this way. [SEARCH] encouraged me to talk about research with staff.... We’d like to build a research department and grow it in baby steps – a ‘go-to’ for the organization. We need dedicated people to be a resource for the whole region, versus individuals doing it in their daily work.” [RHA Manager]

Another rural health region is now viewing SEARCH Classic as an organizational development tool:

“We’re making a conscious effort to choose projects that the region is interested in. For SEARCH VI, we are looking at RHA priority areas. We didn’t really do that at the beginning – we started out looking at individual development. Now, we’re really looking at organizational development.” [RHA Manager]

The panel also heard about inter-regional impacts of SEARCH Canada’s endeavours. After ten years, for example, the SEARCH Network seems to be developing a life of its own, with some very beneficial impacts. This is evidenced by the development of new, inter-regional initiatives and partnerships, such as the Inter-regional Research and Evaluation Network, and the Northern Health Strategy among rural health regions. These collaborations were not instigated by SEARCH Canada per se, but rather, by past and present SEARCHers sharing concerns and ideas via the Network.

Arriving at the consultations as impartial observers charged with the task of conducting an independent and unbiased review, panel members soon found themselves energized by the positive reports they received from member partners. These reports provided mounting evidence that SEARCH Canada’s programs and services are having a significant impact within the province. Over the course of the consultations, it became increasingly clear to the panel that SEARCH Canada is underselling the value of its programs and services. A review of the organization’s documentation, for example, revealed citation of four benefits of SEARCH Classic participation:

- Applied research project support
- Applied learning opportunities
- Network development
- Knowledge access (e.g. the Desktop)

However, during the review process, numerous other benefits became evident. These include:

For the system and/or health region:

- A recruitment and retention 'edge'. Offering participation in SEARCH Classic is a clear signal of commitment to employee growth and development and improved quality of work life.
- Creation of leadership capacity through the development of skills, knowledge, and broader systems-wide perspectives and approaches; SEARCHers moving into leadership positions bring the SEARCH mentality with them.
- Succession planning opportunities in a time of dwindling health leadership.
- Increased capacity to access, evaluate, and apply research-based evidence in decision-making, and thus to enhance the effectiveness, efficiency, and quality of service provision. This is realized through:
 - Development of research and evaluation skills and knowledge
 - The ability of SEARCHers to help others in the organization use information technology tools, and find and apply evidence in practice and decision-making
 - Access to knowledge services, the Desktop, the Network, and SEARCH Custom
 - Understanding of context-specific organizational dynamics that influence the use of research-based evidence in decision-making and practice, and development of skills to facilitate this process

For the SEARCH participant:

- Enhanced self-efficacy and a general increase in personal confidence
- Increased confidence in approaching and interacting with university faculty and peers from other regions
- A professional development opportunity to acquire not only research and information technology skills, but also skills for working in diverse and interdisciplinary teams, navigating conflict, and facilitating organizational change
- Acquired skills to work in, and support, distributed leadership in organizations
- Participation in SEARCH Classic is a sign of personal commitment to learning and evidence-informed decision making
- Career advancement. The panel noted that many SEARCHers had advanced into leadership positions in their RHAs and/or pursued further education as a result of their involvement with SEARCH Classic.

The extent to which these benefits were capitalized upon varied across the regions. It seemed that rural regions that tried to use SEARCH more strategically enjoyed greater rewards. In those regions that had established a critical mass of SEARCHers within their structures, involvement with SEARCH appeared to be potentially transformative. In the view of the panel, the investment in SEARCH over the past decade is demonstrating substantial return on investment in these regions.

Impacts and Opportunities for other Member Partners

Other member partners and stakeholders described effective working relationships with SEARCH Canada and indicated their satisfaction that the organization is indeed accomplishing what it set out to do – and more.

From the academic perspective, insights into factors that encourage faculty to join and stay with SEARCH were provided when panel members asked faculty what attracted them to SEARCH and why they stay. They responded with great enthusiasm and passion:

“It is a space of energy for all of us.”

“Some of the most wonderful research questions come from front line workers.”

“You know you’re involved in something neat – something different – that you’re making a difference in the research agenda around the province.”

“It’s not just about research – it’s a sense of community, a sense of family – a group of like-minded people who have learned different ways of interacting. It’s rare.”

Clearly, working with SEARCH is a generative experience for these people. Faculty told the panel they are attracted to the pedagogy of SEARCH Classic; they like working with a practice base, which keeps research “real”; they enjoy the multidisciplinary approach to research and learning; they enjoy the opportunities afforded for networking; and, they appreciate the ability SEARCH gives them to make a real difference. Many also spoke of their enjoyment of “working in the white space”, a place that nurtures creativity and innovation. Some faculty, however, also recognized that the formalization of SEARCH programs could force them out of this generative space and erode the spirit of SEARCH.

“The irony is that we all like living in the white space – it’s intriguing, innovative – we don’t want to be put on an organizational chart.”

Faculty noted that the SEARCH Classic pedagogy is based on a community learning, adult-education approach that is often aspired-to in university settings, but rarely achieved. As one person noted, his/her university faculty could learn a lot by exploring the SEARCH Classic pedagogy.

SEARCH Canada, then, has something valuable to offer to colleges and universities.

“We’re also the cutting edge at the university. There’s lots of rhetoric about making research matter in practice. If [universities] want to live that, there has to be people working on the bridge. [SEARCH Faculty] are the change agents.”

“Universities talk about giving back to the community – and there’s also a huge push on interdisciplinary education. We’re showing that there are ways of doing”

A very positive development is SEARCH Canada's synergistic partnerships with the Centre for Health and Policy Studies at the University of Calgary, and with the Centre for Health Evidence (CHE) at the University of Alberta. The technological support provided by the CHE, combined with SEARCH Canada's expertise in helping organizations to use this technology in the support of decision-making 'on the ground' offers great promise. Health regions view the Desktop, as one person noted, "*With a gleam in their eye*", and this provides an entrée to the RHAs for both the CHE and SEARCH Canada. The synergistic relationship between the CHE and SEARCH Canada is further enhanced by the SEARCH Network, whose members act as advocates and accelerants for SEARCH Canada projects.

Challenges for Member Partners

RHA members also noted some challenges that appear to be consistent across the province. These include: i) challenges around selecting and supporting SEARCH Classic participants; ii) building awareness of, and support for, SEARCH Canada's programs and services among senior managers; and iii) gaining greater access to the Desktop and other technical resources.

Selecting and Supporting SEARCH Classic Participants

Each region appears to have its own process for selecting SEARCH Classic participants. The panel noted that where selection of participants is more strategic and involves senior management, SEARCH participation is most effectively leveraged for organizational benefit. Strategic selection of participants includes consideration of the leadership potential of possible participants and congruence of participants' project-related interests with regional priorities. A further important consideration is location of the participants within the organizational structure with the aim of building clusters of SEARCHers and other champions who can act together as a force for change. The panel observed that there was a greater organizational impact of SEARCH Canada involvement where such clusters and organizational support were present.

Another challenge for the health regions is the forty per cent commitment of participants' time to SEARCH Classic. While this amount of time is deemed reasonable for immersion in the program content, critical shortages of staff are making it almost impossible to backfill SEARCHers' positions, especially in more rural RHAs. Several participants noted they use personal time to complete SEARCH-related activities. Many regions opt to select participants in out-of-scope or non-acute care positions. In essence, this precludes SEARCH and RHAs from infiltrating more deeply into the level of front line practice, especially in acute care settings – a place where one might argue it is essential to foster a culture of evidence-informed decision making.

Fostering Senior Management Awareness and Support of SEARCH Programs and Services

The level of senior management awareness of, involvement in, and support of SEARCH programs and services varies from region to region. RHA representatives noted it would be most helpful to have SEARCH Canada leaders and faculty spend more time in regions talking about the benefits of the organization's programs and services. Several people described the success of having the SEARCH Canada CEO meet with their RHA board and senior management team with a view to looking for synergies between RHA priorities and SEARCH's offerings.

Gaining Greater Access to the Desktop and Other Technical Resources

The SEARCH Desktop is a hot commodity among RHAs. The panel consistently heard that SEARCH Canada could most effectively support the regions by making the Desktop more widely available. In addition, there were many requests for access to databases that would enable immediate access to published articles. Some rural regions also expressed the desire to develop closer linkages with local colleges.

Getting the Most from SEARCH Canada

Time and time again, the panel was struck by the value and potential of SEARCH Canada programs and services in delivering effective, efficient, high quality care. The panel feels strongly that RHAs are not passive partners with SEARCH Canada, and that it is important for them to continue to provide both material and financial support to the organization. Similarly, SEARCHers, past and present, are valuable assets to RHAs, and should be recognized accordingly.

The regions investing strategically in SEARCH Canada programs and services appear to be accruing the most benefits. The panel noted that those RHAs which appear to be getting the most out of SEARCH Canada's programs and services use the following strategies:

1. Keep the profile of SEARCH Canada high within the region and the community.
2. Spend more time elaborating how SEARCH Canada programs and services can benefit the *organization*, rather than just individual participants. Conceive of programs and services as an organizational development tool. Consider using SEARCH Classic participation as part of a recruitment and retention strategy, for example.
3. Select SEARCH Classic participants strategically, with the aim of building a critical mass of SEARCHers and supporters within the organization. Seek diverse participants who demonstrate enthusiasm and leadership potential.
4. Develop a network of SEARCHers – past, present – within the region and beyond; provide opportunities and resources for these people to interact, and to bring other organizational members into the network. Those regions with less SEARCH presence might consider bridging to other regions where SEARCH is well-entrenched.
5. Find ways to maximize the use of SEARCHers' skills and knowledge – protect their time so they can practice their newly acquired skills and knowledge.
6. Recognize the contribution that SEARCHers make to the RHA. Ensure they are fairly remunerated.
7. Recognize that SEARCH is not a solution to all that ills the region in terms of using research evidence to inform decision making.

Discussion and Recommendations

Achievements and Strengths

These are exciting times for SEARCH Canada and its member partners. The organization has experienced a great deal of success in its early years; the ten-year investment is now paying off. Progress is being made toward the objectives set out in the 2004-2009 Strategic Plan. Effective board governance and development mechanisms have been established. Member partners are enthusiastic about the benefits they are receiving from their partnership with the organization. Synergies between SEARCH Canada and the Centre for Health Evidence offer great promise for organizational growth and contribution.

In those regions with a critical mass of SEARCHers and responsive organizational leadership, organizational change is indeed beginning to occur. These regions are at a tipping point. Province-wide, critical mass is building as well. Coming from four different provinces, the panel members view SEARCH Canada's impact, even given the relatively small complement of SEARCHers currently dispersed throughout the province, as transformative. This degree of transformation is not occurring elsewhere in the country. Clearly, SEARCH Canada and its programs and services are working and should continue.

SEARCH Canada is unique in many ways, and this uniqueness is key to its ongoing success in Alberta and beyond. Specifically, the panel observed four strengths that appear to drive the organization's success:

1. *The people.*

The panel was struck by the energy, enthusiasm, and calibre of SEARCH Canada management, staff, faculty, and Board members. These analytical, thoughtful, humanistic people are leading by example. Similarly, the confidence, insight, and dedication of SEARCH participants and their managers was remarkable. These people came across as confident change agents with a good sense of self and knowledge of how to encourage change in the system. The heart of SEARCH Canada appears to be a well-developed capacity for building positive and collaborative relationships with member partners and stakeholders.

2. *A flexible, responsive, and customized approach.*

This is not merely an organization with some information technology tools and a canned training package. Rather, a core competency of SEARCH is helping organizations to use research and information *in practice* and thus to implement change on the ground in complex, political settings filled with competing priorities and demands. SEARCH Canada programs and services emphasize a flexible and practical approach customized to match local conditions and needs.

3. *The SEARCH Classic faculty and pedagogy.*

SEARCHers described the significant efforts that are made to build a safe, responsive community of people (including faculty) who can learn from each other. This approach embraces learners with diverse levels and types of skills and knowledge. The traditional faculty-student relationship does not exist in this pedagogy; rather, there is an appreciation of what each group can learn from the other.

4. *The technology and network infrastructure: SEARCH Custom and Network, Knowledge Services, the Desktop, and linkage to the Centre for Health Evidence.*

The panel sees that SEARCH Custom and the access it provides to technical resources can become instrumental in building a critical mass in the province in a relatively rapid fashion. RHAs want access to the Desktop, and pilot projects with the CHE in the Aspen Health Region, Peace Country Health, and The Capital Care Group, as well as work in the David Thompson Health Region, have revealed the eagerness of these organizations to embrace this technology. Such organization-wide efforts have huge potential to influence changes in culture and practices.

Challenges and Recommendations

Like any new organization, SEARCH Canada faces some daunting challenges that, if successfully navigated, will strengthen the organization and provide a foundation that can make SEARCH Canada an integral part of Alberta's health system. In particular, the panel identified four key challenges: i) how to ensure long-term financial sustainability; ii) how to expand activities within Alberta; iii) whether and how to expand activities beyond Alberta; and iv) how to engage and sustain a vibrant faculty over time. Panel recommendations for addressing each challenge are presented herein. In addition, recommendations regarding future evaluations of SEARCH Canada are offered. Finally, recommendations to regional health authorities for getting the most out of SEARCH Canada's programs and services are offered.

1. *Ensuring long-term financial sustainability.*

The panel is concerned about the organization's current plans for long-term financial sustainability. Some member partners noted, and the panel concurs, that cost recovery models for organizations like SEARCH Canada are insufficient for ongoing sustainability; such organizations instead require ongoing public funding. The review panel identified significant benefits for participants and member partners from SEARCH Canada (see above) that are clearly beneficial to a publicly-funded health system focused on the delivery of effective and high quality service. The panel reflected that SEARCH Canada is building a key component of the knowledge-based infrastructure needed by Alberta's health care system and that this requires ongoing support. As such, the panel came to the perspective that SEARCH Canada should be a fundamental element of Alberta's health system. In essence, the organization should be considered a public good, not a revenue-generating entity. Substantial public funds have been invested in SEARCH and SEARCH Canada over

the past ten years. But in order to continue to reap and extend the benefits described above, ongoing investments of public funds must be made. Thus, the panel recommends that, rather than relying on revenue generation from out-of-province services, SEARCH Canada should seek ongoing sources of public funding within Alberta. One way to do this is to articulate the full value of its programs and services, and argue that it is part of the basic infrastructure of Alberta's health system that significantly influences the delivery of health services on a number of fronts.

Recommendation 1:

View SEARCH Canada as an integral element of Alberta's health system and based on this, actively seek ongoing investment of public funding within Alberta.

Two strategies to assist in this regard include:

- 1.1. Fully articulate the value proposition of SEARCH Canada. The organization is producing much more than information technology or knowledge translation. It is viewed by many member partners as a highly successful organizational development tool.
- 1.2. Reconsider the language that is currently used to promote the organization. "Knowledge Unbound", for example, doesn't capture the essence of what SEARCH Canada truly offers. Different languages will open different doors. Strategic marketing with language customized to particular targets will help. Find out what member partners, particularly RHAs, need and show them how SEARCH Canada can help.
- 1.3. Increase awareness throughout the province of SEARCH Canada, its mandate, programs, services, and potential for enhancing service delivery in Alberta.

2. Expanding SEARCH Canada activities within Alberta.

SEARCH Canada leaders asked the panel for feedback regarding expansion of services in the province. They said, "*We think more can be done – but how and when?*" The panel heartily agrees with this sentiment, as did many member partners during the consultation process. Indeed, it is the feeling of the panel that strengthening the core of SEARCH Canada in Alberta should be its primary focus, certainly for the next three to five years.

Panel members heard from some member partners (and also discovered independently) that SEARCH Canada is not necessarily well-known, even in Alberta. Indeed, some people view it as a stand-alone niche organization. During the consultation process, one member partner noted that, like many government organizations, SEARCH Canada is not moving far enough or fast enough. And, it has been projecting the message, "*Come and join our great community*", rather than one that articulates the value and impact of SEARCH Canada on the delivery of health services. As described above, the organization has much more to offer than information technology or knowledge transfer, and therefore, should strive to be recognized as an integral component of Alberta's health system. The timing for this has never been better. Much progress has been made in the past ten years, and the panel sees that SEARCH Canada has both the experience and capacity to truly assist health organizations to apply research evidence in concrete, everyday practice.

Recommendation 2:

The major focus of SEARCH Canada should be on strengthening and expanding its programs and services within Alberta.

- 2.1. Strengthen communication with Alberta RHAs and other member partners. Make more efforts to be visible in the health regions. Specifically:
 - 2.1.1. Expand upon the current practice of having the SEARCH Canada CEO visit RHA boards and senior management with an articulation of how SEARCH can help the RHAs address their priority concerns.
 - 2.1.2. Facilitate SEARCH Canada Board-to-RHA Board interactions with the same intent as above.
 - 2.1.3. Facilitate similar approaches with other provincial bodies, such as the Council of RHA Board Chairs and the Council of RHA CEOs.
- 2.2. Engage managers, particularly those of SEARCH Classic participants, more fully. This might take the form of enhancing current levels of communication, inviting managers to some of the modules, giving them full access to the Desktop, or inviting them to be regular or guest faculty.
- 2.3. Develop and deliver “Mini-SEARCH” modules for staff and managers in RHAs.
- 2.4. Continue SEARCH Classic, and seek ways to build the complement of SEARCHers in the province more quickly. (One comment by a panel member was, *“If transformation is occurring as a result of 125 graduates, imagine what might be possible if there are 375 graduates?”*)
- 2.5. Expand SEARCH Custom, which offers a huge and as yet untapped potential to infiltrate every health region in the province. Current projects reveal the eagerness of regions to access SEARCH resources and programs, and the great success that can be had by enabling this. Clearly, this is a way of rapidly becoming more integrated into essential functions of health regions.
- 2.6. Offer the Desktop to all regions. A goal of SEARCH Canada should be to have this technology available to every worker within the next five to ten years.

3. Expanding SEARCH Canada activities beyond Alberta.

The panel heard about the organization’s discussions with other provinces, and the varied degrees of success to which these were met. While these ventures may not have been as successful as anticipated, the organization has nevertheless done some valuable reflection and learned a great deal from its experiences. It has become clear, for example, that SEARCH Classic is a complex program that has evolved organically and creatively in the province of Alberta, and as such, is not easily developed in other provinces and contexts.

The panel's message in this regard is that SEARCH Canada should focus, first and foremost, on providing and expanding services within Alberta. Expansion to other provinces should only occur where feasible, and where efforts to do so will neither dissipate the organization's energy, nor dilute its capabilities. This is not to say that activities beyond Alberta should not occur, but rather, that great caution should be taken in this regard. First steps for moving beyond Alberta might include consultations with other provinces, particularly to help people understand what SEARCH Canada has achieved, and also to offer selected programs, services, and tools. It should be made clear to others, however, that programs such as SEARCH Classic cannot be easily replicated in other provinces.

Recommendation 3:

Move slowly and carefully in terms of expanding beyond Alberta. Do not jeopardize the building of a solid foundation in Alberta by focusing on other provinces.

- 3.1. Start small. Consider offering small bits of SEARCH Canada programs, services, and technology in other provinces.
- 3.2. Continue to build relationships with like-minded faculty and organizational leaders in other provinces.
- 3.3. Consider distinguishing between a "SEARCH Alberta" mandate and a broader, more slowly and thoughtfully developed "SEARCH Canada" mandate as a forum for building capacity in other provinces.

4. *Engaging and sustaining a vibrant faculty over time.*

The panel was impressed with the calibre, spirit, and humanism of SEARCH faculty. Similarly, SEARCH participants spoke of their appreciation of faculty's free spirited, open approach, noting that they enjoyed the intellectually stimulating debates and dialogues that frequently take place among faculty and SEARCH participants at the modules.

There is concern however, about sustaining an ongoing supply of these passionate and skilled faculty over the long term, and that there is no apparent plan for doing so. There appears to be a strong reliance on individual personalities, particularly those who are passionate about SEARCH. But what might happen should these people decide to move on? A solid faculty is integral to the success of SEARCH Canada's endeavours. As such, finding ways to engage and sustain such faculty is a key challenge, and one that the organization's leadership recognizes.

Thus, any attempt to sustain a vibrant faculty must be done in such a way that the free-spirited ethos of "working in the white space" and the creativity and innovation this enables, is not stifled, yet that enough structure is provided to ensure an ongoing supply of qualified, credible faculty who fit in the organization.

One potential barrier to recruitment was identified as the requirement that SEARCH faculty commit 0.2 of their time to the program. This hinders the ability to engage a wider range of faculty who may not be able or interested in this level of commitment.

**Recommendation 4:
Develop a strategic and proactive plan for ensuring an ongoing supply of
enthusiastic, committed faculty.**

4.1 Work with universities to articulate the value of SEARCH participation for their academic mission and to provide more formal recognition of faculty engagement in SEARCH. Some possible strategies here include:

4.1.1 Emphasize the value of SEARCH Classic pedagogy. The flexible, responsive, adult-education based pedagogy is highly congruent with growing demands upon universities to bring research and practice closer together. Market SEARCH to universities and colleges as a win-win relationship through which more effective pedagogies can be developed. Encourage universities to consider SEARCH Canada engagement as part of faculty members' job descriptions, and evaluate performance accordingly. [Some current faculty members have succeeded in having their work with SEARCH Canada considered as community service.]

4.1.2 The conduct of evaluations that reveal organizational impacts of SEARCH Canada (see Recommendation 5) may yield more persuasive evidence that would entice universities to support faculty involvement.

4.1.3 Further explore faculty members' perceptions of what attracts them to SEARCH Canada and what they need in order to continue on.

4.2 Diversify the faculty. Two possible strategies are:

4.2.1 Engage faculty from Alberta's colleges. They are now mandated to conduct applied research, which means a good fit with SEARCH.

4.2.2 Engage senior managers from health regions as visiting or regular SEARCH faculty. This approach was endorsed by many RHA managers during the consultation process. Engaging managers will not only benefit SEARCH Canada, but it will also improve awareness of SEARCH and its value within RHAs – a mutually beneficial situation.

4.3 Re-think the traditional 0.2 FTE arrangement, be open to alternatives.

4.4 Continue to hire for 'fit' in order to preserve the intellectually stimulating and creative, flexible nature of the SEARCH community, and thus to continue to make this environment attractive to new and existing faculty/

4.5 Continue to maintain a solid core of university-based, actively researching and publishing faculty. This is crucial to the organization's credibility.

5. *Setting the foundation for future evaluations of SEARCH Canada.*

SEARCH and SEARCH Canada have expended tremendous effort on evaluation. This commitment to ongoing learning and adjusting is impressive. Yet, despite this intensive focus, evaluations have neither captured the gestalt of SEARCH and SEARCH Canada nor the benefits and outcomes for participants and member partners. While the impact of SEARCH Classic on individual participants has been well-documented internally, there is much less evidence of organizational and province-wide impacts. There has been relatively little external evaluation with the result that the SEARCH program and its potential benefits are not as widely documented in academic literatures.

Recommendation 5:

Focus now on broader-based evaluations that examine the impact of SEARCH Canada's programs and services on the organizations it serves.

Rather than conducting evaluations for internal consumption, consider the needs of external audiences to see and understand SEARCH Canada's impact and value.

- 5.1 In terms of internally conducted evaluations, be cautious about over-evaluating. Step back from frequent internal reviews, and take comfort in knowing that SEARCH Canada is doing well, particularly in regard to established programs and services. Use formative evaluations strategically. Reserve them for appraisals of new programs and services
- 5.2 Consider partnering with academic researchers to conduct arm's length evaluations in this regard. Disseminating the findings of these evaluations into the public domain (e.g. through publications) will provide greater visibility and lend further credibility.

Appendix One: Biographies

Expert Panel Members

Dr. Jeremy M. Grimshaw (Chair)

Director, Ottawa Health Research Institute, University of Ottawa

Dr Jeremy Grimshaw is the Director of the Clinical Epidemiology Programme of the Ottawa Health Research Institute and Director of the Center for Best Practice, Institute of Population Health, University of Ottawa. He holds a Tier 1 Canadian Research Chair in Health Knowledge Transfer and Uptake and is a Full Professor in the Department of Medicine, University of Ottawa. Prior to this he held a Personal Chair in Health Services Research at the University of Aberdeen, UK and was the Programme Director of the Effective Professional Programme within the Health Services Research.

His research interests can be grouped into three themes. Firstly systematic reviews professional, organisational, financial and regulatory interventions to improve professional and health care system performance. He is the Co-ordinating Editor of the Cochrane Effective Practice and Organisation of Care group (which currently has 38 reviews and 36 protocols), has undertaken reviews of guideline dissemination and implementation strategies and overviews of published systematic reviews. He has considerable experience of undertaking systematic reviews of complex interventions and has developed methods for searching for and assessing the quality of cluster randomised controlled trials and quasi experimental designs.

Secondly, he has considerable experience of the design, conduct and analysis of rigorous evaluations of dissemination and implementation strategies. He has conducted over 25 cluster randomised trials and two interrupted time series of different dissemination and implementation strategies. These studies have been conducted in a wide range of settings (including community pharmacy settings, family medicine settings and secondary and tertiary care level settings) and have evaluated a wide range of interventions (for example, educational meetings, educational outreach, organisational interventions, computerised guidelines) relating to a wide range of behaviours. The majority of these studies have incorporated economic evaluations. Through these studies, Dr Grimshaw has extensive experience of the design of dissemination and implementation strategies and methods to evaluate their impact.

The third area of work relates to methodological developments. Dr Grimshaw has undertaken methodological research into guideline development methods. He was Methodological Adviser to the Scottish Intercollegiate Guidelines Network and a member of the Guidelines Advisory Group for the National Institute of Clinical Excellence. He has also collaborated in the development of guideline appraisal instruments, initially the 'Cluzeau' instrument (rated most valid in an independent assessment of available appraisal instruments) and more recently the AGREE instrument. He also collaborated with the Southern Californian EPC on an AHRQ funded project to develop a framework for assessing when guidelines need updating and appraise the existing AHCPR guidelines. Dr Grimshaw has undertaken methodological studies of the design, conduct and analysis of cluster

randomised trials. He has also undertaken research into the applicability of behaviour change theories to professional behaviour and statistical issues in the design, conduct and analysis of cluster randomised trials. He has also participated in a number of international collaborations to support wider development of implementation research. He has also undertaken feasibility studies of different interventions.

Ms. Krista Connell
Chief Executive Officer, Nova Scotia Health Research Foundation

Krista is the Foundation's first Chief Executive Officer. Her job is extensive. She is responsible for providing the leadership and professional guidance necessary for the NSHRF to attain its strategic goals. Krista also oversees the tactical operation of the Foundation and ensures its effective and efficient operation.

As the Chief Executive Officer, Krista is also responsible for outreach to the research community in its broadest sense and for the development of policies and approaches that foster involvement and support on the part of stakeholders. Krista reports directly to the Board of Directors.

In addition to her duties as Chief Executive Officer, Krista is co-chair of NAPHRO (National Alliance of Provincial Health Research Organizations). She also serves as a member of the Institute of Health Services and Policy Research's Institute Advisory Board Partnership working group (CIHR), a member of the CIHR-sponsored working group on the development of a National Strategy for Cognitive Impairment, and a member of the Canadian Cochrane Network Centre Advisory Board. She is also an accomplished speaker who has been invited to present at national conferences as well as provincial and local venues.

Krista was born in Miramichi, New Brunswick. She is a graduate of Dalhousie University's School of Physiotherapy where she currently serves as an Adjunct Professor. In 1990, Krista received her Masters of Health Services Administration from the University of Alberta. She also completed a post-graduate fellowship with the Nova Scotia Department of Health.

Dr. David Low
President's Advisor on Public Health, University of Calgary

David Low joined the University of Calgary in late October 2005 as the President's Advisor on Public Health. Dr. Low brings extensive knowledge of national and international health care and health research funding, policy and governance. A native of Lethbridge, Alberta he has spent almost equal portions of his career in Canada and the US. He has been actively involved in Alberta's recent developments first as a member of the Mazankowski Commission, and now in spearheading the development of a pan-Alberta School of Public Health. Among his many distinguished achievements are: MD and MSc degrees from Queen's University; PhD. from the Baylor College of Medicine; Senior Medical Scientist Award by the National Medical Research Institute of France and the Medical Research Council of Canada; President and Chief Administrative Officer of the University of Texas-Houston Health Sciences Centre; Director of UT-Houston Center for Society and Population Health; and the first holder of the Rockwell Chair in Society and Health in the University of Texas School of Public Health. In 2004 the University of Texas created the David Low Chair in Public Health which will be held by the incumbent Dean of the UT School of Public Health.

Mr. Dwight Nelson

President and Chief Executive Officer, Regina Qu'Appelle Health Region

Dwight Nelson is President and Chief Executive Officer of Regina Qu'Appelle Health Region, a post held since 2002. Nelson previously served as Chief Executive Officer of the Headwaters Health Authority in Alberta for seven years. His health career also includes a four-year term as Vice President of the Alberta Children's Hospital and five years as Assistant Executive Director at a rural hospital.

Nelson is a Certified Health Executive (CHE) and has served on a number of provincial and national boards, committees and task forces over his 20 years in health care. Nelson served as Chairperson of the Council of CEO's in Alberta for two years, and as Chairperson of the Labour Relations Advisory Committee. He is currently on the board of the Association of Canadian Academic Health Organizations and was recently elected as the Saskatchewan Director on the Board of the Canadian College of Health Service Executives for 2005-08. Nominated by his colleagues in Saskatchewan and Alberta for fostering cooperation and collaboration to improve health outcomes, Nelson was recently recognized by *Canadian Healthcare Manager* as one of its *Who's Who* in Healthcare.

Nelson is a graduate of the University of Calgary (Bachelor of Arts) and also holds the professional designation of Chartered Accountant. He lives with his wife and two sons in Regina.

Researcher-Writer

Dr. Kathy GermAnn

Kathy GermAnn is an independent organizational researcher and writer. She earned her PhD in Organizational Analysis at the University of Alberta School of Business in 2006. As a doctoral student, she received an Alberta Heritage Foundation for Medical Research Studentship Award. In 2006, she was selected as a representative of the University of Alberta's top graduate students to present her research at the Canadian Institute for Health Research Annual Student Poster Competition. Kathy's primary research interest is in the humane dimensions of organizing, particularly the generation of well-being among organizational members and the dynamics that favour this process. Additional research interests include learning and change in organizations. Kathy adopts an interpretive methodology and a relational perspective in her work.

Kathy is a native Albertan, born and raised on a farm north of Edmonton. She is a graduate of the Royal Alexandra Hospital School of Nursing, and holds an undergraduate degree in nursing (University of Alberta, 1996) and a master's degree in health promotion (University of Alberta, 2000). Prior to her academic career, she worked extensively in Alberta's health system. An avid gardener, she lives with her family on an acreage near Sylvan Lake, Alberta.

Appendix Two: SEARCH Canada Mid-Point Review Terms of Reference

The purpose of the SEARCH Canada Mid-Point Progress Review is to conduct a formative evaluation of the SEARCH Canada organization. This mid-point review was requested when SEARCH funding was initially approved in 2004 and was to be conducted “at approximately the half way point ... during the calendar quarter of October 1st to December 31st, 2006” (Five-Year Strategic Plan 2004-2009 pg. 47).

1 BACKGROUND

In 1996 the Alberta Heritage Foundation for Medical Research established the SEARCH (Swift Efficient Access to Research in Community Health) program as a means to build capacity for applied research, knowledge transfer and research utilization in Alberta’s regional health authorities, and to build bridges between the academic and practice sectors. Since then over 125 persons participated in the SEARCH training and established a broad network to support increased collaborative research, evidence based decision-making and knowledge transfer in Alberta’s health services.

In 2004 SEARCH Canada was formally organized by its founding members to become a not-for-profit organization that could continue and build on its strong foundation of the SEARCH program, together with a complementary AHFMR-funded initiative called the Alberta Consultative Health Research Network (ACHRN). Although numerous evaluations have been conducted of past SEARCH programs (SEARCH I, II, and III cohorts for example, and the 2003 Organizational Research Capacity assessment) the Mid-Point Progress Review provides the opportunity to conduct the first evaluation of SEARCH Canada that includes SEARCH as an organization as well as the consolidated program initiatives.

2 AN EXPERT PANEL FORMATIVE EVALUATION

Several evaluation methods were considered as a means to accomplish the review: a participatory evaluation with member organizations, a standard-based evaluation format such as an accreditation process, and an expert panel review. The expert panel review is the preferred method of the SEARCH Canada board and management because it: a) utilizes the perspective of objective outsiders, b) draws from a wide range of perspectives common to SEARCH Canada members: Health Services, Universities, and Foundations, c) engages the SEARCH Canada organization in self-study and reflection about its programs, and d) follows a discovery process that promotes increased individual and organizational learning.

The following Terms of Reference describe the scope and details of the proposed Mid-Point Progress Review of the SEARCH Canada organization.

2.1 Evaluation Scope

The purpose of the evaluation is to review the progress that SEARCH Canada is making in the implementation of the Strategic Five-Year Plan 2004-2009, therefore attention will focus on the progress made between April 1, 2004 and November 1, 2006, building on the work from 1996–2004.

2.2 Expert Panel

The Expert Panel will review progress accomplished through the SEARCH programs. The panel will be comprised of persons selected by the Board of SEARCH Canada.

The Panel will be led by a chairperson who is a recognized international authority in research capacity development and funding, knowledge translation in health care, evaluation of grant funded programs, and an understanding of the Canadian and Alberta context.

A total of three to five persons will be selected, who bring a range of perspectives and understand the interests of member organizations. Additional criteria include:

- knowledge of social networks in health and information exchange
- knowledge about community and international development
- expertise in knowledge translation
- understanding of organizational issues in health care
- experience and recognition as a senior health care executive
- understanding of Canadian health issues and context
- knowledge about the role of informatics in research capacity and transfer
- expertise in organizational evaluation

The Expert Panel will be convened by the Chairperson during November of 2006 and will conduct appropriate document review, telephone consultation prior to November, a site visit, and interviews. At the conclusion of the review, the panel will share a debriefing with the SEARCH Canada Board and submit a report and recommendations within one month of the review. An additional resource may include a paper review by additional panel members, not involved in the site visit. This paper review would supplement the on site review and draw on additional expertise.

2.3 Evaluation Objectives

Specifically, the review is to address five areas:

- Determine if SEARCH Canada is implementing the Strategic Plan 2004-2009
- Assess the impact and challenges of the SEARCH Canada program for Member partners
- Describe progress in implementing efficient and effective Board Governance and Development practices
- Provide Feedback regarding the direction and revisions that will promote SEARCH Canada
- Provide a foundation for the evaluation guidelines for future organizational and program evaluations

3 DELIVERABLES

The deliverables must clearly outline the evidence for conclusions and recommendations.

3.1 Draft Final Report

The report should be 5-10 pages consisting of:

Executive summary: key findings, recommendations and lessons learned

Report:

- Findings: evidence collected, analysis, and associated data presented. This section should include some contextual background, but no more than 2 pages. A history of the program/context is not required.
- Conclusions including analysis of benchmarks and/or critical factors
- Recommendations and implications for future action

Appendices: as needed

3.2 Final Report

The Final Report will be as above but addressing any SEARCH Canada comments on the Draft Final Report. In addition, a copy of the report will be provided to SEARCH Canada either in a hard copy and/or available in electronic form.

SEARCH Canada will not make any changes to the substantive content of the report, but retains the right to request editorial corrections to the draft. Both the final and the summary report will be credited to the Expert Panel and potentially placed in the public domain at the decision of the SEARCH Canada Board.

4 LOGISTICAL SUPPORT

SEARCH Canada will provide preparatory and logistical assistance to the expert panel, which include:

1. Background materials (monthly reports, proposals, existing evaluations, etc.)
2. Identify/hire an administrative consultant for recording and draft development support for the expert panel members (administrative support persons will be asked to sign a confidentiality agreement related to their role in support of the expert panel)
3. Organize preparation meeting with SEARCH Board Chair and/or CEO
4. Provide list of stakeholders in each location and maps if necessary
5. Provide for and arrange transportation, lodging, etc.
6. Provide an honorarium of \$1000 per diem for each panel member as well as two travel days.

5 THREE-YEAR PROGRESS REVIEW TIME LINE

May-June 2006

Identify criteria and begin selection of Expert Panel

June-August 2006

Develop evaluation plan and review evaluation with Advisory Committee
Conduct document review and case studies

September-October 2006

Review, analyze, and prepare draft of evaluation findings
Send information and related materials to Expert Panel

November-December 2006

Conduct Three-Year Progress Review
Receive report of the expert panel

January-February 2007

Develop and distribute expert panel report and response to stakeholders