

# **Employment Ontario Information System (EOIS) Case Management System**

## **Service Provider User Guide: Reporting**



## **Literacy & Basic Skills Detailed Service Quality Report #64**

Version 2.1

December 2017

# Table of Contents

- Literacy & Basic Skills Detailed Service Quality Report #64..... 1
  - Document History ..... 3
  - Description ..... 4
  - Access ..... 4
  - Format, Schedule and Retention ..... 4
  - Data Filtering..... 5
  - Service Quality Core Measures ..... 6
  - Service Quality – Phase II - A and II - B..... 23
  - Allocations and Expenditures ..... 26

## Document History

Version #	Date	Description
1.0	June 2012	Initial Guide
1.1	April 2013	Updated Guide for Learners Served calculation – is only unique Learners effective October 2012. Updates made for consistency in terminology..
1.2	September 2013	Updated filter criteria: Competency sub-goal must be “In Progress” or “Completed” and not have a “Cancelled” outcome.
1.3	May 2014	Changes to reflect Phase II - A including updated provincial standards within the Service Quality Standard.
1.4	July 2014	Updates to reflect new Release 4.0 user interface
1.5	December 2015	Update to format and readability
1.6	February 2016	Updates to reflect Release 5.4
1.7	June 2016	Updates to reflect Release 6.1
1.8	August 2016	Minor changes throughout
1.9	April 2017	Update to reflect change in the reporting schedule
2.0	September 2017	Updates to reflect Release 17.3 <ul style="list-style-type: none"> <li>• Format, Schedule and Retention</li> </ul>
2.1	December 2017	Update to reflect 17.4 <ul style="list-style-type: none"> <li>• Change reference to Aboriginal to Indigenous</li> </ul>

### Description

The Literacy and Basic Skills (LBS) Detailed Service Quality – Report 64 compares a service delivery site’s performance commitments noted in the Schedule E targets of the agreement with the ministry, to actual results which are taken from summarized Employment Ontario Information System, Case Management System (EOIS-CaMS) data.

This report guide is available directly from the reporting website and it is recommended that it be used with the printed report as a reference document. For more general information on reports refer to Chapter 10: Case Management System Reports of the EOIS CaMS Service Provider User Guide available on the [EOPG](#).

### Access

Users with service provider manager and caseworker reporting roles and Ministry users have access to this report.

### Format, Schedule and Retention

This report is designed to be opened and viewed in PDF, and will print well if directly printed from the EOIS SP Reporting website.

This report is available monthly on the first Monday of the month. LBS service plans must be closed by month end to be included in the report. Any changes made to data after month end will be reflected in the following month’s report.

A total of 121 months of reports are retained on the EOIS SP Reporting Website.

## Data Filtering

This report includes data from LBS service plans that were closed within a defined start and end date. The defined start and end date time frame is referred to throughout this guide as the report period.

Note: The “Report Period” is listed in the report’s header information.

Service plans must contain one or more of the following sub-goals from the “Competencies” sub-goal type and have a status of either “In Progress” or “Completed” without having an outcome of “Cancelled”:

- Find and Use Information
- Communicate Ideas and Information
- Understand and Use Numbers
- Use Digital Technology
- Manage Learning
- Engage With Others

Note: If the only sub-goal selected from the “Competencies” sub-goal type is “Learning Activities”, then the service plan will not be included in the report.

The service plan must contain one or more of the competencies listed above.

The Progress and Learners Served measures also include data from active service plans.

Service plans that have a closure reason of “Opened in Error” are excluded from the report.

Performance report data is cumulative starting from the beginning of the fiscal year to the end of the report period. Any changes made to data after the report is generated will be reflected in the following month’s report up to year end.

## Detailed Report Breakdown

The LBS Detailed Service Quality - report 64 is broken into three sections:

1. Service Quality Core Measures  
Target and actual core measures of performance by service delivery site
2. Service Quality – Phase II - A and II - B  
Target and actual service quality measurements for Phase II - A and II - B.
3. Allocations and Expenditures  
Actual allocations and expenditures.

## Service Quality Core Measures

### Column Descriptions

#### 1. LBS Core Measure Number (LBS CM#)

Reference numbers are assigned to each core measure. These numbers may be referred to in other reports to indicate which performance measures apply.

#### 2. Service Quality Core Measures

Lists the dimensions, core measures and indicators of service quality success. (for more information on LBS Program performance management indicators refer to the LBS Service Provider Guidelines available on the [Employment Ontario Partners' Gateway website](#).)

#### 3. LBS Provincial Target (LBS Prov. Target)

Displays the minimum provincial standard identified for each performance measure by the ministry.

#### 4. Performance Commitment Annual Target (Perf Com Ann. Target)

Displays the service delivery site target identified on Schedule E (Service Quality Site Commitments column) of the agreement between the service provider and the ministry.

#### 5. Year to Date All Participants (YTD All Participants)

Displays the cumulative total starting from the beginning of the fiscal year (April 1) to the end of the report period.

#### 6. Num (Numerator)

Column displays the count of participants who meet the criteria being measured.

#### 7. Den (Denominator)

Displays the count of participants who could have met the criteria being measured.

#### 8. Actual

In most cases represents the Numerator divided by the Denominator. Exceptions will be indicated in the Calculation sections of this Guide.

#### 9. Percentage Year to Date of Target (% YTD of Target)

In most cases represents how the service delivery site is achieving against their target (from the Performance Commitment Annual Target column). Exceptions will be noted in the Calculation sections of this Guide.

## Customer Service

The Customer Service dimension includes two core performance measures:

Customer Satisfaction which indicates how satisfied learners are with the LBS Program delivered by the service provider, and Service Coordination which tracks supported referrals into and out of the LBS program.

### Customer Satisfaction

1. Definition: Customer Satisfaction is a measure of feedback from learners about their satisfaction with the LBS Program.

At exit from service, service providers will ask the following question to learners participating in the LBS Program.

“On a 1-5 scale, how likely are you to recommend the LBS Program to someone looking for similar services as those you received?”

- 1 – strongly not recommend
- 2 – rather not recommend
- 3 – no general opinion
- 4 – generally recommend
- 5 – strongly recommend
- 6 – no response

Learners who respond to the question with a rating of 4 or 5 are considered satisfied.

2. Data Source: Customer Satisfaction is pulled from the Close Service Plan page, “Customer Satisfaction” field. The service plan must be closed and have at least one competency.
3. Calculation:
  - Numerator – is the number of service plans with satisfaction rated at the 4 or 5 level.
  - Denominator – is the sum of service plans with satisfaction rated from 1 to 5.
  - Actual – is the percentage of closed service plans with satisfaction rated at the 4 or 5 level divided by the total number of service plans rated 1 to 5. (Numerator / Denominator).
  - % YTD of Target – represents how the service delivery site is achieving against their performance commitment annual target (Actual / Target)

Note: 100% or better indicates that the service delivery site is meeting or exceeding its performance commitment.

The report further groups Customer Satisfaction by the following categories for information purposes:

1. **Learner:** Represents the year-to-date number of LBS service plans with satisfaction with service rated at the 4 or 5 level divided by the total of ratings 1 to 5.
2. **Data Source:** Learner uses the same data source as Customer Satisfaction.
3. **Calculation:** Learner uses the same calculations as Customer Satisfaction for Numerator, Denominator and Actual.
4. **Learner Response Rate:** Represents the actual number of learners who responded to the customer satisfaction question.
5. **Data Source:** Learner Response Rate uses the same data source as Customer Satisfaction.
6. **Calculation:**
  - **Numerator** – is the number of closed service plans with satisfaction with service rated at the 1 to 5 level
  - **Denominator** - is the number of closed service plans with satisfaction with service rated at the 1 to 6 level (6 being no response)
  - **Actual** – is the percentage of closed service plans with responses to the customer satisfaction question (Numerator / Denominator)

### **Service Coordination**

1. **Definition:** Service Coordination tracks how well a service provider works within the LBS and Employment Ontario (EO) delivery system and in the community. It measures the percentage of learners in the LBS Program who experience effective, supported referrals into, during or at exit from the LBS Program.
2. **Data Source:** Service Coordination is pulled from the same data source used for the Numerator column of the 5 referrals identified below.



### 3. Calculation:

- Numerator – is the number of service plans with at least one of the referrals identified below.

Note: Only one referral is counted per service plan, regardless of whether or not there are multiple referrals in the service plan.

- Denominator – is the sum of service plans that were closed within the report period.
- Actual – is the percentage of service plans with a supported referral. (Numerator / Denominator)

The report further groups Service Coordination by the following categories for information purposes:

#### Referred In

1. Definition: The learner has been formally referred, through a recognized referral process, not word of mouth, to the LBS Program service provider from another EO service provider or other community organizations and services.
2. Data Source: Referred In is pulled from the “Service Plan Home” page, Case Details panel, “Referred In” field. The service plan must be closed and have at least one competency.
3. Calculation:
  - Numerator – is the number of service plans with any of the following Referred In selections:
    - EO – Action Center
    - EO – Apprenticeship Program – Co-op Diploma Apprenticeship Program
    - EO – Apprenticeship Program – Ontario Youth Apprenticeship Program
    - EO – Apprenticeship Program – Other
    - EO – Apprenticeship Program – Pre-Apprenticeship Program
    - EO – Service Provider – Other
    - EO – Youth Job Connection Service Provider
    - EO – Youth Job Link Service Provider
    - EO – Youth Job Connection - Summer Service Provider
    - EO – Targeted Initiative for Older Workers Service Provider
    - EO – Employment Service Provider
    - EO – Ontario Job Bank
    - Government Services Municipal

- Government Training Federal – Language Assessment/Training
- Government Training Federal – Other
- Government Training Federal – Youth Employment Strategy
- Government Training Provincial – Language Assessment/Training
- Government Training Provincial – Other
- Independent Learning Centre
- Language Assessment/Training – Other
- Ministry of Citizenship and Immigration - Bridge Training for Immigrants
- Ministry of Citizenship and Immigration – Other
- Ontario Disability Support Program
- Ontario Internship Program
- Ontario Women’s Directorate
- Ontario Works
- Other – structured/formal referral
- Probation and Parole
- Service Canada
- Services for Aboriginal People
- Summer Jobs Service
- WSIB

Note: Learners referred in via the following programs are not included in this category:

- EO - Literacy and Basic Skills Service Provider
  - Informal Word of Mouth/Media Referral
  - No Response
- 
- Denominator – is the sum of service plans that were closed within the report period. (Displayed in Service Coordination)
  - Actual – the percentage of service plans with a supported referral into the LBS program. (Numerator / Denominator)

### Referred Out - Registered in Education

1. Definition: The learner has confirmed that they are registered, as a result of the LBS Program service provider, in an education program that will provide them with a recognized high school or high school equivalent certification.
2. Data Source: Referred Out – Registered in Education is pulled from the “Status” field of plan items under the sub-goal “Referral to Other Programs and Services”. The service plan must be closed and have at least one competency.

### 3. Calculation:

- Numerator - is the number of service plans with the following plan items with a status of "Completed":
  - General Education Development
  - High School
  - Independent Learning Center
  - Post Secondary
- Denominator – is the sum of service plans that were closed within the report period. (Displayed in Service Coordination)
- Actual – the percentage of service plans which indicate that the learner experienced a supported referral from the LBS program into an education program. (Numerator / Denominator)

### Referred Out – Registered in Training

1. Definition: The learner has confirmed that they are registered or participating in training as a result of the LBS Program service provider.
2. Data Source: Referred Out – Registered in Training is pulled from the "Status" field of plan items under the sub-goal "Referral to Other Programs and Services". The service plan must be closed and have at least one competency.
3. Calculation:
  - Numerator - is the number of service plans with the following plan items with a status of "Completed":
    - EO – Apprenticeship Program – Co-Op Diploma Apprenticeship Program
    - EO - Apprenticeship Program – Other
    - EO – Apprenticeship Program – Pre-Apprenticeship Program
    - EO – Literacy and Basic Skills Service Provider
    - Government Training Federal – Other
    - Government Training Provincial – Other
    - Language Services – Training
    - Ministry of Citizenship and Immigration-Bridge Training for Immigrants
  - Denominator – is the sum of service plans that were closed within the report period. (Displayed in Service Coordination)
  - Actual – the percentage of service plans which indicate that the learner experienced a supported referral from the LBS program into training. (Numerator / Denominator)

### Referred Out - Registered in Employment

1. Definition: The learner has confirmed that they are registered or confirmed receiving services with an Employment Service (ES), Youth Job Link (YJL), Youth Job Connection (YJC), Youth Job Connection – Summer (YJCS), or Targeted Initiative for Older Workers (TIOW) service provider as a result of the LBS program service provider.
2. Data Source: Referred Out – Registered in Employment is pulled from the “Status” field of plan items under the sub-goal “Referral to Other Programs and Services”. The service plan must be closed and have at least one competency.
3. Calculation:
  - Numerator - is the number of service plans with the following plan items with a status of “Completed”:
    - EO – Employment Service Provider
    - EO – Youth Job Connection Service Provider
    - EO – Youth Job Link Service Provider
    - EO – Youth Job Connection - Summer Service Provider
    - EO – Targeted Initiative for Older Workers Service Provider
  - Denominator – is the sum of service plans that were closed within the report period. (Displayed in Service Coordination)
  - Actual – the percentage of service plans which indicate that the learner experienced a supported referral from the LBS program into Employment. (Numerator / Denominator)

### Referred Out – Registered or Confirmed Receiving Services with Community Resources that Support Learning

1. Definition: The learner has confirmed that they are registered or confirmed receiving services with other community resources that support the achievement of their goals as a result of the LBS program service provider.
2. Data Source: Referred Out – Registered or Confirmed Receiving Services with Community Resources that Support Learning is pulled from the “Status” field of plan items under the sub-goal “Referral Out to Other Community Resources”. The service plan must be closed and have at least one competency.

### 3. Calculation:

- Numerator - is the number of service plans with the following plan items with a status of "Completed":
  - EO – Action Center
  - Child Care
  - Educational/Academic Services
  - Financial Planning
  - Health/Counselling Services
  - Housing Services
  - Language Services – Assessment
  - Legal Services
  - Newcomer Services
  - Regulatory Bodies
- Denominator – is the sum of service plans that were closed within the report period. (Displayed in Service Coordination)
- Actual – the percentage of service plans which indicate that the learner experienced a supported referral from the LBS program to other community resources that support learning. (Numerator / Denominator)

Note: If a plan item is not noted in the four referred out Numerator calculations above, then it does not apply to the Service Coordination core measure.

## Effectiveness

The effectiveness of the LBS Program is measured by whom the service provider serves, Suitability, and by what the LBS Program achieves for those learners through three measures: Completion of Goal Path, Learner Progress, and Learner Gains.

## Suitability

1. Definition: Suitability is a measure of who is being served. It examines and quantifies identified client barriers to learning. This measure ensures that LBS service providers are providing services to the clients who can most benefit from the LBS Program.

Service Providers must serve clients who, on average, are experiencing at least 30% of identified suitability indicators. This does not mean that every single client must have 30% of the identified indicators (some clients may have more and some may have fewer) and the combination does not matter.

The ten suitability indicators are:

1. <Grade 12
2. OW/ODSP recipient or
3. No source of income or
4. Crown Ward
5. More than 6 years out of education
6. More than 6 years without training
7. Age over 45 and under 64
8. History of Interrupted Education
9. Disabled
10. Indigenous
11. Deaf
12. Francophone

Note: Suitability indicator 2, 3 and 4 are counted as one indicator.

2. Data Source: All suitability indicators are pulled from service plans that must be closed and have at least one competency.

- <Grade 12 is pulled from the Client Summary page, Education panel, “Highest Level of Education Completed” field.
- OW/ODSP Recipient is pulled from the Client Summary page, Source of Income panel.
- No Source of Income is pulled from the Client Summary page, Source of Income panel.
- Crown Ward is pulled from the Client Summary page, Source of Income panel.
- More than 6 Years Out of Education is pulled from the Client Summary page, Education panel, “Time Out of Formal Education” field.
- More than 6 years without training is pulled from the Client Summary page, Education panel, and “Time Out of Training” field.
- Age over 45 and under 64 is pulled from two fields:
  - “Date of Birth” is pulled from the Details panel of the Person Home page.
  - Service plan “Start Date” is pulled from the Details panel of the Service Plan Home page.

- History of Interrupted Education is pulled from the Client Summary page, Education panel, “History of Interrupted Education” field.
- Disabled is pulled from the Person Home page, Client Self Identification panel, “Person with Disability” field.
- Indigenous is pulled from the Person Home page, Client Self Identification panel, “Indigenous” fields.
- Deaf is pulled from the Person Home page, Client Self Identification panel, “Deaf” and “Deafblind” fields.
- Francophone is pulled from the Person Home page, Client Self Identification panel, “Francophone” field. The following is included:

### 3. Calculation:

Numerator – is the number of the following suitability indicators:

1. <Grade 12 (one of the following):
  - Grade 0-8
  - Grade 9
  - Grade 10
  - Grade 11
2. OW/ODSP Recipient (one of the following):
  - Ontario Works
  - Ontario Disability Support Program
3. No Source of Income
  - No Source of Income
4. Crown Ward
  - Crown Ward

Note: A service plan can only have one selected from “OW/ODSP Recipient”, “No Source of Income”, and “Crown Ward”.

5. More than 6 years out of education
  - More than 6 years
6. More than 6 Years Without Training
  - More than 6 years
7. Age Over 45 and Under 64
  - Age is calculated at entrance to the LBS program. The calculation is service plan start date minus date of birth.

8. History of Interrupted Education
  - Yes
9. Disabled
  - Person with Disability
10. Indigenous (one or more of the following):
  - First Nations
  - Inuit
  - Métis
11. Deaf
  - Deaf
  - Deafblind

Note: If both “Deaf” and “Deafblind” are selected this indicator will only be counted once.

12. Francophone
  - Francophone

Denominator – is the sum of service plans that were closed within the report period.

Actual – is the average percentage of identified suitability indicators per learner. Actual comes from dividing the sum of indicators by the sum of closed service plans, and then by the total number of suitability indicators that apply. There are 10 suitability indicators. (Numerator / Denominator / 10)

% YTD of Target - represents how the service delivery site is achieving against their target. (Actual / Target)

### **Completions (completion of all three indicators)**

1. Definition: Completion of Goal Path is a measure of who successfully completes all elements of the learner plan. There are three indicators of completion:
  - Learners who successfully complete all Milestones
  - Learners who successfully complete Culminating task
  - Learners who successfully complete the Learning Activities
2. Data Sources: Are defined in the three indicators of Completions that follow.



### 3. Calculation:

- Numerator – the number of service plans with all three indicators successfully completed.
- Denominator – is the sum of service plans that were closed within the report period.
- Actual – is the percentage of service plans with all three indicators successfully completed (Numerator / Denominator)

### **Learners who successfully complete all Milestones**

1. Definition: The percentage of learners who successfully complete all goal-related milestones. A milestone task is related to the goal and aligned to the curriculum framework.
2. Data Source: Learners Who Successfully Complete All Milestones is pulled from the Plan Item Details page, Details panel, “Outcome” field, of the plan items under “Competencies” sub-goals. The service plan must be closed and have at least one competency.
3. Calculation:
  - Numerator – the number of service plans with all Competency plan items having an outcome of “Attained”.
  - Denominator – is the sum of service plans that were closed within the report period. (Displayed in Completions)
  - Actual – the year-to-date percentage of service plans that have all milestones successfully completed. (Numerator / Denominator)

### **Learners who successfully complete Culminating Task**

1. Definition: The percentage of learners who successfully complete a goal-related culminating task. A culminating task is more complex than a milestone, and it is related to the goal and aligned with the curriculum framework.
2. Data Source: Learners Who Successfully Complete Culminating Task is pulled from the Close Service Plan page, Assessment panel, “Has the goal path specific Culminating Task been successfully completed?” field. The service plan must be closed and have at least one competency.

### 3. Calculation:

- Numerator – the number of service plans with a ‘Yes’ response to the question “Has the goal path specific Culminating Task been successfully completed?”
- Denominator – is the sum of service plans that were closed within the report period. (Displayed in Completions)
- Actual – the percentage of service plans which indicate that the culminating task has been successfully completed. (Numerator / Denominator)

### **Learners who successfully complete the Learning Activities**

1. Definition: The percentage of learners who successfully complete all goal path requirements identified in the learner plan.

2. Data Source: Learners Who Successfully Complete the Learning Activities is pulled from the Close Service Plan page, Assessment panel, “Has the learner successfully completed all goal path requirements identified in the learner plan?” field. The service plan must be closed and have at least one competency.

### 3. Calculation:

- Numerator – the number of service plans with a “Yes” response to the question “Has the learner successfully completed all goal path requirements identified in the learner plan?”
- Denominator – is the sum of service plans that were closed within the report period. (Displayed in Completions)
- Actual – the percentage of service plans which indicate that learning activities have been successfully completed. (Numerator / Denominator)

### **Progress**

1. Definition: Learner Progress is a measure, during service and at exit of the number of learners who successfully complete at least one required milestone related to their individual goal path.

There is one indicator of learner progress:

- % of Learners who successfully complete at least one Milestone

2. Data Source: Progress is pulled from the Plan Item Details page, Details panel, “Outcome” field, of the plan items under “Competencies” sub-goals. The service plan must have at least one competency, and can be either active or closed.

### 3. Calculation:

- Numerator – is the number of service plans that have at least one competency plan item having an outcome of attained entered during the report period.
- Denominator – is the sum of service plans that were active or closed within the report period.
- Actual – is the percentage of service plans with at least one milestone successfully completed. (Numerator / Denominator)

### **% of Learners who successfully complete at least one Milestone**

1. Data Source: Uses the same data source as Progress.
2. Calculation: Uses the same calculations as Progress for Numerator, Denominator and Actual.

### **Gains**

1. Definition: Gains measures the percentage of learners who show an improvement by at least one point from entrance to exit from the LBS program using the IALSS 500 point scale in prose literacy, document literacy and numeracy using an MAESD approved standardized test.

There is one indicator of learner gains:

- % of Learners who show gains
2. Data Source: Gains is pulled from service plans that are closed and have at least one competency. It is calculated at exit from the LBS program by comparing the entrance and exit Learner Gains scores.

The entrance gains score is pulled from the Client Summary page, Assessment panel, “Learner Gains Score” field.

The exit gains score is pulled from the Modify Plan Closure Details page, Assessment panel, “Exit Learner Gains Score” field.

Note: If either the entrance or exit learner gains score is “0”, then the service plan will not be included in the numerator number.

### 3. Calculation:

- Numerator – the number of service plans where the exit gains score is greater than the entrance gains score by at least one point.
- Denominator – is the sum of service plans that were closed within the report period that were not exempted.
- Actual – is the percentage of learners who show gains (Numerator / Denominator)

### **% of Learners who show gains**

1. Data Source: Uses the same data source as Gains.
2. Calculation: Uses the same calculations as Gains for Numerator, Denominator and Actual.

### **Efficiency**

Efficiency is the final dimension of service quality, and includes one core measure and one indicator. It measures the percentage of the targeted number of learners with an active learner plan who are served.

### **Learners Served**

1. Data Source: Uses the same data sources as New and Carry over detailed below.
2. Calculation:
  - Numerator – is the sum of new learners (those with at least one service plan start date in the current fiscal year) and carry-over learners (those with at least one service plan start date prior to the current fiscal year). Note: should a learner have one or more service plans starting in the current fiscal year and one or more service plans starting prior to the current fiscal year, they will only be counted as a carry-over learner.
  - Denominator – (not displayed) is the Perf Com Ann. Target (Schedule E Learners Served target) which is pro-rated for the report period. The formula to pro-rate the Perf Com Ann. Target is divide the number of months in report period by 12 and multiply the Target by that number.
  - Actual – displays the year to date percentage of new and carry-over learners. The percentage is the sum of new and carry-over learners divided by the pro-rated target. (Numerator / denominator)

## EOIS-CaMS: Service Provider User Guide

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Example: if the Learners Served Perf Com Ann. Target is 100 and the report period is for April to June (3 months), the number of actual learners 35 is divided by the pro-rated target of 25 (3 months divided by 12 months = .25 x 100 = 25) = 140%

The report further groups Learners Served by the following categories for information purposes:

### New

1. Definition: The number of unique learners with service plans created within the reporting period. If there is more than one service plan, then the learner is only counted once.
2. Data Source: New is pulled from the Service Plan Home page, Case Details panel, and "Start Date" field. The service plan must have at least one competency, and can be either active or closed.
3. Calculation:
  - Numerator – the number of unique learners with a service plan start date on or after the start of the fiscal year (April 1) and before the end of the report period.
  - % YTD of Target - displays the year to date percentage of new learners. The percentage is new learners divided by the pro-rated target. To prorate the target for 'New' learners, the carryover numerator should be subtracted from the annual target. Once subtracted, the new target needs to be divided by 12, then multiplied by the number of months since the start of the fiscal year. This is the prorated target for 'New' clients.

Example - if the Learners Served Perf Com Ann. Target is 100 and the report period is for April to June (3 months), with the number of actual learners 35 (7 New and 28 carry over learners), the target adjusted for new learners would be 72. The % YTD of Target for New learners would be  $7 / (72 / 12 \times 3 = 18) = 38.9\%$

### Carry Over

1. Definition: The number of unique learners with a service plan created before the report period and are still active at the start of the report period. Should a learner have a service plan that started prior to the report period and one that started during the report period, they are only counted once as having a service plan starting prior to the report period.

2. Data Source: Carry Over is pulled from the Service Plan Home page, Case Details panel, “Start Date” field. The service plan must have at least one competency, and can be either active or closed.
3. Calculation:
  - Numerator – the number of unique learners with a service plan start date before the start of the fiscal year (April 1), and if closed, with a close date on or after the start of the fiscal year (April 1).

### Service Quality – Phase II - A and II - B

This section of the report outlines the LBS Service Quality Standard and the SDS's performance.

Note: The revised Phase II will be implemented in two stages: Phase II-A starts in 2014-15 and will continue in 2015-16 and 2016-17, and the implementation of Phase II-B is to be determined. Based on a thorough statistical analysis of year-end 2012-13 baseline data, for Phase II-A the Ministry set new as well as revised targets for five of the seven measures within the framework (i.e., all measures except Learner Gains and Completion of Goal Path) and established a new SQS. These targets and standards form the base of the performance commitments within Schedule E of the 2015-2016 and 2016-2017 legal agreement.

#### Column Descriptions

1. Service Quality – Phase II - A and II - B

Lists the dimensions and core measures that are applicable for Phase II - A and II - B.

2. Provincial Value (Prov Value)

The provincial service quality standard value which is set annually by the Ministry. The sum of the provincial standard core measure weighted values is displayed in the cell at the top of the column.

3. Target Value

The service quality target set by the service delivery site displayed as a weighted value. The sum of SDS target core measure weighted values is displayed in the cell at the top of the column.

4. Actual

The year-to-date core measure actual result displayed as a weighted value. The sum of actual core measure weighted values is displayed in the cell at the top of the column.

5. Weight

The weight associated with this measurement for this phase. The percentage achievement against the service quality target set by the service delivery site is displayed in the cell at the top of the column.

### Service Quality – Phase II - A

1. Definition: The LBS Performance Management Framework and Service Quality Standard (SQS) will be implemented in phases. Phase II - A will start in 2014-2015. Data will be collected for all seven measures, however, for Phase II - A service providers will only be held to the SQS set for five of the seven measures.

The standard and related SQS value represents the minimum core measure value a service delivery site should aim to achieve.

2. Data Source: The numbers in the Actual column of Section B, Service Quality – Phase II - A, for “Customer Service”, “Effectiveness” and “Efficiency”.
3. Calculation:
  - Actual – (displayed in the cell at the top of the column)
  - The sum of actual core measure weighted values. (Customer Service + Effectiveness + Efficiency)
  - Weight – the percentage of achievement against the service quality target set by the service delivery site. (Actual / Target Value)

### Customer Service, Customer Satisfaction and Service Coordination

1. Data Source: The service quality core measure actual value is pulled from the Actual column for 1. Customer Satisfaction and 2. Service Coordination in Section A of this report.
2. Calculation:
  - Actual – displays the year-to-date service quality measurement value. (Service Quality Core Measure Actual x Service Quality Weight x 10)

Example – (Customer Satisfaction service quality core measure actual 91%)  $0.91 \times$  (Weight 15%)  $0.15 = 0.1365 \times 10 = 1.37$  + (Service Coordination service quality core measure actual 53%)  $0.53 \times$  (Weight 25%)  $0.25 = 0.1325 \times 10 = 1.33$  for total Value 2.70

### Effectiveness / Suitability and Progress

1. Data Source: The service quality core measure actual value is pulled from the Actual column for 3. Suitability and 5. Progress in Section A of this report.
2. Calculation:
  - Actual - displays the year-to-date service quality measurement value. (service quality core measure actual x service quality weight x 10)



Example – (Suitability service quality core measure actual 19%)  $0.19 \times (\text{Weight } 20\%) 0.2 = 0.038 \times 10 = 0.38$  + (Progress service quality core measure actual 62%)  $0.62 \times (\text{Weight } 30\%) 0.3 = 0.186 \times 10 = 1.86$  for total Value 2.24

### Efficiency / Learners Served

1. Data Source: The service quality core measure actual value is pulled from the Actual column for 7. Learners Served in Section A of this report.
2. Calculation:
  - Actual – displays the year-to-date service quality measurement value. (Service Quality Core Measure Actual x Service Quality Weight x 10)

Example – (Efficiency service quality core measure actual 20%)  $0.20 \times (\text{Weight } 10\%) 0.10 = 0.02 \times 10 = \text{Value } 0.2$

### Service Quality – Phase II - B

Note: Service Quality - Phase II - B is included in this report for information purposes only.

1. Data Source:
  - Customer Service – is the sum of Actual values for Customer Satisfaction and Service Coordination
  - Customer Satisfaction – The value is pulled from the Actual column from 1.Customer Satisfaction in Section A of this report.
  - Service Coordination – The value is pulled from the Actual column for 2. Service Coordination in Section A of this report.
  - Effectiveness – is the sum of Actual values for Suitability, Completions, Progress, and Gains.
  - Suitability – the value is pulled from the Actual column for 3. Suitability (Phase II) in Section A of this report.
  - Completions – the value is pulled from the Actual column for 4. Completions in Section A of this report.
  - Progress – the value is pulled from the Actual column for 5. Progress in Section A of this report.
  - Gains – the value is pulled from the Actual column for 6. Gains in Section A of this report.
  - Efficiency / Learners Served – the value is pulled from the Actual column for 7. Learners Served in Section A of this report.

### 2. Calculation:

- Actual – displays the year-to-date service quality measurement value. (Service Quality Core Measure Actual x Service Quality Weight x 10)

## Allocations and Expenditures

This section of the report compares budget allocations from the agreements' service delivery site Schedule B with the SDS's expenditures captured in closed service plans.

### Column Descriptions

#### 1. Allocations and Expenditures

Lists the Allocations and Expenditures.

#### 2. Allocation

Operating expenses allocated to the service delivery site by the ministry.

#### 3. Year to Date All Participants (YTD All Participants)

Displays the cumulative total of data from closed service plans starting from the beginning of the fiscal year (April 1) to the end of the report period.

#### 4. Number of Clients (# Clients)

The number of clients with Training Supports whose service plan was closed within the report period.

#### 5. Expend

The actual cost of all Training Supports expenditures for service plans closed within the report period, regardless of when the funds were expended.

#### 6. Average Cost (Avg Cost)

The average of expended cost associated with Training Supports.

#### 7. Percentage Allocation Spent (% Alloc Spent)

The percentage of allocated budget spent year-to-date.

### Operational Allocation and Field Support

These figures come from the service delivery site's Schedule B and are included in this report for informational purposes only.

### Training Support

Training support expenses allocated to the SDS. The allocated amount comes from the agreements' service delivery site Schedule B, and the corresponding expenditure values are tracked in CaMS and detailed below.

1. Data Source: Training Support data is pulled from the Plan Content page, "Status" and "Outcome" fields, for the sub-goal "Training Supports". Data is also pulled from the Plan Item Details page, Details panel, "Actual Cost" field of the plan items under the "Training Supports" sub-goal. The service plan must have at least one competency, and must be closed.
2. Calculation:
  - # Clients – the number of service plans with at least one Training Supports sub-goal with a status of "Completed" and an outcome of either "Attained" or "Not Attained".
  - Expend – the sum of actual costs for all plan items under "Training Supports" sub-goals.
  - Avg cost – the average of expended cost associated with Training Support activities. (Expend / # of Clients).
  - % Alloc Spent – the percentage of budget spent year-to-date. (Expend / Allocation).

### Transportation Support

1. Data Source: Transportation Support is pulled from the Plan Item Details page, Details panel, "Actual Cost" and "Status" fields, for the "Transportation" plan item. Data is pulled from the Plan Content page, "Status" and "Outcome" fields, for the sub-goal "Training Supports". The service plan must have at least one competency, and must be closed.
2. Calculation:
  - # Clients – the number of service plans with at least one Training Supports sub-goal with a status of "Completed" and an outcome of either "Attained" or "Not Attained", and at least one "Completed" "Transportation" Plan Item.
  - Expend – the sum of actual costs for all "Transportation" plan items.

## EOIS-CaMS: Service Provider User Guide

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- Avg cost – the average of expended cost associated with Transportation Support. (Expend / # Clients)

### Childcare support

1. Data Source: Childcare Support is pulled from the Plan Item Details page, Details panel, “Actual Cost” and “Status” fields, for the “Child Care Assistance” plan item. Data is pulled from the Plan Content page, “Status” and “Outcome” fields, for the sub-goal “Training Supports”. The service plan must have at least one competency, and must be closed.
2. Calculation:
  - # Clients – the number of service plans with at least one “Training Supports” sub-goal with a status of “Completed” and an outcome of either “Attained” or “Not Attained”, and at least one “Completed” “Child Care Assistance” plan item.
  - Expend – the sum of actual costs for all “Child Care Assistance” plan items.
  - Avg cost – the average of expended cost associated with Childcare Support. (Expend / # Clients)

### Other support

1. Data Source: Other Support is pulled from the Plan Item Details page, Details panel, “Actual Cost” and “Status” fields, for the “Custom Basic Plan Item. Data is pulled from the Plan Content page, “Status” and “Outcome” fields, for the sub-goal “Training Supports”. The service plan must have at least one competency, and must be closed.
2. Calculation:
  - # Clients – the number of service plans with at least one “Training Supports” sub-goal with a status of “Completed” and an outcome of either “Attained” or “Not Attained”, and at least one “Completed” “Custom Basic Plan Item”.
  - Expend – the sum of actual costs for all “Custom Basic Plan Items”.
  - Avg cost – the average of expended cost associated with Other Support. (Expend / # Clients)

### Other Funding

These figures come from the service delivery site’s schedule B and are included in this report for informational purposes only.