

GUIDE

Building a Metrics & Reporting System for Your Community

A practical, step-by-step guide for First Nations program staff. From deciding what to measure to presenting results with confidence.

FOR

Employment Coordinators · Program Managers · Band Administrators OW Delivery Agents · Tribal Council Staff ·
Community Program Leads

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What's in This Guide

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Step 2 Set up your data collection system

Step 3 Build your reporting framework

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Reference Tables Key metrics, formulas, and definitions

**OCAP® & Data
Sovereignty** Keeping data where it belongs

Custom Support When to get help from IPC

NOTE

This guide is designed for communities of any size — from single-coordinator band programs to large tribal council delivery agents serving multiple Nations. Adapt what fits and leave what does not.

Introduction

Every community program collects some form of data — intake forms, attendance sheets, case notes, employment placements. But collecting data and having a reporting system are two very different things.

A well-built metrics system does three things:

- Tells you whether your program is actually working — not just how busy it is.
- Gives you credible evidence to protect and grow your funding.
- Puts your community in control of its own narrative — rather than having provincial or federal funders define success for you.

WHAT GOOD METRICS DO

- Show real outcomes, not just activity
- Tell a story funders and leadership understand
- Identify gaps before they become crises
- Build trust with your community
- Give your team something to celebrate

WHAT TO AVOID

- Measuring everything and understanding nothing
- Collecting data that only serves the funder
- Reporting numbers without context or narrative
- Building systems so complex no one uses them
- Sharing community data without consent protocols

OCAP® PRINCIPLE

Data about your community belongs to your community. Before building any reporting system, ask: Who owns this data? Who can access it? Who benefits from it? These are not bureaucratic questions — they are sovereignty questions.

STEP 1

Decide What to Measure

Most programs try to measure too much and end up with data no one reads. Start by answering three questions before collecting a single number.

1 Ask: What decisions does this data need to support?

Before choosing metrics, identify who will use the data and why. A program coordinator needs different information than a band council or a funder.

COORDINATOR NEEDS

- Who is being served and how
- Where clients are getting stuck
- What supports are working
- Caseload and capacity signals

LEADERSHIP & FUNDER NEEDS

- Program reach and completion rates
- Employment outcomes
- Cost per client
- Value delivered to the community

2 Choose outputs AND outcomes — not just one

Many programs track only outputs — what you did. Funders and communities also need outcomes — what changed because you did it.

Type	Examples
Outputs (what you did)	Clients enrolled, sessions delivered, resumes written
Short-term outcomes	Clients job-ready, training completed, new credentials earned
Medium-term outcomes	Clients placed in employment, retained at 3 months, off assistance
Long-term outcomes	Income change, community employment rate, reduced reliance on OW

TIP

Pick 2–3 metrics per category. If you cannot collect it consistently, do not include it.

3 Define your metrics before you start collecting

Vague metrics create disagreements later. Define exactly what you are counting and document it before your first intake.

Metric	Working Definition	Questions to Resolve First
"Employment placement"	Client starts paid work of any kind	Does volunteer work count? What about band-funded positions?
"Program completion"	Client attends 80% or more of scheduled sessions	What if sessions were cancelled by staff? What about medical absences?
"Active client"	Client had contact with a coordinator in the past 30 days	Does a phone call count? Or must there be a signed activity on file?

WATCH OUT

Undefined metrics will be interpreted differently by every staff member. Write your definitions down before collection begins.

STEP 2

Set Up Your Data Collection System

The best system is the one your team will actually use. Start simple — you can always add complexity later.

1 Choose your collection method

Method	Strengths	Watch For
Paper forms + binder	No technology required, reliable in low-connectivity areas, easy to audit	Must be compiled manually; harder to identify trends over time
Excel or Google Sheets	Easy formulas, shareable, suited to small teams	Version control issues with multiple editors
Simple database (Airtable, Notion)	Organized, searchable, works well for multiple coordinators	Learning curve; some tools require reliable internet access
Custom-built system	Tailored to your program; can enforce OCAP® protocols from the start	Requires technical build — IPC can help

TIP

For remote and fly-in communities, always design for offline-first. A paper form entered into a spreadsheet weekly still outperforms a cloud system that does not load.

2 Build your intake form

Your intake form is the foundation of your data system. Collect only what you need — every unnecessary field is a barrier to completion.

CLIENT INFORMATION

- Unique client ID (never the SIN)
- Date of intake
- Community or reserve
- Age range (not full birthdate)
- Current situation (on OW, employed, etc.)
- Primary barrier(s) — use a standardized checklist

PROGRAM INFORMATION

- Program or stream enrolled in
- Coordinator assigned
- Employment Action Plan date
- Target completion date
- Referral source
- Consent signature and date

WATCH OUT

Never use a client's SIN, full birthdate, or health card number as an identifier. Assign an internal client ID. This protects privacy and aligns with OCAP® principles.

3 Set a collection rhythm

Frequency	What to Collect
At every client contact	Activity log, attendance, notes on progress and barriers
Monthly	Active caseload count, new placements, withdrawals, referrals out
Quarterly	Outcomes summary, financial burn rate vs. budget, retention check-ins
Annually	Full program review, funder report, community-facing presentation

TIP

Block 30 minutes every Friday for data entry. Catching up on months of intake forms is the leading reason reporting systems fail.

STEP 3

Build Your Reporting Framework

A reporting framework turns raw data into something leadership and funders can understand and act on. It does not have to be complex.

1 Create your standard report template

Every report — regardless of audience — should follow the same structure. Consistency builds credibility over time.

Section	What It Includes
1. Cover summary	3–5 key numbers at a glance: enrolment, completions, placements, budget used
2. Program narrative	What happened this period — in plain language, not bureaucratic terms
3. Outcomes table	Targets vs. actuals for each metric you committed to tracking
4. Barriers & context	What made this period harder or easier — honest context, not excuses
5. Client stories	1–2 anonymized stories that put a human face on the numbers
6. Next period plan	What you are focusing on next and why

TIP

Write the narrative before you fill in the numbers. Numbers without story are easy to dismiss. Story without numbers is easy to ignore. You need both.

2 Build separate views for different audiences

FOR YOUR FUNDER

Lead with outcomes, not activity.

- Employment placement rate
- Cost per client served
- Percentage of annual targets met
- Client retention at 3 months

NOTE

Keep the funder report to two pages maximum. Funders read

FOR YOUR BAND COUNCIL

Lead with community impact.

- Number of community members served
- Jobs created or retained locally
- Estimated local economic benefit
- Gaps and unmet need

TIP

A simple visual showing who you are reaching lands better with council

3 Use a dashboard for internal monitoring

A dashboard does not have to be digital. A one-page summary updated monthly and posted in your office does exactly the same job.

Question the Dashboard Answers	Metric to Track
How many clients are active right now?	Current caseload count
Are we on track to hit our annual targets?	Percentage of annual targets met to date
Where are clients getting stuck?	Top 3 barriers reported this month
How are we spending our budget?	Budget used vs. remaining
What is our biggest win this month?	One outcome worth recognizing as a team

STEP 4

Analyze and Interpret Your Data

Numbers do not speak for themselves. Your job as a program lead is to understand what the data means — and equally, what it does not mean.

1 Calculate your core KPIs

KPI	Formula	Example
Completion Rate	Clients completed ÷ total enrolled × 100	72%
Employment Rate	Clients placed ÷ clients completed × 100	58%
Cost per Client	Total budget ÷ total clients enrolled	\$1,888
Retention Rate (3 mo.)	Still employed at 3 months ÷ total placed × 100	81%
Barrier Rate	Clients with 2+ barriers ÷ total enrolled × 100	63%
Referral Conversion	Clients from referral ÷ total enrolled × 100	44%

NOTE

If you cannot calculate a KPI, that is a signal — not a failure. It means a collection step is missing. Identify it and add it to your intake form.

2 Ask "why" before drawing conclusions

A low employment rate does not automatically mean a failing program. Context matters enormously — especially in remote and fly-in communities.

If You See...	Do Not Assume...	Consider Instead...
Low employment rate	Poor program quality	No local jobs; clients training for future opportunities
High withdrawal rate	Clients are not engaged	Housing instability; trauma; seasonal land-based obligations
Low cost per client	The program is efficient	May be underfunded; coordinators covering gaps unpaid
High barrier rate	The program is struggling	Your program is reaching those who need it most — that is a strength

OCAP® PRINCIPLE

Your community has context that provincial data systems will never capture. A 40% employment rate in a fly-in community with no local employer tells a completely different story than the same number in a city. Always pair numbers with narrative.

3 Compare to yourself — not to other communities

Provincial benchmarks are built on urban delivery models. Comparing a remote community's outcomes to a Toronto employment centre is neither useful nor fair.

BETTER COMPARISONS

- Your program this quarter vs. the same quarter last year
- Your completion rate in the first cohort vs. the most recent
- Your cost per client this year vs. three years ago
- Employment rate for clients with one barrier vs. clients with three or more

TIP

Trend data is far more powerful than a snapshot. A program improving its employment rate from 30% to 48% over two years tells a compelling story even if 48% sounds low in isolation.

STEP 5

Present Your Findings

A great report that nobody reads is a wasted effort. Presentation is not a finishing touch — it is part of the work.

1 Know your audience before you write a word

Audience	Format	Tone
Funder or ministry	2-page summary with outcomes table	Formal, evidence-focused, professional
Band council	5-minute verbal + one visual page	Plain language, community-centred, story-led
Your program team	Monthly dashboard review and discussion	Honest, practical, focused on action
Community members	Newsletter or open meeting	No acronyms, plain language, celebrate wins

2 Lead with the story, not the spreadsheet

The most effective reports open with a human moment, then support it with data — not the other way around.

EXAMPLE OPENING — FUNDER REPORT

"This year, 47 community members completed our employment program. Among them was a single mother of three who, after 14 years away from the workforce, secured a full-time position with the band's health authority. Her story is one of 28 employment placements we achieved this year — a 61% placement rate against a target of 50%."

TIP

Always obtain client consent before including their story — even anonymized. A verbal confirmation and a note in the file is sufficient.

3 Use simple visuals — even hand-drawn ones

You do not need expensive software. A bar chart in Excel or a progress bar on a whiteboard is more memorable than three paragraphs of numbers.

MOST EFFECTIVE FOR PROGRAM DATA

- Bar chart — this year vs. last year
- Simple pie — clients by barrier type
- Progress bar — targets vs. actuals
- Timeline — intake to placement

WHAT TO AVOID

- 3D charts — they distort the data
- More than 3 colours in one chart
- Font smaller than 10pt
- Charts with no title or axis labels

STEP 6

Build a Culture of Improvement

A metrics system that only activates at reporting time is not a system — it is a fire drill. Make data a normal, low-friction part of how your program operates every month.

1 Hold a monthly data conversation

Reserve 20–30 minutes at your team meeting each month to review numbers together. The purpose is not to assign blame — it is to stay curious and adjust early.

THREE QUESTIONS TO ASK EVERY MONTH

- What is the one number that concerns us most right now — and why?
- What is the one number we are most proud of — and how do we protect it?
- What is one thing we could do differently next month based on what the data shows?

2 Build an annual program review cycle

Month	Activity
April	Start of fiscal year — set targets, confirm metric definitions, update forms
July	Q1 check-in — are targets realistic? Adjust if conditions have changed
October	Mid-year review — outcomes, barriers, and budget tracking
January	Q3 check-in — final push before year-end; flag reporting risks early
March	Year-end — compile annual report, document lessons, begin next cycle

3 Document your lessons — not just your results

The most valuable thing you can pass on to the next coordinator is not your data — it is what the data taught you.

After each reporting period, write one paragraph answering:

- What worked better than expected, and why?
- What did not work, and what do you believe caused it?
- What would you do differently with the same budget and resources?
- What do you wish you had been measuring all along?

TIP

Keep these lessons in a shared folder — even a simple document or binder. When staff turnover happens, this institutional knowledge is hardest to replace.

Reference Tables

Core KPI Quick Reference

KPI	Formula	What It Tells You
Enrolment Rate	$\# \text{ enrolled} \div \# \text{ referred} \times 100$	Are referrals converting to active clients?
Completion Rate	$\# \text{ completed} \div \# \text{ enrolled} \times 100$	Are clients finishing what they start?
Employment Rate	$\# \text{ placed} \div \# \text{ completed} \times 100$	Are completers finding work?
Retention Rate (3 mo.)	$\# \text{ still employed at 3 months} \div \# \text{ placed} \times 100$	Is the employment lasting?
Cost per Client	$\text{Total budget} \div \# \text{ enrolled}$	What does it cost to serve one person?
Barrier Rate	$\# \text{ with 2+ barriers} \div \# \text{ enrolled} \times 100$	How complex is your caseload?
Caseload Ratio	$\# \text{ active clients} \div \# \text{ coordinators}$	Is your team capacity sustainable?
Referral Rate	$\# \text{ referred out} \div \# \text{ enrolled} \times 100$	What percentage need services beyond your program?

Standardized Barrier Checklist

Using consistent barrier categories makes your data comparable across reporting periods. Track these as checkboxes on your intake form.

- No photo ID or documentation
- No SIN or banking access
- Transportation barrier
- Childcare or dependent care
- Housing instability
- Physical health condition
- Mental health condition
- Trauma or grief
- Substance use
- Justice system involvement
- Limited literacy or numeracy
- Limited English or language barrier
- No formal work experience
- No internet or technology access
- Fear of losing OW benefits
- Remote location with no local employment

Reporting Period Calendar

Funding Stream	Fiscal Year	Reporting Frequency
Ontario Works (provincial)	April 1 – March 31	Monthly + Annual
Canada–Ontario Labour Market Agreement	April 1 – March 31	Quarterly + Annual
ISETS / Indigenous Skills & Employment	April 1 – March 31	Quarterly + Annual
Band-operated programs	Varies by resolution	As determined by council

Funding Stream	Fiscal Year	Reporting Frequency
Better Jobs Ontario	Per agreement	Per client completion

DATA SOVEREIGNTY

OCAP® Principles in Practice

OCAP® — *Ownership, Control, Access, and Possession* — is the standard framework for how First Nations govern their own data. Developed by the First Nations Information Governance Centre, it applies directly to employment and program data.

O —

Ownership

A community or group owns information about itself collectively, in the same way that an individual owns their personal information.

In practice: Do not sign data sharing agreements that transfer ownership of community data to a funder or provincial ministry. Data about your clients belongs to your community.

C — Control

First Nations have the right to control all aspects of research and information management processes that affect them.

In practice: You decide what gets measured, how it is reported, and who sees it. If a funder demands formats that do not align with your needs, you have the right to negotiate.

A — Access

First Nations must have access to information and data about themselves and their peoples wherever that data exists.

In practice: Ensure your community can access its own program data — not just the funder. Build data returns into every reporting agreement you sign.

P —

Possession

Possession is the mechanism through which ownership is asserted and protected.

In practice: Store data locally where possible. Know where it lives, who can access it, and what happens to it when a funding agreement ends.

NOTE

For more on OCAP® principles and First Nations data governance, visit the First Nations Information Governance Centre at fnigc.ca

When to Get Help from IPC

This guide gives you a strong foundation. But every community's situation is different — your funding streams, capacity, data sovereignty protocols, and reporting relationships are unique to you.

Consider reaching out to IPC when:

- You need a reporting system built specifically for your funding requirements
- Your funder is asking for metrics or formats you do not know how to produce
- You are onboarding a new coordinator and need to document your current system
- You want a data sovereignty framework that protects your community's information
- You are combining multiple funding streams and need one coherent reporting structure
- You want to train your staff on data collection and program metrics

Ready to build something specific to your community?

Insight Pathways Consulting builds custom metrics systems, reporting frameworks, and data tools for First Nations programs across Ontario. We are here to understand and guide — not to tell you what to do or how to do it. Your community knows its priorities. We help you build the systems to measure and communicate them clearly.

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