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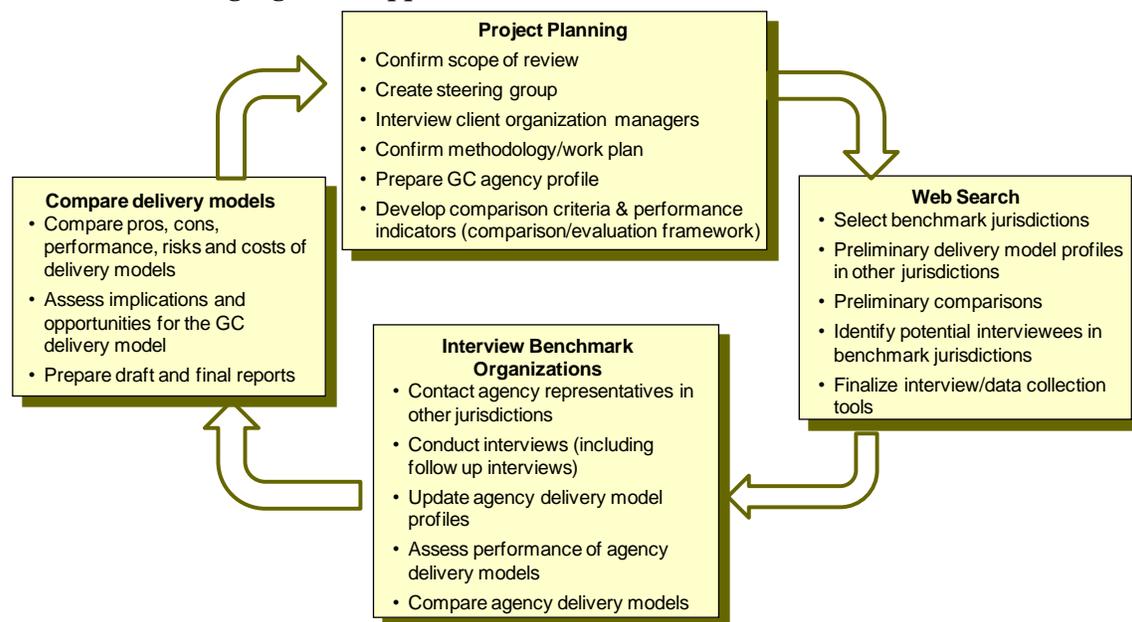
# Benchmarking Work Plan

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## Step 1— Prepare project work plan

We will hold a project kick-off meeting to ensure a common understanding of the study scope, and to review the project approach and work plan. We would update the project work plan and schedule as required. At this stage, we would confirm the purpose of the benchmarking study, the issues to be addressed, the potential benchmark organizations, and the most effective way to collect the information.

Although each benchmarking project is different, we have presented below an overall chart summarizing a generic approach.

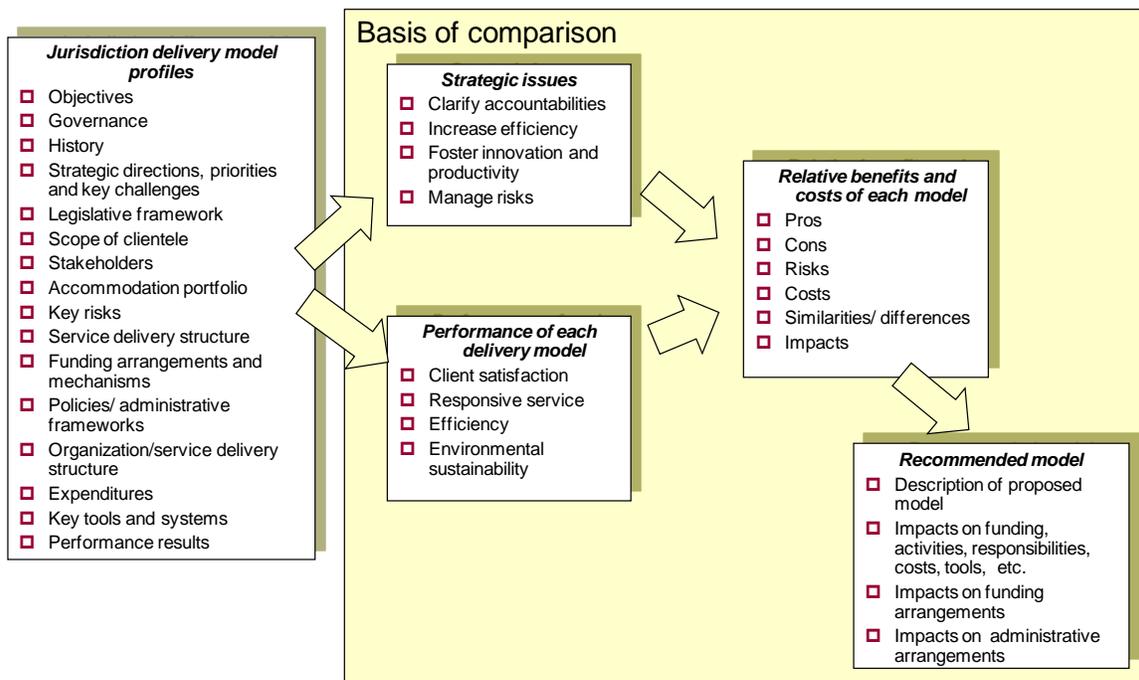


## Step 2— Confirm overall benchmark study objectives

An important step is to confirm with the project authority in the client organization the expected benefits of the benchmarking study. The project objectives could include, for example:

- Assess different service delivery models that are currently in place in other provincial or international jurisdictions
- Review the different models and compare them with the current Government of Canada (GC) model
- Make recommendations for improvement to the current GC model in support of increased efficiency and effectiveness.

An overall framework is presented below for illustrative purposes.



### Step 3— Conduct background web search and documentation review

We would conduct a review of information on the web with respect to overall trends and best practices and potential benchmark organizations in order to:

- Identify most suitable documentation that provides information on benchmark models within Canada and internationally
- Identify overall trends, issues and best practices
- Identify delivery models that exist and the delivery arrangements in place within Canada or internationally
- Begin to identify benchmark organizations that could be pursued to obtain comparative information.

### Step 4— Identify and select benchmark organizations

Based on the web research carried out and other consultations with sector experts, the availability of information, and the project budget available, we will select with the project authority the organizations to be benchmarked. Key considerations will include the willingness/interest of agencies in other jurisdictions to participate given other priorities, the willingness or potential reluctance to share information or provide detailed operating and cost information, or the extent to which contacts currently exist between the client organization and potential benchmark agencies in other jurisdictions.

## **Step 5— Identify key service delivery elements and criteria to be assessed**

It is essential to have from the outset a common understanding as to how we will compare the effectiveness and efficiency of the delivery models from the benchmark agencies, including the GC delivery model. For example, this framework would include:

- The common elements or criteria that will be used to describe the delivery model of each agency as part of the agency profiles referred to below, and that will constitute part of the comparison between models
- The extent to which each delivery model addresses the key questions or strategic issues of the benchmarking study
- A common list of performance indicators that will be used to assess the effectiveness and efficiency of each agency delivery model.

To develop this comparison framework, we would confirm overall government objectives with respect to the service being benchmarked, and specific criteria to be explored as part of the benchmarking. For example, these criteria could include service delivery arrangements in place in the GC and other jurisdictions with respect to:

- The scope of services provided
- Legislative framework
- Governance
- Delivery model
- Key stakeholders/clients within each jurisdiction
- Risk management
- Level of demand/workload
- Activities carried out, and the resources supporting each activity
- Productivity levels
- Skills and competencies
- Technologies, tools and systems
- Best practices
- Performance measurement and performance results
- Contracts with external service providers (e.g., time horizon, type, scope)
- Management of human resources
- Revenue and cost sharing (e.g., capital projects, operations)
- Financing/funding mechanisms
- Capital project planning and acquisitions
- Ownership of property, equipment, etc.
- Marketing of services to external clients
- External communications
- Quality assurance

## **Step 6— Prepare profiles of benchmark organizations**

Based on a review of web information available on the benchmark organizations, we will prepare draft profiles of the benchmark organizations. These profiles would be prepared in a consistent manner and structured as per the overall objectives and criteria that are relevant to the service being provided.

## **Step 7— Interview benchmark organizations**

We would arrange to interview the benchmark organizations to validate the agency profiles and collect further information on the existing and/or future service delivery arrangements, based on the criteria agreed upon. The main tasks would include:

- Prepare an interview guide and review with the project authority in advance of the interviews
- Identify the interviewees within each agency based on a web search or pre-existing contacts with the benchmark organizations
- Contact the interviewees to invite them to participate in the benchmarking study (this is typically done by the project authority)
- Arrange and carry out the interviews (most often by telephone)
- Based on the information collected, update the draft profile of each benchmark organization aligned with the agreed upon criteria
- Review and validate the draft profile with the benchmark organizations.

## **Step 8— Compare delivery models and identify best practices**

We would identify the different service delivery arrangements and business models in place, and compare practices that exist with respect to each of the criteria as outlined above. We would identify the advantages, disadvantages and risks of the various delivery models.

## **Step 9— Assess implications of findings for the client organization**

Based on the delivery models and best practices identified, and the comparisons between jurisdictions by criteria, we would assess the client organization model against these practices and identify potential opportunities for improvement and/or alternative delivery arrangements for future consideration.

## **Step 10— Prepare final report**

We would summarize the findings and recommendations in a report, including the results of the comparisons between jurisdictions by criteria. We would also prepare a presentation of desired. The detailed profiles of the benchmark agencies in each jurisdiction (including the GC) would be attached to the final report.

## **Step 11— Distribute report to the benchmark participants**

The project authority would distribute the benchmarking report to the benchmark agencies in appreciation of their participation in the study.