

1.16
Dumont Review

GABRIEL DUMONT INSTITUTE OF NATIVE STUDIES &
APPLIED RESEARCH



RESPONSE TO
THE GABRIEL DUMONT INSTITUTE REVIEW
CONDUCTED BY
THE BUREAU OF MANAGEMENT IMPROVEMENT

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GABRIEL DUMONT INSTITUTE OF NATIVE STUDIES & APPLIED RESEARCH

Response To
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Conducted By
The Bureau of Management Improvement

1.0 Introduction

1.1 Preface

One of the terms of the contractual agreement signed in 1980 between the Gabriel Dumont Institute and the Department of Continuing Education called for a program evaluation of the Institute to be conducted in 1983. Section 16 of the agreement stated that,

In consultation with the Institute, the Department, in January, of 1983, appoint an individual or individuals to conduct a comprehensive evaluation of the activities undertaken by the Institute pursuant to this agreement with a view to determining whether or not this agreement ought to be renewed.

In March of 1983 I was contacted by Mr. Eldon Wildeman of the Bureau of Management Improvement (BMI) who indicated that the Bureau, at the request of the Department of Continuing Education, would be conducting the review as per the contract. Mr. Wildeman indicated at the outset of his review activities that he would invite my reactions to a draft copy of the review prior to its submission to the (now) Department of Advanced Education and Manpower. I welcomed this opportunity, of course, and have decided to respond formally to the draft he provided me with; the present document represents my formal response.

1.2 Initial Comments

It seems appropriate to begin with a reference to the relationship between what I take to be the review's general conclusion and Section 16 of our contract (cited above), which identifies the ultimate goal of the review: To determine whether or not the agreement ought to be renewed.

My interpretation of both Mr. Wildeman's informal comments and the overall stance of the review draft is that the Department of Advanced Education and Manpower will, in fact, be advised to renew our agreement.

Mr. Wildeman indicated to me during his visit to the Institute that he was "impressed" with the Institute's operations and staff; the review document concludes that, in our relatively brief three-year history, we have "developed a strong program base" in four out of five mandated programs (Library, Research, Curriculum Development and Field Program). Because we have assembled a staff at the Institute which is a committed, industrious group, all of whom are proud of the Institute's performance to date, I cannot help but be pleased that the review, on balance, was positive to the extent that our Institute appears to have received the general approval of the reviewers. Both my staff and I feel, however, that we also have room for some major disappointments.

We believe that the research leading to the review's recommendations was extremely inadequate. Consequently, we see some rather glaring inaccuracies and misunderstandings of our mandate, our activities, and the distinctive policy environment within which we operate. The inadequacies of the research, I believe, produced some blatant flaws in the structure of the BMI arguments: In a number of cases, the recommendations (conclusions) were either inadequately supported by the documentation or were not supported at all.

I realize that the reviewers may have had time constraints which restricted their ability to probe our circumstances in great depth. The BMI review, however, will become at least one part of the official record of our performance; therefore, our serious concerns about its contents must also be recognized and appreciated by the Department of Advanced Education and Manpower and the Provincial Government generally. Quite frankly, there are a number of aspects of that record that my staff and I insist on "setting straight".

I do not wish to quibble over minor points, however; nor do I wish to give the impression that we are not willing to co-operate with the Department of Advanced Education and Manpower. Indeed, we agree with at least the spirit of some of the recommendations in the review.

We also sincerely wish to co-operate with the BMI and the Department in constructively pursuing improvements in our planning and operational activities. Our reasoning for wanting to co-operate with these agencies is straightforward: We want our endeavours to have a significant, positive impact on improving the quality of life for the Metis and Non-Status Indian people of Saskatchewan. We would like to assume that the Provincial Government, through its agency the Department of Advanced Education and Manpower, shares this motive with us.

My subsequent comments will be addressed to the following topics:

- a) the review's shortcomings; as perceived by the senior personnel of the Institute
- b) a statement of our negotiating principles for a contractual agreement for the continued delivery of our services.

2.0 Perceptions of the Review's Shortcomings

As I have indicated above, both my staff and I clearly perceive difficulties with a number of aspects of the review. In this section I will deal with some of our major concerns which, for convenience, will be subsumed under the following topics: The Review Process; The Appropriateness of the Methodology and, finally; Inaccuracies and Distortions in the Findings.

2.1 The Review Process

At the outset of the review it was indicated to us (to myself and Lyle Mueller on March 11, 1983) that a review advisory committee comprised of five members was to be established. The members of the committee were to be

Lyle Mueller, Gabriel Dumont Institute; Kenn Whyte, Gabriel Dumont Institute; Toby Stewart, Department of Continuing Education; Walter Charabin, Intergovernmental Affairs; and Dona Desmarais, Chairperson of the Gabriel Dumont Institute Management Board. We were told that this committee was to meet to establish a means of monitoring and advising the personnel conducting the review. To my knowledge, however, this committee was never convened; furthermore, to my knowledge, the Bureau of Management Improvement (BMI) did not attempt to convene this group or any other such group.

The negligence of the BMI in not establishing such a committee runs contrary to the statements of the senior BMI consultant and would appear to violate the spirit, if not the form, of the terms of reference of our contract. The contract states that, "in consultation with the Institute, (my italics) the Department, in January, 1983, appoint an individual or individuals to conduct a comprehensive evaluation...".

I was told that the review process was to begin with interviews of Program Heads in a 1-1½ hour session; then, based on this information, a second stage of the review procedure was to be implemented. The second stage was to include a detailed questionnaire, further interviews, and a closer examination of supplementary sources of data and information. Problem areas were to be identified in the first stage and more focus was to be given to these areas at the second stage. It appears, however, that the chief consultant chose only to conduct the 1-1½ hour interviews with senior program personnel of the Institute and gathered various comments on the general operations.

In the acknowledgements of the review draft it states that, "Gabriel Dumont Institute personnel were involved in the review by means of frequent consultations so that the understanding of proposed changes would be facilitated." In fact, it was never suggested to us that the review was

conducted to facilitate proposed changes. I find this distortion particularly disturbing because the report reads as if facilitating changes was a primary objective of the review. Surely an evaluation must not begin with the assumption that changes will be proposed prior to the conducting of the research.

2.2 The Appropriateness of the Methodology

I do not intend to engage in a complicated discussion (or debate) of "state-of-the-art" evaluation research methods. Anyone with even a cursory familiarity will be aware of the lack of scientific consensus on appropriate methodologies in the program evaluation and evaluation research literature. There are some rather basic difficulties with the methodology, however, in terms of the appropriateness of its application to a non-government organization such as ours that most reputable evaluation literature would clearly have to contest. Most of the evaluation literature would also be highly critical of the methodology employed in terms of its almost complete reliance on the extremes of subjectivity.

Fundamentally, I question the efficacy of the application of a methodology normally used to evaluate government programs to our organization — a distinctive entity operating within a particular organizational and policy environment. As the review states in the description of the Historical Background of the Institute (Section 2), our Institute came into being out of (1) the lobbying of AMNSIS (the democratically-mandated, representative organization of Metis and Non-Status Indian people in Saskatchewan) and (2) sympathetic (my word) negotiations with the Province.

I am pointing out that the Institute emerged out of a legitimate expression of interest by Native people in the province. It was also conceived through a formalized, systematic planning process (long-term, "strategic planning").

An AMNSIS consultant worked with the Assistant Deputy Minister of the Occupational Training Division and a staff person from the Social Planning Secretariat. The organizational structure which emerged was carefully designed to reflect Native concerns through close linkages with AMNSIS, yet with a board that operated as an incorporated entity, semi-independently of AMNSIS. The interests, experience, and wisdom of Native adult education students, Native women, the two Universities, and the Federal and Provincial governments were tied into the policy-making process by including representatives from all of them. The "free-standing" structure of the Institute conforms to a well-researched and carefully conceived organizational policy of AMNSIS. (See the Mason Report.)

The Institute has also acted as a support service to the Area Education Committees (AECs) in each AMNSIS region, developing a policy and procedures manual and providing board development training for them. We are also linked to the Area Education Committees through the Dumont Management Board. The Board has a regionally-representative NSIM sub-committee which has acted as a policy advisor to the AECs on such matters as staff relations and the setting of the funding formula for the regional division of the overall NSIM allocation.

I have gone over some of the formal components of the organizational structure and linkages to external organizations in order to point out how both the conception of the Institute as an organization and the policy environment within which it must operate, emerged out of a careful, culturally-sensitive planning process. The intent of that process was to ensure Native input, to conform to the goals of the Metis and Non-Status Indian parent organization and to routinize the ongoing input and guidance of government. In other words, there was nothing haphazard about the way in which the Institute emerged and its organizational structure came into being. Indeed, the Institute may well be one of the best conceived, non-government organizations in the country.

For a thorough understanding of the manner in which the Institute's services are systemically integrated with both government support services, the services of other non-government organizations, and the AMNSIS parent organization, the reviewers should have carefully examined the AMNSIS submission to the Department of Continuing Education on May 7, 1982, (entitled "A Historical Review of Native Adult Education Programming and a Comprehensive Plan for Native Adult Education Programming"). This document was submitted to the Department as an addendum to a Treasury Board submission and was prepared by senior AMNSIS consultants. Appendix 'A' of this response contains a diagrammatic representation of the Native adult education system.

It would seem only fair that a review of the Institute's program activities and management processes should have highlighted the impressive nature of the strategic planning processes out of which the Institute was conceived and its role was delineated.

I have also summarized the formal aspect of the organizational structure of Dumont and elaborated on how the Institute is situated within a broader educational-organizational environment, in order to stress some of the structural constraints on planning that confronts the organization internally. The Institute can only be very superficially understood if it is not described and analyzed in terms of both its relations to other systems and to the impact of various decision-making bodies on the Institute.

The evaluation research literature strongly suggests that appropriate evaluation methods for assessing established programs are those that stress the feedback of a continuous stream of information into the ongoing program. Such models have been called process models; their major development has been in the field of operations research.

Underlying the operations approach to the organizational analysis of programs is the belief that modern complex organizations are characterized by "the study of relations rather than 'entities' with an emphasis on process and transition probabilities as a basis of a flexible structure with many degrees of freedom."* The emphasis in such models is upon an adaptive system, as opposed to equilibrium or homeostatic models, and describe, "a complex of elements or components directly or indirectly related in a casual network, such that each component is related to at least some others in a more or less stable way within any particular period of time."** The process that must be described by such models is one of continual operation and constantly changing responses to external as well as internal pressures. As one writer states,

It is clear that evaluative research within such a system cannot meaningfully carve out a single segment of the process for evaluation as a self-contained unit. The separate component per se is not as important as its relationship to other components and can best be evaluated as an inherent part of the ongoing system. The parts of a total system, i.e., health, education, welfare, are not independent, stable permanent structures but rather interrelated, alterable and temporary, subject to the workings of the system as a whole with changes in any part of the system influencing other parts of the system.***

It appears to me that there was little attempt to appreciate the complexities of the relations between the Institute and various organizational components external to its own decision-making arena. If, for example, the reviewers had examined the planning processes and

* See Buckley, Walter. Sociology and Modern Systems Theory. Englewood Cliffs, New Jersey: Prentice-Hall, Inc., 1967, p. 39.

** Ibid.

*** See Edward Suchman, "Action For What? A Critique of Evaluative Research", in The Organization, Management, and Tactics of Social Research, edited by Richard O'Toole, Schenkman: Cambridge, 1970.

developmental processes involved in establishing Area Education Committees and creating linkages between the Institute and those Committees, the review would have been forced to describe the complex nature of the planning and management environment within which we must operate.

A series of formal and informal linkages between the Institute staff, Management Board, two levels of Government, and Native organizations at the Area level are but some components of the communication and decision-making system that are operative. I am not attempting to suggest that the organizational or policy environment in which we work is too complex. I am simply trying to suggest that a serious evaluation of our internal planning processes would have to conceptualize an investigation which took these other aspects into account before passing judgement on the effectiveness or ineffectiveness of our internal planning. Any reviewer who is familiar with the operations of Native organizations will realize that any professional organization operating under the authority of Native leadership is both closer to the grassroots people and more fully exposed to and constrained by alternating political currents than is a government department or educational institute in the non-Native system.

I assure you that I am not complaining about our lack of freedom in planning and conducting our activities. I make these points simply to indicate that a serious review of our performance must take these into account. Indeed, it is my belief that Native organizations have tended (at least in the educational field) to perform significantly better than non-Native controlled educational institutions serving Native people because of their more direct linkages to the Native community.

We were told that the BMI staff would review our Institute in terms of the following specific areas:

- the extent to which the Institute operated within the terms of its "mandate"
- the effectiveness with which the Institute has fulfilled its mandate (i.e., its performance)
- the openness and effectiveness of the Institute's communications both internally and externally (with Continuing Education, AMNSIS, etc.)
- the effectiveness of the Institute's finance and budget control system
- the appropriateness of the budget/planning system for the Institute's programs.

I fail to see how, given the methodology described to us and the conceptual approach taken (as indicated by the narrative in the draft copy of the review), the reviewers could feel comfortable in criticizing or recommending changes with reference to the first three of the above categories. The methodology selected was extremely insensitive to the political realities within which we must operate; in short, it was a methodology which may fit a government department, but does little justice to our particular organization.

Finally, I should point out that I was disappointed with the extent to which the reviewers relied upon the extremes of subjectivity in conducting this evaluation. The chief consultant states that "the Bureau of Management Improvement found that the Institute had little useful data for evaluating how effective its services were in meeting the needs of the target groups." In some of the Sections, the consultant drew upon data from outdated documents rather than updated documents which more accurately reflect recent developments and situations. I question why he chose to ignore the updated documents which were presented to him. I firmly believe that there is a wealth of information sources which could easily have provided a data base for a descriptive document that would accurately shed light on the activities of the Institute's operations and programs.

Consequently, this unnecessary subjectivity led to highly generalized statements, a paragraph or two in length, on each of the programs. Vague remarks like "significant input into the original mandate" (pg 16); "implemented to a degree" (pg 19); "reasonable base established" (pg 21); "major contributions" (pg 24) were substituted for precise conceptualization and objective, supportive evidence.

2.3 Inaccuracies and Distortions in the Findings

In examining the review document our staff discovered a number of conceptual misunderstandings, inaccuracies of fact, and statements which, in our view, reflect distortions of the truth. I will cover these in some detail.

On Page 2 of the draft copy of the review, Part III of the report is described as a review of the Institute's performance. It is stated that,

This section is the independent and objective (my italics) assessment of the Institute's performance to determine the adequacy of its mandate, objectives, design and results, both intended and unintended.

According to the above statement, the section referred to (Part III) must be taken very seriously, for it provides the basis in evidence for some of the major recommendations and conclusions of the review. I find the "objectivity" of this section to be sorely lacking.

2.3.1 Mandate

The distinction the consultant makes between the mandated and non-mandated programs seems to be deliberately left unclear. One assumes, however, by reading between the lines, that the chief consultant interprets this distinction as being between whether the funding came from the Department of Continuing Education or the funding did not come from that source. On various occasions, however, the inference is that a mandated program is a "sanctioned" program as per the five functional areas outlined in the contractual agreement. We are left to our own interpretations here, because there

are not any parameters, distinctions, or definitions given or suggested as to whom, what group, etc., gave the mandate or for what purpose, in what context, under what constraints, etc., etc.

This lack of clarity leads the consultant to inconsistencies. The most obvious example concerns the NSIM program. On Page 24 the review questions whether the Institute should have done any research on the NSIM or Community Education needs. As cited on Page 14 of the document, our agreement includes the operation of "a research department responsible for cultural, historical and sociological research and evaluation. This is to include oral history and researching specific problems and needs of Native people". Frankly, it completely escapes me how research into the NSIM program or Community Education needs of Native people does not fit into the terms of reference of this "functional area", i.e., "researching specific problems and needs of Native people". Indeed, on Pages 29-32, the review notes in some detail, albeit in a confused manner, that this very activity was, in fact, a "mandated activity".

It may be true that the agreement with the Gabriel Dumont Institute entered into by the Department of Continuing Education was very general (bottom of Page 15). The reviewers should have been aware that such general statements are part-and-parcel of conventional statements of purpose for most contracts with non-profit corporations. To assign the cause of varying interpretations of our mandate to this conventional generality, however, (as stated on Pages 15-16) is a curious conclusion because it lacks any supportive evidence. The writer goes on to say (on Page 16) that, "there appears to be a serious lack of understanding of the functional mandate as outlined in the agreement by the Native public, AMNSIS membership, government organizations, the educational community, and the general public". The consultant also states that various organizations (unnamed) have conflicting interpretations of the mandate of the Gabriel Dumont Institute — some believe that the Institute is only to conduct research

and develop education-related programs; others see the Institute as an educational delivery agency, and economic and community development strategy-producing agency; others question the collection of data for AMNSIS on planning and administration of the NSIM program.

In the absence of the review's identification of the groups which hold these divergent interpretations, it is difficult to evaluate the accuracy of these statements. One must question the very relevance of the statement that there is a "serious lack of understanding of the functional mandate" by various organizations, however. Any random sample of the general population's understanding of the functional mandate of any major public or private agency in the country would reveal a "lack of understanding" of those organization's functional mandates if one were to compare the opinions polled to the legal criteria which formally defines the mandate of those agencies. But what constitutes a "serious" lack of understanding? The review provides no criteria by which one can objectively separate the problematic status of conflicting understandings from the unproblematic, routine expectation that, normally, the formal mandate of any organization will be misunderstood.

In the absence of a clarification of the reasons why the reviewers assume that conflicting ideas about the Institute's mandate is a problem, I find myself suspicious that there is an unstated motive. My suspicions spring from some inaccuracies and distortions in subsequent statements. For example, the reviewers indicate that several groups have questioned whether or not collecting data on the NSIM program is within our mandate. As indicated previously, these groups are unnamed, and I believe I have already demonstrated that this function is clearly within the mandate of our program. The consultant also suggests that not only have we made a significant input into our original mandate, but we have

exceeded it by offering such programs as Project Development that were not part of our original agreement. Frankly, I cannot think of anything we do that falls outside of the original mandate of the Institute. It should be recalled that we are (according to the contract) to:

- (i) support Native people in developing a knowledge of and pride in the history and culture;
- (ii) support programs and activities which bring about an increased understanding and appreciation of Native culture among non-Native people.

The reviewers also indicate that we have offered programs such as Project Development that were not part of the original agreement. In point of fact, Project Development is not a program separate from the functions of the Institute but is integrated within every other program; everything we do has a developmental phase which necessitates extra resources and, in some cases, specialized focus amongst our daily, ongoing activities, thus the need for leadership in major project developments. This example suggests a further shortcoming of the review: The failure of the reviewers to specifically define the conceptual differences between programs, functions and goals.

Another example is the suggestion that we are "exceeding" the terms of the agreement by offering such courses as the delivery of ABE classes, and Native Studies to inmates in correctional centres. In the first instance we are clearly not delivering ABE classes; in the second, Native Studies presentations, as conducted by the field staff, are completely within the mandate of the Institute. Such presentations are clearly "supporting Native people to develop a knowledge of and pride in their history and culture".

The superficial discussion of the Institute's mandate (and the inaccuracies identified above) have made me suspect that the reviewers were instructed to reinforce the idea that the Institute not be involved in the direct delivery of educational programs. I believe that the entire question

of delivery should be reviewed with the Department of Advanced Education and Manpower. I must say, however, that, at this point, the Institute is not involved in the direct delivery of courses, if delivery is intended to mean actual instruction and certification. This whole question remains an area of some controversy, however, because it has been made clear by Metis and Non-Status Indian people that they would like the Institute to be involved in direct delivery.

If we assume that Provincially-mandated programs operated by the Institute are restricted to those funded by the Department of Advanced Education and Manpower for core services, there is clearly no utilization of Provincial funds for the "delivery" of programs. The SUNTEP program operates under a separate contract and a specific affiliation formula with the universities. The STEP program will utilize provincial institutions as the source of instruction and certification. The currently proposed Native Studies Instructors course to be offered by the Institute will not be funded by the Provincial Government, and its delivery will not be at the expense of any activities related to our Provincial mandate.

The point should be repeated that, because of the distinctive nature of our larger organizational environment and the unique needs of our clientele, the Institute must be flexible at the operational level if it is to satisfy the terms of reference of its general mandate. Clearly, any agreement that the Institute enters into for funding should reflect the need for this flexibility.

I find myself rather perplexed at the obvious misunderstanding in the BMI review of both the organizational history or conceptualization of Community Education and Native Studies. The report indicates that these are separate entities from certain mandated programs.

The consultant failed to note that after careful study, conferences, and internal staff and board meetings, we arrived at the conclusion that Native Studies is a core of everything the Institute does. In short, we found that there is nothing we do that does not relate or include Native Studies.

Similarly, Community Education is organized as a general function of our Institute rather than as a specific program; everything that we do serves our constituents in the community in some way.

2.3.2 Planning and Management Approaches

If the consultants had probed just a little more deeply into our management structures the mistakes cited above would not have been made. The consultant would also have described our management system as one focused on functional program approaches designed for maximum flexibility in an ever-changing, dynamic milieu; yet the BMI team appears to have viewed the Institute's management structure as if it were or should be a textbook bureaucracy. In fact, given our organizational environment in the broader context, such an approach is not plausible. The generalized statements about interconnections on Pages 56-57, which provides the only core background to Recommendation #15, are thus, at best, superficial and, in fact, fly-in-the-face of what our experience has suggested to us is an extremely effective approach.

The BMI team appears to have given very little serious consideration to what Community Education really is. The statement on Page 29 indicates that the evaluators somehow believe that education can be separated from economic and societal concerns. Surely this is a most naive and narrow perspective on the role of education in society, particularly the role of an educational institute that has been established precisely because of the economic and societal problems of the people it serves.

I would also take exception to a number of statements made about the planning of the Field Program. Let me begin with the description of the program on Page 10 of the report.

The evaluators were given a copy of the job description of the Field Staff positions and a detailed task analysis. They apparently chose to ignore this description and instead used information that has been outdated since May, 1982. It should also be pointed out that despite the description of the program as being staffed by six field positions, we have not had six positions since February, 1982. The evaluators also included information which was deleted in May, 1982, as it overlaps with the AEC Co-ordinator positions (#5 and #7 of the description). The changes made to eliminate this overlap was clearly dealt with in the task analysis that was thoroughly discussed with the Field Staff. Statements made near the bottom of Page 28 about the problems of the Field Program appear to rely almost exclusively on a report by David Cowley that was written in May, 1981.

It is difficult to understand how the evaluators concluded that the Field Program functions and roles are still unclear. The evaluators were given a copy of the job description/task analysis for the Field Staff positions. The supervisor (Program Co-ordinator) conducted an extremely thorough task analysis/role clarification for Field Staff positions. Her approach was, quite frankly, "state-of-the-art", given her simultaneous study of this very methodology in the Graduate Studies Program in Adult Education that she is currently enrolled in on a part-time basis. The purpose of a task analysis is, in fact, to ensure absolute clarity in work positions.

I take strong issue with the statement that, "staff for the most part were concerned about the lack of a planning process". All Program Heads who were interviewed have denied that they would or did make statements supportive of such a sweeping conclusion. No one can even recall the consultant addressing this issue in any detailed manner. If this had

been pursued in any depth, the BMI would have found abundant information on formalized planning procedures as well as numerous planning activities for specialized project initiatives. The BMI would also have found that Project Development is not a program separate from the functions of the Institute but is integrated within every other program. Everything we do has a developmental phase which necessitates extra resources and, in some cases, a specialized focus by a number of Institute staff acting as a team for brief periods of time. Given the fact that we must co-ordinate the activities of a number of staff during the developmental phase of a project, we find that it has been useful to assign a Program Director to specialize in the leadership needed for major project developments.

In summary, we have a multi-faceted, integrated system which actually reflects the daily and ongoing activities of the Institute and, at the same time, allows for flexibility in new initiatives. We have found that this approach works exceedingly well in our situation which, as indicated, is one which presents us with many constraints, ever-changing variables and a cross-cultural environment.

The section dealing with Evaluation also fails to look at any of the sub-objectives or any documentation from Annual Assemblies, Annual Education Conferences, or Board Meetings, all of which have generated resolutions and guidance relevant to program and budget decisions. We regard these policy inputs as both legitimate as a general principle and as legally faithful to the terms of reference of our contractual agreement with the Department. As stated in the contract, one of our two goals is to "support Native people in developing a knowledge of and pride in their history and culture...". Clearly Native people give formal expression to their ideas about developing historical and cultural knowledge and pride at the AMNSIS Annual Assembly, the Annual Education Conferences and through the Dumont Institute Management Board.

Frankly, I am mystified by the assumption that an objective review of our management procedures could be undertaken without looking in detail at the decision-making process and some of the principal actors involved. I also fail to see how, in the absence of an examination of the secondary objectives or the sub-objectives of the Institute at a program level, the recommendation that, four out of five programs will all "require further planning, and evaluation in order for them to be developed to an acceptable (sic) level", could be made. I take strong exception to the fact that the criteria for defining acceptability were not delineated and that the very impressive efforts of our programs in these areas were so easily dismissed without documentary support.

2.3.3 Linkage of Institute Activities to Societal Problems

The review indicates that there isn't any link between the operations of the Institute programs and societal problems. I find myself in total disagreement with this judgement and I share this opinion with the remainder of the Institute staff.

We have repeatedly noted and argued that Research, Curriculum Development and Library services alone will in no way affect the societal and economic positions of the Metis and Non-Status people of this province. These programs can only act as resources to support educational activities where the learner is present and where legitimate, certified training programs with appropriate support systems, curriculum and teaching processes are in place. We have made this position clear to government through various formal presentations and can only assume that, if government is listening, our position is well-known.

At the present time the SUNTEP program is the only major training program fully utilizing the fruits of the wisdom we have acquired in our experience in the Native educational field. We have no means other than persuasion,

however, to facilitate the development of the mechanisms we know are required to significantly impact on the societal problems experienced by Metis and Non-Status Indian people in the province. We need the co-operative assistance of the Provincial Government to accomplish this.

2.3.4 Funding History, Procedures and Proposed Improvements in Finance/Administration

The description of the Institute's Core services funding history and funding arrangements (Page 12 - 2.4) is inaccurate. The funding contract for Core includes both Native Studies and Community Education, not as specific programs but as functions of all Institute programs. The other items mentioned, including Research (both historical and contemporary social and cultural research), Curriculum Development, Library/Education Resources, and Field Services are all programs which operate from the framework of specific organizational units. Specific funds are not allocated in such a manner that it could be assumed Native Studies has a full-time staff assigned to it.

In addition, as opposed to what is indicated in Section 2.4 of the BMI review, the entire finance/administration operation is not funded by Core, but by portions of Core, SUNTEP, Consulting and by any other programs we may get.

Our finance/administrative staff take strong objection to Section 4.1 (i), Page 41, dealing with planning, especially to the extent that it pertains to their involvement and work activities. To quote from our Accounting Manager:

The only questions raised to me regarding 'planning' related to budget. It was explained that Program Heads played an active role in planning and preparation of budget submissions and expenditure plans. Planning processes for strategic and operational levels were not discussed.

Curiously, despite the inference in the review that we might improve our financial reporting procedures with automation, this impression is contradicted by Recommendation

#7. The readers of the review should also be aware that we have thoroughly examined automation ourselves and that we indicated this to the reviewers.

2.4 Summary

In summary, while our staff has interpreted the BMI draft as a general statement of support for the Institute, we were very disappointed with the review process, the research and the details of the product which emerged from it. I should point out that the staff found a number of other inaccuracies in the review that time has not allowed me to detail. Our most general disappointment, however, was with the lack of supportive evidence for the recommendations. In any future review, we would like to have significantly more input into both the design of the methodology and as respondents.

An evaluation should provide its subject with both the opportunity and the substance for collective self-reflection. As indicated above, I wish there was considerably more substance in the review to aid us in our self-appraisal. We must, of course, take this opportunity to respond constructively to the major recommendations in the review. It is in this spirit that I will set out some general principles which, I believe, should establish the foundation of our new contract with the Department of Advanced Education and Manpower.

The framing of the principles outlined below was developed, in part, with reference to some of the BMI recommendations. It will become obvious that my staff and I have, in fact, given careful consideration to these recommendations. We have also found some of the recommendations to be constructive, despite our disappointment with the superficial linkage between the background research in the review and the concluding recommendations. It should be made clear, however, that the principles outlined below

derive far more from the informed position and integrity of intentions that have typified our Institute's activities as an educational agency than they are from the BMI recommendations.

3.0 A Proposed Set of Negotiating Principles for a Contractual Agreement Between the Gabriel Dumont Institute and the Department of Advanced Education and Manpower

3.1 The contract should include a statement of the following:

The goals of the Institute are (a) to support Native people in developing a knowledge and pride in their history and culture as part of a strategy for strengthening Native adult education programming; (b) to develop programs and services which would complement and strengthen the existing initiatives in Native adult education designed to prepare Native people to participate in meaningful job opportunities within the Province; (c) to help develop programs and services in the area of cross-cultural education, designed to bring about a better understanding of and appreciation by non-Native people of Native culture and of Native contributions to the larger culture.

3.2 The composition and terms of reference of the responsibilities of the Management Board of the Institute should remain the same as Section 15.1 and 15.2 of the 1980 Contract.

3.3 The contract should include a statement of the functional areas of Institute activities which would read as follows; the Institute will:

(a) conduct cultural, historical and sociological research and evaluation of relevance to the needs of Metis and Non-Status Indian people in Saskatchewan;

(b) through its Library and Resource Centre, organize and make available research materials, literature, visual and audio aids to the Association of Metis and Non-Status Indians of Saskatchewan, to Native people in local communities, and to non-Native institutions and the general public;

(c) conduct educational resource development activities in order to increase the availability of such materials as study guides, articles, slides, film strips, films and other similar educational resources which can be used by both Native and non-Native people, with special emphasis on providing these materials for all levels of the formal educational system;

(d) at the community level, provide support in the form of administrative services, educational resources and advice to aid Metis and Non-Status Indian people in their attempts to develop programs and activities aimed at improvements in their quality of life.

This section in the contract should replace Items 2 and 3 of Appendix A (attached to the previous contract). This restatement of functional areas will serve to clarify the obvious misunderstandings of our mandate that is reflected in the BMI review; it also will serve to delete the now defunct Community Consultation Program cited in Item 2 (d) of the Appendix, and clarifies, in a broad sense, the intentions of our Community Education function.

We believe that this restatement of our functional areas will eliminate any current misunderstandings of our management approach by agencies of the Provincial Government. It will also make clear the distinction between our functional areas, our programs, and the organizational departments and units within our overall management structure. We believe that these distinctions are essential because they serve to reinforce the adaptive style of management that we have found necessary to our effective operation in a complex, dynamic political situation that is sensitive to the democratic representation of Native people and to a cross-cultural environment.

3.4 The contract should specify that a formal liaison structure with the Department of Advanced Education and Manpower be established. Such a structure should include senior officials of both the Dumont Institute and the Department (including elected officials and senior staff).

The group suggested should meet on a regular basis. It should also have the authority to designate other staff to meet on an ongoing basis to resolve questions relating to the details of practical matters and concerns of mutual interest to both the Department and the Institute.

In making this recommendation we are supported by Recommendation #7 (Page 32) of the review. We believe that such a structure could be effectively utilized not only to develop an increased, mutual level of awareness of the functions of both parties, but also to facilitate more effective joint efforts to serve the needs of Metis and Non-Status Indian people in Saskatchewan.

We believe that the liaison/communication system we envision could afford us the opportunity to demonstrate that, despite the paragraph at the bottom of Page 66 of the BMI review, the Institute does, in fact, have clear and precise detailed program guidelines which specify the roles and responsibilities of our program unit and staff. We would also be able to indicate to the Department that the requests we are said to have a "tendency to...respond too quickly to" are legitimate, and do, in fact, require a rapid response. Such a liaison structure would also allow us to, on occasion, enlist the aid of Department resources in order to ease the burden of our admittedly rather heavy load of requests from our constituents.

It should be noted that one of the reasons that the "hastiness" of our reaction occurs is because of the nature of government itself. Both Provincial and Federal Government agencies tend not to be open enough in providing us with information in sufficient lead time for adequate preparation. Jurisdictional conflicts between Federal and Provincial Governments are another obvious source of inhibition on ideal planning processes.

Our developmental function is a particularly difficult one because of a lack of flexibility in the time

frames (i.e., deadlines, etc.) of Government reviews, approvals and funding for projects. Yet clearly we are an educational development agency and must, in this role, work within the programming and proposal-development parameters of funding sources, both public and private.

3.5 We would like to discuss in some detail the specific nature of what the Department would have in mind if they accept the BMI recommendation that a strategic planning document be developed. We would want such a document to emerge out of open and candid discussions with Department officials and would want to have major input into the design of such a planning document.

While we recognize that "quantifiable and verifiable objectives for all programs" can in many ways provide useful benchmarks for strategic planning, we are also aware that (1) the testing of our program performance is, in many ways, not easily subjected to assessment against quantifiable objectives* and (2) we would want to ensure that our strategic planning processes continue to reflect the distinctive nature of our democratic, political/cultural policy input system and (3) that our strategic planning document not force us to engage in overly time-consuming, make-work planning activities that would deter us from our primary objectives.

3.6 Frankly, we are not sure what the BMI means by a "regular review" of management and mandated programs and activities by the Planning and Evaluation Branch of the Department of Advanced Education and Manpower. We would recommend that the formal liaison/communication system established between the Department and the Institute should act as an ongoing evaluation mechanism.

* In the three months taken by the BMI team there was not even an attempt to "quantify" or "verify".

It would seem logical that such a mechanism would allow for an open flow of reliable information; it would also facilitate more understanding on the part of both parties (the Institute and the Department) than would any annual review of the type that puts us in the demeaning role of the teacher on the proverbial day of horror when the School Inspector visits the classroom. To ensure that objectivity is maintained by the Department members assigned to the liaison group, the Planning and Evaluation Branch could well play a very useful advisory role in designing the nature of the liaison system.

3.7 We find ourselves somewhat "up-in-the-air" about the Department's intentions regarding the future of the Native Employment Services Group (NESG) program and its relationship to our role in the Native adult education system. We have similar feelings about the status of the Area Education Committees, AEC Co-ordinators, and other potential staff at the Area level. Because one of our prime functional areas is community education, we believe that clarification of the Department's intentions concerning the roles of these various staff and system components is urgently required. We would like to have a major input into defining our role in supporting the AECs (or Area Boards) and the staff of Area decision-making bodies that deal with educational and training activities. We strongly believe that the expertise and commitment of the staff we have assembled can be (and has been) a vital support to committees and staff at the Area level.

APPENDIX A

Diagrammatical Representation of
Native Adult Education System

Appendix A - Diagrammatical Representation of Native Adult Education System

