

Annual Report 2020: *Growing with purpose*



CONTENTS

Message from the President	1
Board of Directors	2
Our Story	3-4
Mission, Vision Values	4
Executive Director Report	5
Financial Statements	6



From left to right: Martha McGuire, Gillian Kerr, Neil Price, Sara Gaudon (2015)

Message from departing President Martha McGuire

In gratitude to co-founder Gillian Kerr for her leadership.

LogicalOutcomes was founded in 2013, by Gillian Kerr and Neil Price. Without them we would not be here.

As I step down as president, I reflect back to LogicalOutcomes' early years, working with Gillian, who was always excited about something new. Her first idea was to create a non-profit evaluation firm – this was accomplished. Next, it was applying open-source District Health Information System (DHIS2), used in over 60 countries to manage public health information, as monitoring and evaluation software. Gillian earned respect within the DHIS2 community, then passed the torch onto Sara Gaudon who continues to lead our DHIS2 service. Next, Gillian immersed herself into indicator registries exploring many different platforms, never finding quite the right one. So, she began developing Service Information System (SIS), a platform that helps non-profits do better evaluation. Gillian has now passed on the primary responsibilities of managing SIS to Sophie Llewellyn.

Gillian laid the groundwork for all that has happened in the past fiscal year:

- In-person Board planning day applies 'business model canvas' to strategize three service areas: SIS, DHIS2, and Evaluation.
- Sara presents 'DHIS2 for Monitoring and Evaluation' at the American Evaluation Association conference in Minneapolis, Minnesota.
 - AGM 2019 brings renewed commitment from all Board members.
 - Gillian and I met local non-profit leaders to talk evaluation at the annual Ontario Nonprofit Network conference in Toronto, Ontario.
 - Revised governance policy document approved by the Board.
 - New Directors Neil Price and Salima Shariff join the Board. Neil is the incoming president, serving a term from 2020 – 2022.

Highlight of the year 2020

LogicalOutcomes submitted a proposal to the Ontario Trillium Foundation offering our SIS evaluation platform to support outcomes measurement across their Grow Investment Stream. OTF selected LogicalOutcomes.

LogicalOutcomes has become a well-established evaluation organization offering traditional evaluation services, DHIS2 software implementation, and a custom evaluation platform that will continue to serve the interests of non-profits and charities in Canada and beyond. Looking ahead, we expect to see continued expansion of these services.

I look forward to working with Neil Price as he takes LogicalOutcomes to its logical next steps.

A handwritten signature in cursive script that reads 'm. mcguire'.

Martha McGuire, M.S.W., CE
President 2018-2020

Meet our Board of Directors 2020-21



PRESIDENT

Neil Price is an educator, writer, and editor, with expertise in community capacity-building, applied research, and stakeholder consultation.



TREASURER

Liz Rankin is a retired chartered accountant/chartered public accountant, with over 10 years experience as a director on non-profit boards.



VICE PRESIDENT

Dorothy Nyambi is a social entrepreneur and international development practitioner with over 20 years experience managing projects in the health, education, livelihoods, agribusiness, and infrastructure sectors for government donors and foundations.



DIRECTOR

Alex Goel is an independent healthcare Health Information Systems (HIT) consultant. He has worked with a variety of health data standards to improve how data is collected, stored, and used.



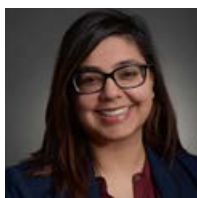
DIRECTOR

David Gotlib, M.D. FRCP (C) is a general and child psychiatrist, and software developer. He has a passion for delivering mental health services to those in need, and developed KoNote, an open source client note-taking software.



DIRECTOR

Martha McGuire, M.S.W., CE leads multi-disciplinary and complex evaluation projects, while mentoring emerging evaluators, bringing over 30 years experience.



DIRECTOR

Salima Shariff, MSc, BSc(H) is a mixed-methods researcher who has led national research projects with a focus on designing innovative tools and approaches that can be used to evaluate complex interventions. She currently works in digital design strategy.



DIRECTOR

Steven Uggowitzer brings over 15 years international experience in designing and deploying public health information systems. Steven is focused on data systems that scale using DHIS2 and other platforms.

**MANY THANKS
TO PAST DIRECTORS**

Gillian Kerr
Karen Monsen
Michael Potvin

Serge Eric Yakeu Djiam
Sudip Minhas
Wanying Zhao

LogicalOutcomes' impact has been intentional and noticeable. Each year, our services, team, revenue, and number of completed projects continues to grow. We're proud to share some milestones and memories that form our story.

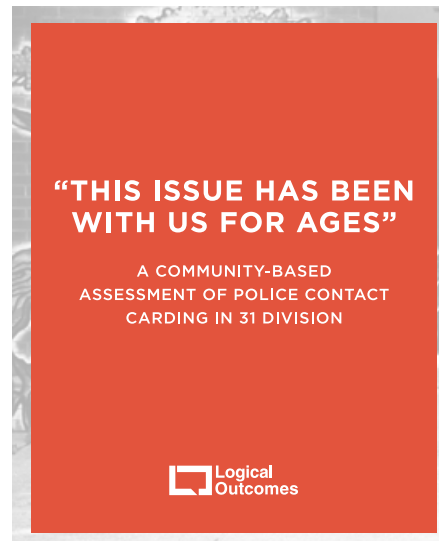


NOVEMBER 14, 2013

- LogicalOutcomes is founded as a federally incorporated non-profit with headquarters in Toronto, Canada. Gillian Kerr is the first President, and Neil Price is Executive Director.

2014

- First projects completed for Canadian organizations including Ontario Trillium Foundation, Optimus SBR, Huntingdon Society of Canada, and Ontario Council for Agencies Serving Immigrants (OCASI). Most notably, Toronto Police Services Board funded "[A Community-based assessment of Police contact carding in 31 Division](#)" which garnered significant media attention regarding the discredited police practice of carding and its impact on Black and racialized communities. ▶



2015

- Gillian attends the first [District Health Information System \(DHIS2\) Experts Conference](#) at the University of Oslo in Norway. This initiates a new service for LogicalOutcomes: setting up the open-source software as a monitoring and evaluation platform for non-profits. ▶
- Martha McGuire, internationally recognized and Credentialed Evaluator, joins the Board.



2016

- Sara Gaudon is Executive Director. Evaluation projects grow under Martha's leadership. Recognized DHIS2 technical expert Steven Uggowitz of eSHIFT partner network, joins the Board.
- Interest in DHIS2 services grow, and we secure quality clients including Helen Keller International, Alight, Nascent Solutions and CARE USA.
- Our network of DHIS2 experts expands to Health Information Systems Program ([HISP Uganda](#)), who provide virtual support and custom application development.
- Revenue for the year just shy of a quarter million (CAD); DHIS2 services contribute to half of revenue.

2017

- Martha becomes President of LogicalOutcomes.
- Led by Gillian Kerr, LogicalOutcomes initiates significant research and development to pilot an evaluation platform for non-profits called '[Service Information System](#)' (SIS).



This work is made possible through OCASI and the Ontario Ministry of Citizenship and Immigration.

Our Story

2017 (CONTINUED)

- Mission and vision is articulated at the first in-person strategic planning session at Centre for Social Innovation in Toronto (our board room, on occasion).
- Revenue nears \$400,000 CAD, DHIS2 services contribute 50%.

2018

- The Board continues to recruit new members, establishing a governance of seven Directors.
- Dr. David Gotlib donates KoNote to LogicalOutcomes who assumes leadership of the source code on GitHub.



- Martha secures two projects with UNESCO and continues to mentor new and emerging evaluators through her work.
- ▼ Sara joins the DHIS2 experts conference at the University of Oslo to present our approach to using the software for M&E, and meets Eric and Prosper of HISP Uganda.
- Revenue of \$450,000 CAD; growing SIS service contributes a third of revenue.



From left to right: Eric Munyambabazi, Sara Gaudon, Prosper Behumbiize

2019

- Strategic session at CSI refines our mission vision and values.

VISION

LogicalOutcomes contributes to social justice and equity by empowering stakeholders with data, technology, and information to be more effective.

MISSION

We build organizational evaluation and learning capacity.

WE VALUE

- Collaboration
- Respect
- Sharing towards the public good
- Creativity and learning
- Integrity and ethical behaviour
- Competency and self-reflection



- The SIS platform is open for business and supports Toronto-area non-profits to evaluate better.
- LogicalOutcomes hires a Data Protection Officer, and completes General Data Protection Regulation (GDPR) compliance exercise.
- Revenue dips to \$343K CAD; services in Evaluation, DHIS2 and SIS each contribute a third of revenue.

2020

- Gillian departs the Board, Martha steps down as President, and Neil Price returns to lead the Board. Two new members join, establishing a governance of eight directors.
- SIS services contributes majority of \$422K revenue (40%) with DHIS2 and Evaluations contributing 30%. Excess revenue of \$65K CAD generated thanks to fiduciary diligence, and immense pro-bono and volunteers support from those mentioned in this report.
- LogicalOutcomes hires first employees: SIS Senior Manager (full time) and part-time Office Manager.

LogicalOutcomes is a recognized international evaluation and DHIS2 firm, supporting universities and international development donors to create monitoring and evaluation systems, design metadata registries, and evaluate their policies and programs.

Message from Executive Director

Dear colleagues,

Compiling our story on the preceding pages, I am humbled by our collective achievements.

Although small in size, LogicalOutcomes continues to be big on impact. There's something unique about the way we work: with rigor, agility, in collaboration, and with a selflessness that extends beyond the work.

In just seven years, LogicalOutcomes grew from a vision into a functioning not for profit consulting company with services in demand. We retain talent, and we're consistently at capacity. We rely on dedicated, high performing consultants for this business to survive and thrive.

In addition to those recognized in this report, I'd like recognize two members of the LogicalOutcomes family for their unmatched contributions:

- **Sophie Llewelyn**, MSc, began managing evaluation projects in 2018 and is now Senior Manager for our SIS platform. Accepting the significant challenge in developing something new, Sophie is on the pathway to becoming a Credentialed Evaluator.
- **Georgi Chakarov**, Certified Internal Auditor, was first introduced to LogicalOutcomes in 2015 and continues as our lead DHIS2 analyst. He digs into client metadata, turning complex paper and Excel tools into robust online systems.

2020 has been a year of firsts.

We welcome a permanent office manager, three Board Members, and over half a dozen new consultants from around the world. My performance was reviewed by our Board and consultants, and Martha initiated our first Board Evaluation process, using the Community Literacy of Ontario's Board Governance Resources Guide checklist. We implemented a new Code of Conduct and completed our policy manual.

This document is another milestone: our first Annual Report.

Looking ahead, there is an abundance of opportunity for LogicalOutcomes and the communities we serve. Times are changing quickly, and we are well adapted to remotely-support our clients through this challenging time.

Thank you for reading, and staying with us.

Sara Gaudon



Executive Director



Sophie, based in Toronto pictured with daughters Esme and Agnes



Georgi is based in Sofia, pictured with son Phillip

Financial Report 2019-20

BALANCE SHEET

As of June 30, 2020

	JUNE 30, 2020	JUNE 30, 2019
ASSETS		
Cash and Cash Equivalent - CAD	\$21,268.18	\$4,245.42
Cash and Cash Equivalent - USD	\$36,646.67	\$17,696.79
Total Cash and Cash Equivalent	\$57,914.85	\$21,942.21
Accounts Receivable (A/R) - CAD	\$3,751.60	\$5,650.00
Accounts Receivable (A/R) - USD	\$21,828.35	\$6,559.51
Total Accounts Receivable (A/R)	\$25,579.95	\$12,209.51
HST Receivable	\$0.00	\$15,044.59
Prepaid expenses	\$0.00	\$481.70
Uncategorized Asset	-\$2,016.07	\$0.00
Unrealized Loss/gain on FX	-\$665.49	-\$665.49
Total Assets	\$80,813.24	\$49,012.52
LIABILITIES AND EQUITY		
Accounts Payable (A/P)	\$3,807.91	\$22,887.98
Credit Card	\$1,162.44	\$0.50
GST/HST Payable	-\$2,583.27	\$6,711.71
Accrued Liabilities		-\$688.47
Total Current Liabilities	\$2,387.08	\$28,910.72
Deferred Revenue	\$100.00	\$1,850.00
Loan	\$4,793.23	\$10,778.16
Total Non-current Liabilities	\$4,893.23	\$12,628.16
Total Liabilities	\$7,280.31	\$41,538.88
Equity		
Opening Balance Equity	-\$50,241.48	-\$50,241.48
Retained Earnings	\$57,715.12	\$93,493.12
Excess Revenue for the year	\$66,059.29	-\$35,778.00
Total Equity	\$73,532.93	\$7,473.64
TOTAL LIABILITIES AND EQUITY	\$80,813.24	\$49,012.52

REVENUE AND EXPENDITURES

July 1, 2019 - June 30, 2020

	JULY 1 2019 - JUNE 30, 2020	JULY 1, 2018 - JUNE 30, 2019
REVENUE		
Grants	\$0.00	\$26,840.89
Sales	\$424,902.93	\$317,040.17
Total Revenue	\$424,902.93	\$343,881.06
EXPENSES		
Executive Director Fees	\$14,655.00	\$14,000.00
Marketing & Development	\$2,033.22	\$2,695.78
Insurance	\$1,341.88	\$1,437.45
Consultant Fees & Project Expenses	\$332,211.95	\$311,542.36
Operational Expenses	\$9,575.64	\$45,149.47
Total Expenses	\$359,817.69	\$374,825.06
OTHER EXPENSES		
Exchange Gain or Loss	-\$1,021.86	\$4,847.90
Total Other Expenses	-\$1,021.86	\$4,847.34
EXCESS REVENUE	\$66,107.10	-\$35,778.00

With revenues under \$1 million, LogicalOutcomes is not required to undergo a financial audit (Canada Not-for-profit Corporations Act). Welch LLP, CPAs, performed a 'Review Engagement' on the June 30, 2018 financial statements.

Contact finance@logicaloutcomes.net for more information.

Accountant for 2019-20: Christine Bourne, CPA, CMA