EMPLOYMENT ONTARIO EMPLOI ONTARIO

Employment Ontario Employment Service

Reporting: Data Integrity and Data Analysis for Service Delivery Sites

Participant Guide

MTCU Service Delivery Branch

Parker Management Consulting Inc. (PMC Inc.)

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Acronyms

- BI..... Business Intelligence
- CI ..... Continuous Improvement
- EO..... Employment Ontario:
- EOIS ..... Employment Ontario Information System: EOIS
- EOIS-CaMS ..... Employment Ontario Information System CaMS (SDSell out)
- ES..... Employment Service
- ESPMS ..... Employment Service Performance Management System
- PM..... Performance Measures
- PMF ..... Performance Measurement Framework
- PMS..... Performance Management System
- SDS ..... Service Delivery Site(s)
- ES-SDS ..... Employment Service—Service Delivery Site(s) (ES-SDS)

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Introduction

Introduction

Background

The vision of the Ministry of Training, Colleges and Universities (MTCU) is for Ontario to have the most educated and highly skilled workforce in North America to build the province's competitive advantage.

The Ministry invests in the knowledge and skills of Ontarians to ensure they have maximum opportunities for success. Employment Ontario is the strategy to transform Ontario's labour market training and employment system.

Employment Ontario's (EO) service promise is to be the primary source of help and information about employment and training in Ontario. Employment Ontario will:

- Ensure the highest quality of service to help individuals meet career or hiring goals;
- Provide opportunities to make it easier for individuals to improve their skills through education and training;
- Ensure that no matter which Employment Ontario office an individual goes to they will get the help they need; and
- Work with employers and communities to build the highly skilled, highly educated workforce Ontario needs to be competitive.

One component of the Employment Ontario Service Delivery Framework is Employment Service (ES)[1]. ES is an outcomes-based employment program whereby Ontarians are supported to find sustainable employment. ES bridges the gap between individuals seeking employment and employers seeking people with the skills to meet their business needs.

ES is designed to be customer-focused, effective, and efficient and is delivered by a network of third-party Service Delivery Sites (SDS). With the expertise and local knowledge of service providers, ES provides the most appropriate service to individuals and employers to reach the best outcomes. To ensure all government services are delivered consistently to standard throughout Ontario, the Ontario Government relies on Performance Management Systems (PMS) to support high quality customer service and outcomes in a manner that is transparent and accountable.

[1] For more detail see the Employment Service Service Provider Guidelines.
http://www.tcu.gov.on.ca/eng/eopg/publications/2012_13_eopg_sp_guidelines.pdf

Expectations for 2012–2013

The recently completed 2012–2013 Business planning process is a key component of ESPMS as it enables the ongoing effective management and success of the SDS and ES as a whole. It also provides SDS with the opportunity to reflect upon achievements to date, consider opportunities for improvement and to continue to deliver efficient, effective, customer oriented Employment Services.

Achieve Contracted Commitments

The expectations for 2012–2013, and beyond, is for all ES SDS to:

- Meet or exceed ES Service Quality Standard (SQS);
- Demonstrate organizational capacity for long term sustainably of ES;
- Demonstrate compliance with the MTCU agreement and ES Service Provider guidelines;
- Achieve continuous improvement targets as outlined in the 2012–2013 Business Plan; and
- Achieve all of the above within the 2012–2013 fiscal year.

Integrate Continuous Improvement

In their 2012–13 business plans, SDS defined three key strategies they will implement to continuously improve the delivery of ES and achieve employment outcomes. In 2012–2013 and beyond, SDSs must integrate continuous improvement processes into the day-to-day delivery of employment services. This means on an ongoing basis SDS must:

- Understand the results achieved to date;
- Understand the cause of the achieved results; and
- Develop and adjust strategies for improvement.

This continuous improvement process integrates the use of performance measurement and planning into the fabric of an organization's infrastructure. It does so in a clear and consistent manner and supports the achievement of results "on purpose".

Collect Quality Site-Level Data

MTCU expects SDS to collect, monitor, analyze and report data for the purpose of continuous improvement. To plan effectively, SDS and MTCU require real, accurate and verifiable data to make informed business decisions. As ESPMS is evidence-based eventually MTCU may adjust baseline standards to reflect changes to system-wide performance and confirm any new performance baselines for the following year. However it is not possible to make adjustments to standards until MTCU and service providers are fully confident that there is integrity in the data.

Data integrity is defined as "completeness, consistency, timeliness and accuracy" of data entered into the EOIS-CaMS, other SDS systems and hard copy client files. Data must be reliable, accurate, complete and relevant in order to make evidence-based decisions. As the "business owners of data" SDS are responsible for the verification and integrity of data at a site level. Although managers may not require data for all their day-to-day tasks, understanding data and how it is used increases the SDS ability to link information, performance, and strategy more effectively.

The value of the information contained in operational and performance reports is only as good the data input into EOIS-CaMS. To ensure high quality, correct, consistent and accessible data all users of EOIS-CaMS must have a consistent understanding of data definitions, data entry processes and the EOIS-CaMS system. Without consistent understanding users may depend unduly on their own interpretation and small discrepancies may occur. These discrepancies can make a significant difference in the quality of data at the local level and, more pervasively, as it is aggregated at the provincial level.

Exercise

On a scale of 1–5 (1 low confidence – 5 high confidence), how confident are you that, at this point and time, the data entered into CaMS is valid (accurate) and reliable (consistent results over time)?

	1	2	3	4	5
At your service delivery site?					
At an aggregated level, across the provincial ES provider network?					

What issues need to be addressed to increase your confidence?

At your delivery site?

At an aggregated level, across the provincial ES provider network?

Data integrity issues are often related to one or more of these three areas.

- Technology (e.g. hardware and software)
- Processes
- People

Which one of these areas, if improved, would have the most impact to improve the integrity of the data?

Purpose of Training

This training is intended to build on ESPMS for Service Delivery managers training from 2011[2]. This one-day session will support SDS to build capacity related to business intelligence, more specifically, improving the quality of data entered into Employment Ontario Information System-CaMS (EOIS-CaMS) and improving data analysis so MTCU and service providers have verifiable data to make solid business decisions.

By the end of the session participants will:

- Understand the importance of data integrity to the whole Performance Management process;
- Understand what "business intelligence" (BI) entails and their BI roles and responsibilities;
- Understand how the data collected in EOIS-CaMS is used to evaluate site performance and to make appropriate business decisions at the SDS, regional and provincial levels
- Recognize the importance of performing and service delivery analysis; and
- Understand the resources available to support data integrity and data analysis (DSQ and other reports, data dictionary, indicators and measures document and other resources on EOPG re: EOIS-CaMS).

[2] This training package is available at http://www.tcu.gov.on.ca/eng/eopg/publications/20110619_es_pms_sdsm_training_guide.pdf

Agenda

This training will go from a macro to micro view and will include:

- MTCU expectations for 2012–2013;
- The key concepts of ESPMS;
- ES model and the Client Pathways;
- Data Integrity;
- Data Analysis; and
- Summary.

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Unit 1: Key Concepts

Unit 1: Key Concepts

By the end of this Unit SDS participants will:

- Understand MTCU's expectations for 2012–2013;
- Understand how the data collected into CaMS is used to evaluate site performance and to make appropriate business decisions at the SDS, regional and provincial levels;
- Recognize the ES customers are at the centre of the system;
- Understand the components of the PMS: Performance Measurement Framework; Continuous Improvement and Business Intelligence;
- Understand the dimensions of the Performance Measurement Framework (PMF):
  - Service Quality Standard (SQS) and related dimensions, core measures and indicators;
  - Dimensions of organizational capacity (OC): measure, plan, communicate, resource;
  - Continuous Improvement process: understand results, understand cause, develop improvement plans, review and adjust plans; and
- Understand what "business intelligence" (BI) entails and the SDS's BI roles and responsibilities.

Performance Management in the Ontario Public Service (OPS)

Performance Management is an outcomes and evidence-based process that is comprehensive and government-wide that informs decision making and ensures that funded activities align with government priorities. **This allows for comprehensive reporting and analysis of the results of those investments over time.**

Government needs to have a clear idea on the Return on Investment (ROI) to show the people of Ontario what they are getting for their dollar. ROI is about the impact on clients and communities, not just about sound financial controls. Ontarians expect a demonstrable link between government interventions and positive outcomes for dollars spent.

The Ontario Government is committed to multi-year, priority driven, performance management, where results are integrated with budgeting, where explicit performance targets are set and where there is regular reporting on progress. Every year, every Ontario Ministry has to commit to measurable outcomes and report results on a quarterly basis.

Managing performance is not only about "controlling activities", it's also about "controlling results". This is not unique to Government; research indicates that performance management is part of the foundation of successful, sustainable organizations, regardless of the sector.

What is Performance Management?

An outcomes-and-evidence-based Performance Management System in a continuous improvement model enables strategic and consistent decision making at the local, regional and provincial program levels. Performance Management:

1. Is a clear, strategic system for managing in a way that provides maximum benefits for clients, employers, communities and MTCU while ensuring resources are being effectively allocated and managed.
2. Is a system in which MTCU management and staff, service providers and clients have the same understanding of what's important, what's expected, and the incentives and consequences.
3. Is an MTCU enterprise-wide approach that builds organizational capacity in the regions to deliver and manage quality customer services, either directly or through a third party.

4. Identifies clear measures and standards of program performance and transparently links them to funding and business decisions.
5. Informs change in all organizational business systems, for MTCU and service providers, such as: Information Management System (IMS) development, program contract and administration, human resources development, organizational development, program design, development and evaluation.
6. Supports ongoing program development and innovation, priority setting (what gets measured gets improved), resource allocation (what gets measured, get funded) evidence-based problem solving and decision making and continuous improvement based on data driven decisions.
7. Enables local planning, decision making and accountability and ensures the integrity of a provincial framework of commitments, measurements and standards.
8. Enables strategic program and Service management: formalizes the use of evidence (valid and reliable data) in fulfilling government commitments.
9. Ensures results are assessed against consistent factors: customer service, effectiveness and efficiency, which improves service to all customers.

The Customer is at the Center of the System

It is important for SDS to always be cognizant of the fact that ES is a customer-focused, outcome based service. Although there are many very important stakeholders, the service delivery revolves around two primary customers[3]: clients[4] and employers. Clients and employers access ES because they require support and trust the SDS is able to deliver on results-promised: effective, efficient and customer oriented services. This does not mean that the SDS must respond to every whim and wish of the clients and employers, it means that the SDS must engage them to determine their needs (rather than wants) and deliver timely and appropriate solutions to address their needs and/or refer to other service providers if appropriate. A collaborative relationship with clients and employers, where all parties understand roles and responsibilities, expectations and boundaries, is critical.

[3] Primary customers are defined as "the person(s) or organization(s) without whose support your program would cease to exist".
[4] "ES provides access to the labour market and employment resources to all Ontarians. However, the assisted services are designed to target vulnerable populations, those under-represented in the labour market. Using the suitability criteria…service providers will target and outreach to people at the greatest risk of continued or long term unemployment, or those who are marginalized in the labour market." ES Guidelines 2.1-1

Another important primary customer to the SDS is MTCU. MTCU has made significant financial contributions to the ES delivery network and is committed to building a consistent, quality, sustainable ES across the Province. SDS agreements and Guidelines clearly outline MTCU's expectations and success measures, define the roles and responsibilities of the service provider and MTCU[5] and highlight the importance of working in collaboration to increase service excellence.

Roles

MTCU:

- Defines the service, sets baseline standards for service delivery and quality;
- Develops the community service plan; and
- Ensures transparency and accountability.

Service Provider:

- Delivers services in accordance with the MTCU agreement, service guidelines performance and accountability requirements, standards and the community service plan;
- Manages resources; and
- Manages business systems and processes.

Shared responsibilities include:

- The ongoing review and evaluation of service design, performance management framework and customer service expectations;
- Raise the level of service quality across the province so that all Ontarians have access to high quality services; and
- Identify leading edge and innovative practices in service design, delivery and performance management.

[5] More detail about these roles can be found in ES Service Provider Guidelines.

Above and Below the Waterline

The "iceberg" analogy is used to demonstrate the customer service experience and organizational capacity. Similar to an iceberg, what the customer sees is "above the waterline"—these are the products and services SDS deliver to respond to customer needs—it is the service location, the services delivered, customer service practices, etc. Within a Performance Management System this includes performance measures within the performance measurement framework.

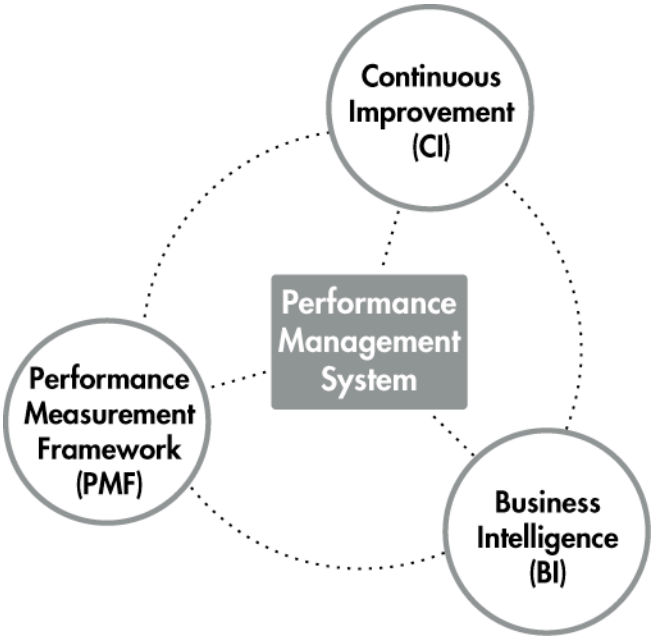
Similar to an iceberg, the largest part, typically 90%, is "below the waterline", it is the solid business foundation of the SDS, or organizational capacity (i.e. business systems involving people, technology, processes), to deliver on commitments to customers and to deliver sustainable customer focused, effective and efficient services.

If SDS appropriately and consistently manage business systems "below the waterline" the "above the waterline" customer experience tends to look after itself.

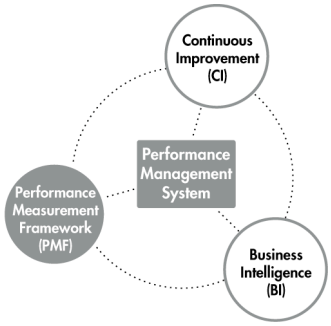
In the context of this training, it is the ability of the SDS to collect and use data to assess activities and results and make solid business decisions to continuously improve ES "below the waterline."

The Components of a Performance Management System

A performance management system includes three inter-related elements:



The Performance Measurement Framework (PMF)



The Performance Measurement Framework (PMF) includes dimensions of service delivery and core measures to assess service provider performance and the overall performance of ES. In a mature model, standards will be based on verified data about what is being delivered provincially, not on what should be delivered.

A provincial PMF means that performance measures, data indicators, data definitions and data sources are the same for every service provider agreement. This does not mean that there is a "cookie cutter" approach to the delivery of ES. In fact, ES was designed to be flexible so service providers can respond to the unique needs of their clients, employers and communities.

Performance Measurement is important because[6]:

- What gets measured, gets done;
- If you don't measure results you can't tell success from failure;
- If you can't see success, you can't reward it;
- If you aren't rewarding success, you are probably rewarding failure;
- If you can't see success you can't learn from it;
- If you can't recognize failure you can't correct it; and
- If you can demonstrate results you can win public support.

The PMF includes three components which are used to measure the quality and sustainability of the Employment Service. These are:

1. Service Quality Standard.
2. Organizational Capacity.
3. Compliance with MTCU Agreement and ES Guidelines.

[6] From the Ontario Public Service (OPS) Performance Measurement Guide.

1. The Service Quality Standard (SQS)

The performance of the service provider and the overall quality of ES is not measured by an exclusive focus on activity and intake, results, expenditures, or customer satisfaction. Success is measured by a combination of:

- Who is served (i.e. profile of suitability);
- What happens to them (i.e. outcome or impact of service);
- How well individuals and employers think they have been served (service coordination and customer satisfaction); and
- The value for the investment (efficiencies).

Therefore the SQS calculation includes **dimensions** of service success weighted to reflect their contribution to overall quality:

- Effectiveness: measured by whom ES serves and the impact of the service received;
- Customer service: measured by how satisfied clients and employers are with the ES and how well the ES is integrated into each community; and
- Efficiency: measures the extent to which resources are used appropriately to achieve the commitments set out in the Schedule B.

Each dimension has core measures nested within it and are weighted to demonstrate value and to "tell a story" about the quality of ES delivery i.e. a measure of who participates in the service evaluates whether or not the program is serving the intended client group. The SDS ES agreement includes a Schedule B which includes performance expectations related to core measures.

- Customer Service:
  - Customer Satisfaction of the client/participant and employer
  - Service Coordination
- Effectiveness:
  - Outcomes: Employment/Career Path, Training/Education
  - Suitability (i.e. participant profile)
- Efficiency:
  - Activity in Assisted Services
  - Activity in Workshop Activities/Information Sessions

Each core measure includes **data indicators** i.e. consistent, reliable and verifiable data that nest within and support each core measure; these include indicators related to the intended client group such as age, education and work experience.

The Schedule B of the SDS agreement identifies the SDS commitments and defines standard performance measures and the standard overall service quality indicator. The data indicators are defined by MTCU and SDS enter data in CaMS related to the indicators; service quality reports include information on these data indicators which are used to monitor performance.

2. Organizational Capacity

All successful, sustainable organizations, regardless of business sector, have a solid business foundation, or organizational capacity (OC), to provide and sustain effective, efficient and customer oriented services. MTCU expects SDS to demonstrate that the following OC dimensions are woven into day-to-day operations:

- **Plan:** develop, implement, monitor and modify action plans to achieve stated goals and to meet MTCU contracted commitments. ES indicators include demonstrated use of data;
- **Measure:** evaluate success against the business plan, the Ministry's program agreement, guidelines, service quality standards, documentation standards, and policies and procedures. ES indicators include customer satisfaction and results management and service delivery.
- **Resource:** allocate and develop resources (i.e. administration, finance, human resources and information technology) to achieve stated goals and to meet contracted commitments with MTCU. ES indicators include: administrative processes and financial performance results;
- **Communicate:** interact with staff, the Ministry and with the community in terms of issues, policies and programs that affect clients and community. ES indicators include community coordination and governance; and

ES Guidelines[7] highlight **OC as it relates to collecting, monitoring and analyzing data** for the purpose of continuous improvement as highlighted in the following chart:

Dimension	OC Indicator	Definition
Plan	Demonstrated use of data	The SDS has evidence that non-financial data is analyzed and evaluated to make both short and long term programmatic/service changes that reflect local labour market and community needs.
Measure	Results management	The SDS has systems and processes in place to track performance against agreements and commitments and standards.
Resource	Administrative processes	The SDS has administrative systems in place (Admin, finance, HR, IT) that support the organization's business commitments to customer service, quality and operational performance.
Communicate	Governance	The service provider has evidence of governance structure which has process/policies in place to ensure accountability to funders, clients, community and its own staff.

While OC is an inherent dimension of ESPMS, it contributes indirectly to the measureable standard of overall service quality.

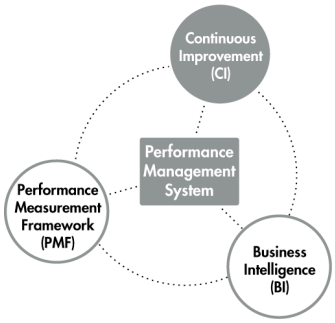
3. Compliance to the Agreement and ES Guidelines

All SDS have an agreement with MTCU and are expected to achievement the commitments, in-year, and within budget. ES Guidelines provide extensive information regarding MTCU's expectations of service delivery.

These three elements highlighted in the PMF, plus the achievement of improvement targets as outlined in the annual business plan, form the evaluation framework which allows SDS and MTCU to evaluate and continuously improve ES.

[7] See ES Service Provider Guide 2.5.6.

Continuous Improvement (CI)[8]

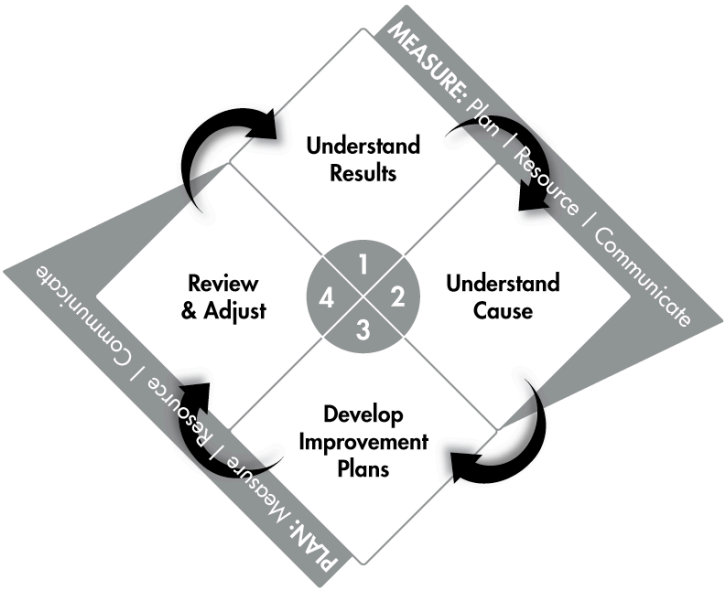


Continuous improvement is the integration of performance measurement and business planning into the daily operations of an organization. Its purpose is to continuously seek to improve the quality of service, and if implemented in a clear, consistent way, it will enable even the strongest performing SDS to continue to improve.

The 2012–13 business plan describes ES CI process as a logical sequence of actions which allows SDS and MTCU to:

- Review and analyze key results, not just activities and processes;
- Conduct gap and impact analyses to inform future investment; and
- Conduct forward-looking planning for improvement and make changes based on actual results.

ES Guidelines note the following four steps in relation to the annual business plan, however, these are standard steps which can be used for formal and informal planning at micro and macros levels. The four steps of CI are:



[8] ES Service Provider Guidelines, Continuous Improvement in the Ministry's Business Planning Cycle, 2.8-1.

Step 1: Understand Results

The objective of this step is for the SDS to obtain a clear understanding of its actual results, areas of strength and areas that need improvement. The SDS must review past performance and compare those results with MTCU's standards, the annual business plan targets and network benchmarks. The SDS should solicit feedback from primary customers, partners and other key stakeholders to obtain a clear view of customer needs and the service provider's areas of strength and improvement.

Actions may include:

- Review results against provincial standards and contracted goals for the year (based on Schedule B commitments);
- Understand the context of standards;
- Targets are initially set to establish baseline data; and
- Standards are developed based on actual data.

Step 2: Understand Cause

The objective of this step is for the SDS to understand why the SDS is or is not achieving results and to identify possible causes for these results. Causes are to be either business processes or management processes that, if changed, could improve outcomes. Causes are not external factors beyond the control of the Service Provider.

Actions may include:

- Consider the cause of results;
- Identify actions taken to achieve the results;
- Identify external impacts that affected the SDS operation both positively and negatively;
- Identify outcomes that are higher than provincial standard;
- Identify causes of results below provincial standard; and
- Assess strengths, gaps and variances to decide what to continue, reinforce and/or change.

Step 3: Develop Improvement Plans

The objective of this step is for the SDS to develop a plan to improve results based on understanding strengths and opportunity areas.

Actions may include:

- Review factors that impact the operation of the SDS and generated the results achieved;
- Identify areas for improvement; and
- Incorporate action plan(s) to realize improvement as part of the overall business plan.

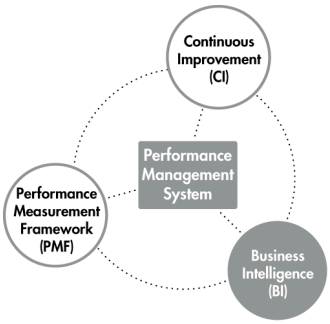
Step 4: Review and Adjust

The objective of this step is for SDS to assess progress toward desired outcomes and to take corrective action as necessary (and of course, to celebrate successes!).

Actions may include:

- Review internal results and compare them with the target levels of performance as described in the annual business plan;
- Submit quarterly reports on achievement accomplished;
- Outline adjustments required to achieve commitments; and
- Develop adjustment plans where necessary to respond to changes and to achieve business plan targets.

Business Intelligence (BI)



There are three inter-related components of business intelligence capacity: technology, business processes and people.

Technology includes an information management system, clear business rules and regular reports that support analysis of actual data against performance standards and planned targets and the ability to "mine" data for further analysis.

Processes: include, but are not limited to:

- Performance-based business planning/submission processes linked to performance against standards and continuous improvement;
- Performance-based management decision models—(i.e. service selection and funding decisions models linked to performance); and
- Policies and procedures related to the collection and analysis of data.

People: This includes the capacity of the human resources within the SDS sites to:

- Know what data to collect and why it is collected;
- Collect the data with integrity;
- Locate data reports;
- Analyze data; and
- Make evidence-based decisions to continuously improve ES.

The raw data entered into CaMS at a user level impacts the ability of SDS and MTCU to assess performance and make good business decisions going forward. If the data entered is not valid and reliable, data analysis is futile and continuous improvement plans will be ineffective.

While MTCU continues to focus on improvements to the technology—EOIS-CaMS—to support business intelligence (version 3.0 will be released in April 2012), SDS needs to strengthen business intelligence capacity as far as processes and people are concerned. This starts with ensuring that the SDS ES team has a clear and consistent understanding of ES and how performance is measured.

Exercise

As discussed, it is the responsibility of the SDSs, as the "business owners of data", to ensure data collected then entered into CaMS is accurate and complete. What quality assurance (QA) checks and balances does your SDS have in place prior to closing a CaMS service plan?

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Employment Ontario Employment Service

Reporting: Data Integrity and Data Analysis for Service Delivery Sites

Unit 2: The ES Model and The Employment Service Plan

Ontario

Unit 2: The ES Model and The Employment Service Plan

By the end of this Unit participants will:

- Understand the three components of ESPMS: PMF, CI and BI;
- Understand that performance measurement is based on three dimensions of service delivery success (Customer Satisfaction, Effectiveness and Efficiency);
- Explain how the three dimensions, as well as the seven associated core measures, are connected;
- Understand how these core measures are used to calculate the Service Quality Standard;
- Be able to identify the indicators and how they are used to calculate each core measure;
- Comprehend the relationship between the dimension, measures and indicators by identifying the source of the information within the CaMS system; and
- Understand their responsibilities as the "business owners of data."

The Employment Service and Data

In outcomes-based services it is sometimes difficult to understand the importance of data integrity especially when it seems that data related tasks take time away from serving clients. Collecting data efficiently and accurately is part of building organizational capacity (OC) "below the waterline" but it shouldn't be done at the expense of customer service. In fact, collecting valid and accurate data supports increased customer satisfaction especially when the data is translated into knowledge and used to make quality, evidence-based service decisions.

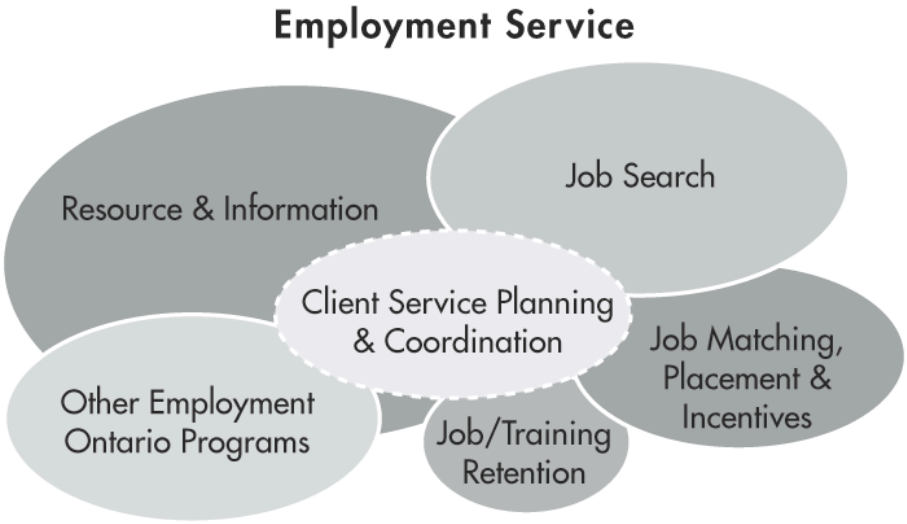
A clear understanding of ES model and the related key customer service decisions is an important first step on the path to data integrity by understanding data definitions.

Exercise

What are the primary decisions that need to be made in the delivery of the ES as a whole?

-
-
-
-
-
-

Many decisions are made at the client service level. Which component of ES includes the primary client decision making function?



Client Service Planning and Coordination (CSPC) is a key component of ES process and **is embedded in all components of ES**, including Resource and Information (RI) and all Assisted Services (AS). It enables **service decisions, service monitoring, service coordination, referrals, follow-up and exit**. CSPC determines which components of ES are appropriate, monitors and adjusts ES plans and supports clients to access to other EO programs and services and government and community services outside of EO.

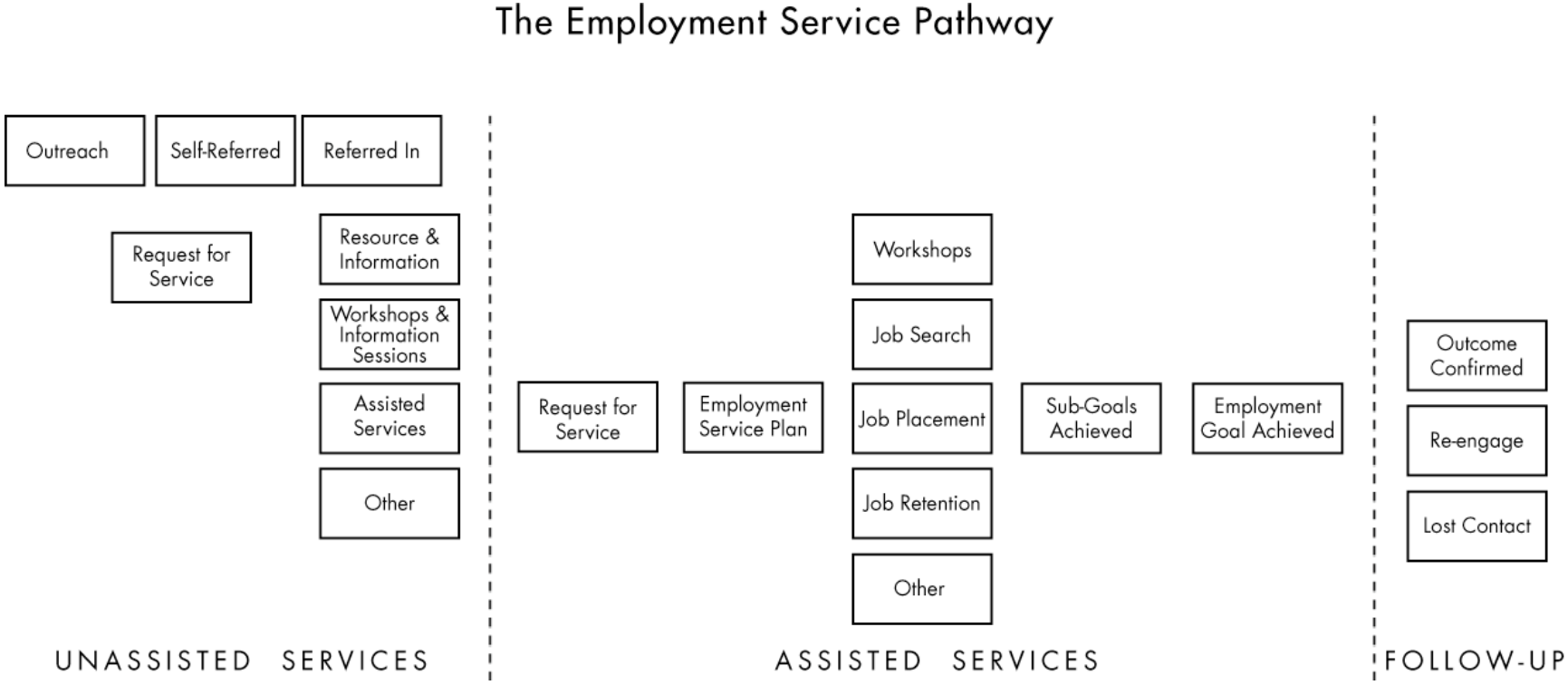
There are two primary service pathways[9] in ES: ES **Resource and Information (RI) Client Pathway** (self-serve and group workshop/information session) and ES **Assisted Services (AS) Client Pathway**.

[9] http://www.tcu.gov.on.ca/eng/eopg/publications/20110301_es_client_pathways.pdf
Note: blue-filled boxes indicate "ES performance management considerations" the purple outlined boxes indicate "EOIS CaMS considerations". (See pathways document for more information.)

Confidential, not for distribution purposes

Exercise

Mark the decision points for the RI and the AS Client Pathway:



Although this diagram is linear, real client service "pathways" are not, as each client's pathway will be driven by his/her need and will be unique according to individual circumstances. Note that CSPC must be woven into both the RI and AS pathways, therefore, SDS must have a **client service decision model** which demonstrates the capacity to make **consistent and equitable service decisions** using multiple eligibility and suitability criteria and provide a rationale for all service decisions such as:

- Individuals' employability dimensions i.e. interpersonal skills, work history and educational attainment;
- Individuals' suitability indicators;
- Potential employer demands; and
- Opportunities available within the labour market e.g. job/training opportunities, labor market trends in the community/region.

The purpose of gathering this information is **to assist the SDS and the client to uncover service needs and to design an appropriate service response that connects the client to the labour market as appropriately and as quickly as possible**.

The client is a key contributor to all service decisions and must be actively engaged in the service decision process. A key decision, led by the SDS, is whether unassisted or assisted services would most benefit the client. If AS, the SDS must work with the client to develop the ES plan based on more in-depth analysis and assessments. The ES plan will incorporate, as appropriate, concurrent or sequential AS components; the ES plan may evolve as client needs change and as new opportunities arise e.g. a job trial may reveal that new sub-goals and plan items are required. With AS the SDS must:

- Develop an Employment Service Plan in collaboration with the client based on need;
- Facilitate the progress of the client by providing information and guidance; and
- Support, monitor and follow-up clients.

Below the Waterline Opportunity

The service decision model is a critical component of the CSPC as it informs service decisions.

Points to Ponder:

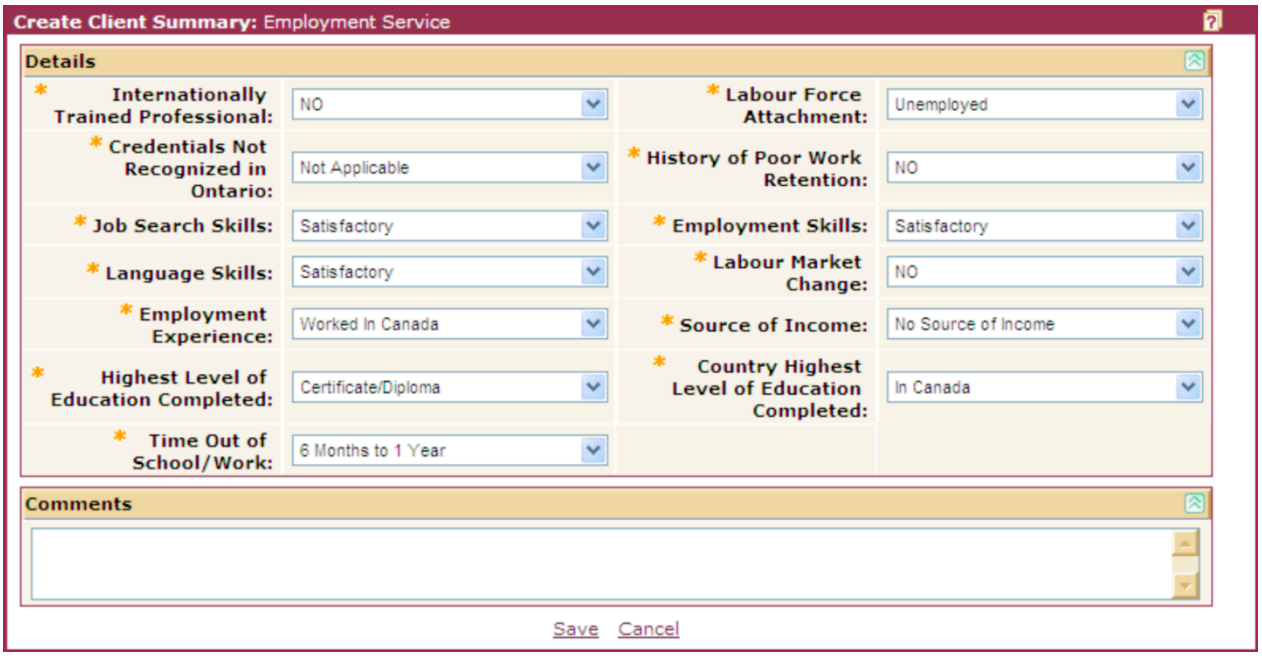
- Do the client pathways at your SDS align with the requirements as outlined in ES guidelines?
- What are your key decision points?
- What is the purpose of each decision point?
- Who needs to be involved in the decision?
- How will you know your decision was the right one?
- What products and processes does your SDS have in place related to the Service Decision Model?
- How do you ensure the Service Decision Model is applied consistently across your SDS?
- How do you **measure** the effectiveness of the service decision model?
- How will you know if it is time to **adjust** your decision model?

EOIS-CaMS and the Assisted Service

Assisted Service (AS) CaMS data entry begins when a client service plan is entered by the service provider and ends when that service plan is closed by the service provider[10]. Client data includes:

The Client Summary

The client summary entered into CaMS is a snapshot of the client suitability Indicators.



The above choices are eleven of the fourteen ES suitability indictors; the other three are age, person with disability and aboriginal group which are entered when the service plan is created.

[10] CaMS Service Provider User Guide Chapter 8: Service Plan Management.
http://www.tcu.gov.on.ca/eng/eopg/eotransformation/cams_day1/userguide/eois_cams_ch8_sp_management_es_sjs.pdf

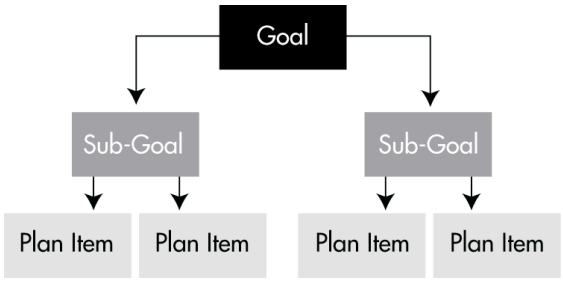
The Employment Service Plan

The Client Service plan is used by SDS to plan, in an integrated manner, the delivery of services and activities to assist a client in achieving a specific goal. Service plans are based on a service planning methodology that relies on a comprehensive, outcome-based model. This approach helps service providers focus on achieving a desired outcome for the client, provide the tools necessary to construct the plan and then to track and monitor progress.

CaMS allows SDS staff working with clients to:

- Identify what must be done to meet the program goals;
- Create a plan of supportive activities to help clients meet those goals;
- Document a history of activities previously provided; and
- Track their progress in meeting those objectives.

In CaMS, Employment service plans are organized by **goals**, **sub-goals** and **plan items**[11].



The goal is the overall outcomes that the service plan is designed to achieve. For example, the goal of any ES service plan is **"sustainable employment"**.

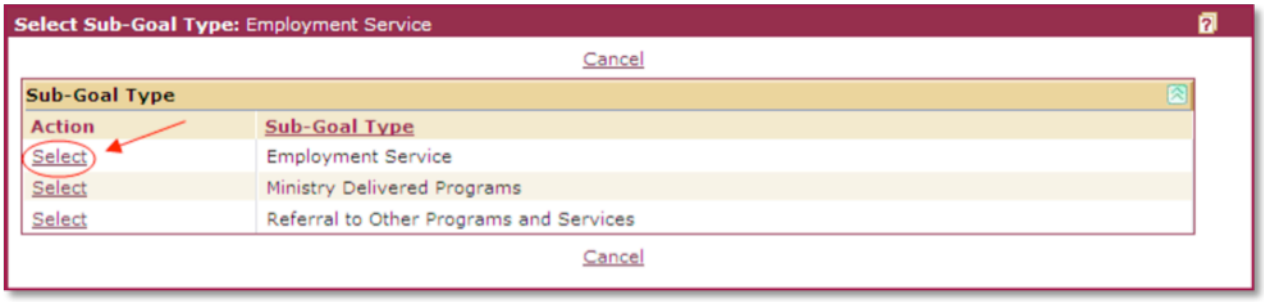
Sub-goals break the main goal down into more Specific components. The "sustainable employment" goal may include sub-goals such as Job Search, Job Matching and Placement, and Job Retention. A service plan may have one or more sub-goals.

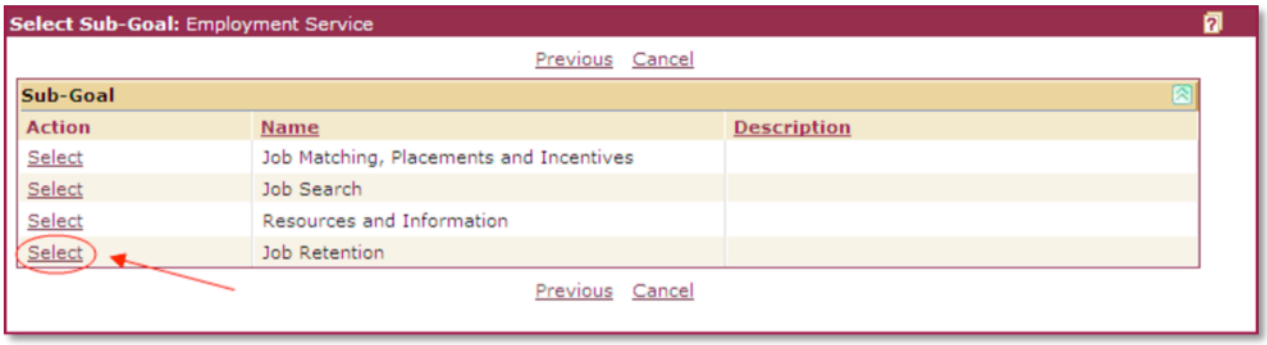
Plan items are the specific services, benefits and activities that will help the client realize the sub-goal. For each plan item it is possible to record the cost, start and end dates, and outcome. This allows the SDS to track the client's progress and the overall effectiveness of the service plan.

[11] CaMS Service Provider User Guide Chapter 8: Service Plan Management.
http://www.tcu.gov.on.ca/eng/eopg/eotransformation/cams_day1/userguide/eois_cams_ch8_sp_management_es_sjs.pdf

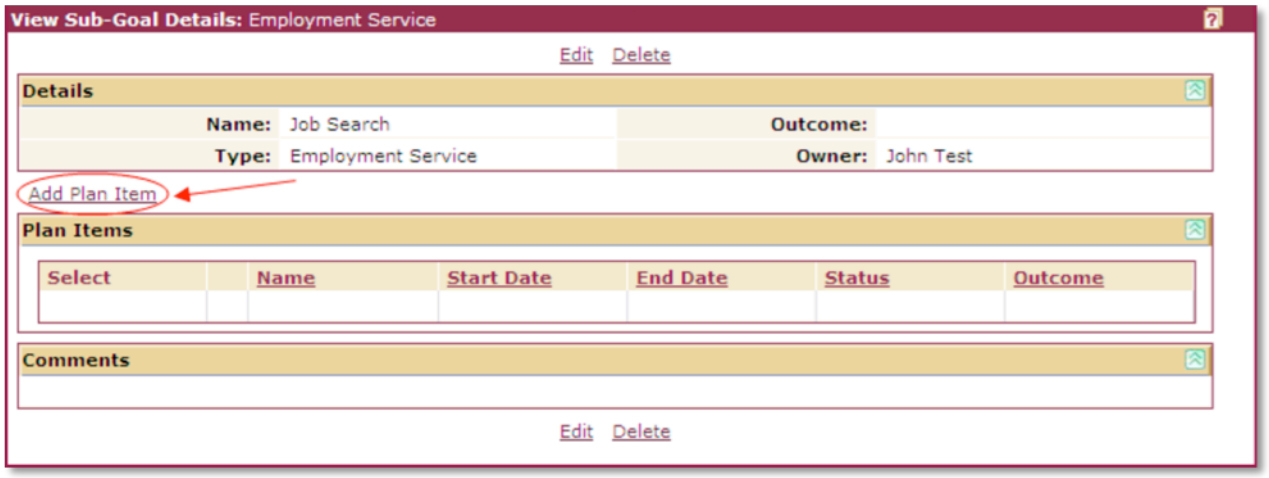
The following screen shots identify the **sub-goal** and a sample of **plan items** related to the sub-goal of "Job Search."

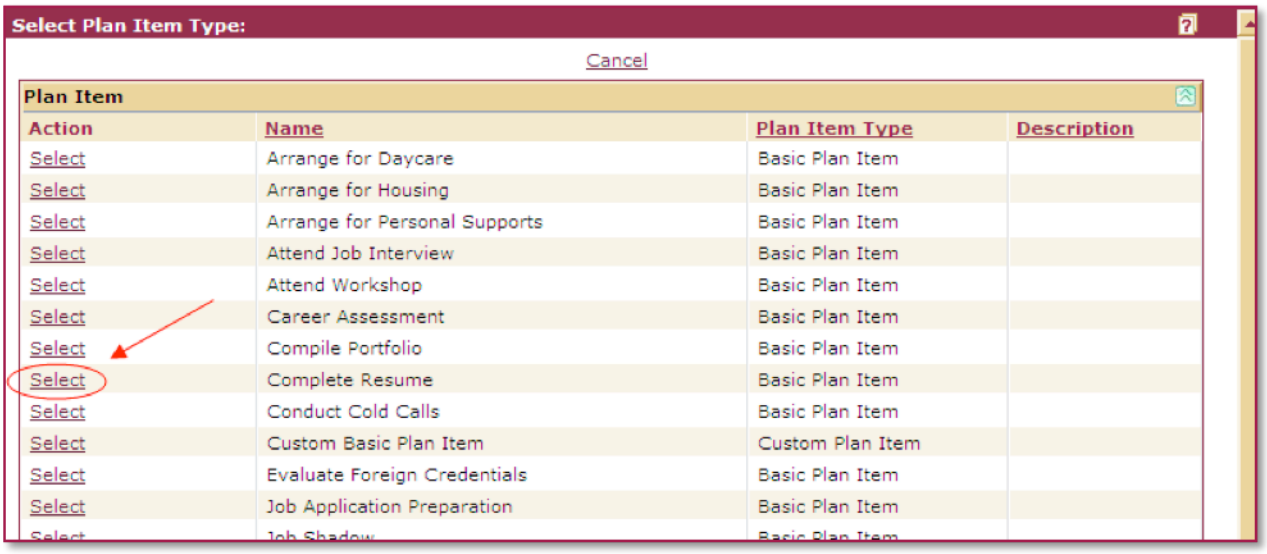
Sub-Goal Type





Sub-Goal Within the Sub-Goal Type





The Plan Summary

The plan summary is a mandatory element for every service plan. It shows the structure of the plan and lists the services and activities the plan includes. The SDS and the client agree to undertake the activities as outlined in the service plan to achieve the goal. The client's acceptance of the plan implies a commitment to fully participate in the activities set out in the service plan. This acceptance is important for executing the plan successfully.

As mentioned, service decisions inform the development of ES plans and, ultimately, the achievement of positive outcomes. To make appropriate service decisions, SDSs must:

- Gather relevant client information from multiple sources;
- Decode/organize this information;
- Analyze the information collected to obtain a clear picture of the client's situation; and
- In collaboration with the client and colleagues, select the most appropriate combination of services, as outlined in the ES plan, with the goal of achieving desired outcomes.

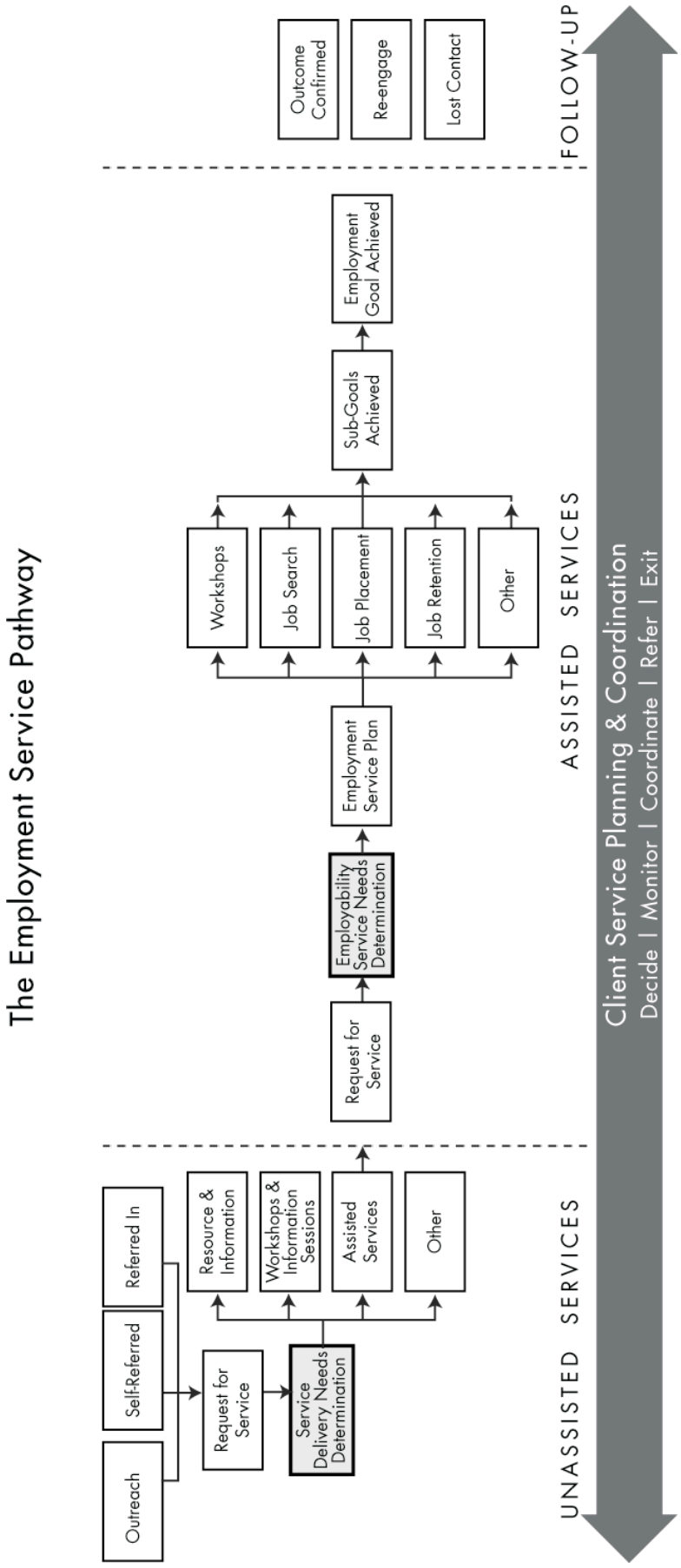
For MTCU and SDS to be confident that the data in CaMS, and in reports, is valid and reliable, all SDS staff delivering ES service, including those entering data into CaMS, must have a consistent understanding of:

- ES pathway and related service components;
- The dimensions and measures related to ES service quality; and
- The data indicators related to each measure.

Employment Service Client Pathway

This next version of the ES Client Pathway highlights:

- The client service flow from the moment a client accesses ES to exit and follow-up;
- The client service decision points; and
- ES service components/interventions. For AS clients, these service interventions, or plan items, will be outlined in ES Service Plan.


The Employment Service Pathway
UNASSISTED SERVICES
ASSISTED SERVICES
FOLLOW-UP
Client Service Planning & Coordination
Decide | Monitor | Coordinate | Refer | Exit
Outreach
Self-Referred
Referred In
Request for Service
Service Delivery Needs Determination
Resource & Information
Workshops & Information Sessions
Assisted Services
Other
Request for Service
Employability Service Needs Determination
Employment Service Plan
Workshops
Job Search
Job Placement
Job Retention
Other
Sub-Goals Achieved
Employment Goal Achieved
Outcome Confirmed
Re-engage
Lost Contact

Ontario

Exercise: Client Suitability and Employment Service Plan

The purpose of this exercise is to ensure all participants understand the connection between client suitability and the employment service plan. What might you expect to see in the Employment Plan?

Client Suitability Indicators	Other Employability Issues?	Sub-Goals	Plan Items
Client 1 • Age: >44 • Education: <= Grade 12 • >26 weeks time of out school/work • History of poor work retention • Job Search Skill • Labour market change			
Client 2 • Educated outside Canada • Credentials not recognized • Worked, but not in Canada		—	

Below the Waterline Opportunity

Review ES Service Provider Guidelines[12] with your whole ES team (specifically Section 3) which outlines ES components and MTCU's expectations (or "musts") related to each of the five ES components:

Discuss:

- What does MTCU mean by each component?
- What are we doing now? Is it working? Can we prove it? How do we know if we are doing it well?
- What do we need to "stop" doing?
- What do we need to "start" doing?
- What do we need to "continue" to do?

If necessary, develop an improvement plan.

[12] ES Service Provider Guidelines http://www.tcu.gov.on.ca/eng/eopg/publications/2012_13_eopg_sp_guidelines.pdf

EMPLOYMENT ONTARIO EMPLOI ONTARIO

Employment Ontario Employment Service

Reporting: Data Integrity and Data Analysis for Service Delivery Sites

Unit 3: Data Integrity

Unit 3: Data Integrity

At the end of this Unit participants will:

- Understand the importance of data integrity to the whole Performance Management process; and
- Understand how the data collected into EOIS-CaMS is used to evaluate site performance and to make appropriate business decisions at the site-level and at the provincial level.
- Understand the types of ES reports available and their usage

Overall ES Service Quality

The performance of SDS and the overall quality of ES is not measured by an exclusive focus on activity, intake, results, expenditures or customer satisfaction. SDS and MTCU measures success by a combination of:

- Who is served (i.e. profile of suitability);
- What happens to them (i.e. outcome or impact of service);
- How well individuals and employers think they have been served (service coordination and customer satisfaction); and
- The value for the investment (efficiencies).

Therefore, overall quality is measured by a combination of:

- Effectiveness: measured by whom the ES serves and the impact of the service received;
- Customer service: measured by how satisfied clients and employers are with the ES and how well the ES is integrated into each community; and
- Efficiency: measured by the extent to which resources are used appropriately to achieve the commitments.

Exercise

How do clients measure the success of the ES?

Service Provider Employment Service Commitments

The following diagram identifies the provincial core measure and service quality standards (SQS) which translate into the SDS Schedule B commitments.

Provincial Service Quality Standard

DIMENSION	MEASURE	MINIMUM PROVINCIAL STANDARD	WEIGHT	SQS VALUE	MAXIMUM VALUE
Customer Service (40%)	1. Customer Satisfaction (client/participant/employer)	85%	15%	1.28	1.5
	2. Service Coordination	30%	25%	0.75	2.5
Effectiveness (50%)	3. Service Impact • Employed/Career Path	69%	25%	1.73	2.5
	• Training/Education	10%	10%	0.10	1.0
	4. Participant Suitability • Participant Profile	25%	15%	0.38	1.5
Efficiency (10%)	5. Funded Intake & activity • Intake in assisted services	90%	5%	0.45	0.5
	• Workshop Activities/ Information Sessions	90%	5%	0.45	0.5
			Service Quality Standard	5.14	10.0

1. Customer Satisfaction (0.85 x 1.5) = 1.28
2. Service Coordination (0.30 x 2.5) = 0.75

3. Service Impact
   Employed/Career Path (0.69 x 2.5) = 1.73
   Training/Education (0.10 x 1.0) = 0.10
4. Participant Suitability (0.25 x 1.5) = 0.38

5. Funded Intake and Activity
   Intake in Assisted Services (0.90 x 0.5) = 0.45
   Workshops (0.90 x 0.5) = 0.45

Overall Service Quality Standard 5.14

The standard for each core measure is multiplied by its weight to obtain a value and the values are added together. In this example, the sum of values results in a minimum service quality standard of 5.14. The maximum service quality standard is 10.0 and core measures cannot achieve a value higher than the maximum value assigned to it.

Each core measure has associated data indicators that are entered into CaMS.

ES Measures and Indicators

It is critical that data entered into CaMS is valid and reliable as it is contained in performance reports which are used to evaluate SDS performance and to make business decisions to continuously improve ES. There are several resources available on the Employment Ontario Partners Gateway (EOPG) related to CaMS data entry including:

The Employment Service—Service Quality Measures and Indicators 2010–2012 document.[13] This is a very important resource to understand how data translates to performance reporting and evaluation. The document is very useful for the SDS to better understand the core measures and related indicators that are linked to SDS performance. The document includes calculations and CaMS screen shots; a thorough understanding of these can help SDS managers catch data integrity issues.

ES Service Quality Measure and Indicators 2010–2012 document is linked to performance reports and is a useful tool to help SDS managers and staff understand:

- The indicators related to each core measure;
- The definitions of each indicator;
- The calculation for each indicator; and
- The source of the indicator.

Another important resource is the Employment Service Data Dictionary[14]. This dictionary provides very detailed information related to data elements; a thorough understanding of these elements can increase data integrity as SDS will understand the data elements related to each indicator to ensure that the data entered into CaMS is valid.

The Data Dictionary has some performance information listed however, as the calculations are not part of the data dictionary, it is not a standalone document (e.g. it states that Customer Satisfaction is based on closed service plans with a 4 or 5 response but it does not indicate that this is based on all those that redounded 1–5 and does NOT include those who also did not respond e.g. response of 6, except when we are looking at response rates.)

[13] Employment Service—Service Quality Measures and Indicators 2010–2012.
http://www.tcu.gov.on.ca/eng/eopg/publications/20110622_performance_indicators_definitions.pdf
[14] Data Dictionary.
http://www.tcu.gov.on.ca/eng/eopg/publications/es_data_dictionary.pdf

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Exercise: Core Measure and Indicators

		Customer Service		Effectiveness			Efficiency	
		Customer Satisfaction	Service Coordination	Employed/ Career Path	Training/ Education	Suitability	Assisted Service Participants	RI Workshops/ Information Session Participants
Points to Ponder	Why is this core measure important?							
	What data integrity issues must be anticipated related to this core measure?							
	What strategies could the SDS implement to increase the integrity of the data?							

Employment Service Reports[15]

This information was outlined in ESPMS training for Service Delivery Managers. It is essential that SDS understand how site-level, or back-end, data collected in EOIS-CaMS comes together in reports to provide the necessary ingredients to enable better decision making.

The EOIS-CaMs system generates two types of reports:

- Performance Reports (#10 and #11[16]) which integrate core measure standards, SDSs performance commitments by site, SDS actual performance against the interim targets and financial details. The AS service data contained in these reports relates to **closed** client files. The reports are cumulative for the fiscal year. MTCU and SDS use these reports to monitor and evaluate performance; and
- Operational Reports: provide a deeper level of data related to **open** files and are cumulative for the fiscal year. This information can support SDSs to monitor, manage and continuously improve ES "below the waterline" on a regular basis.

The "Service Provider Report-Quick Reference" outlines the following report types:

Performance Reports:

- 10: ES – Service Quality
- 11: ES – Detailed Service Quality

Operational Reports:

- 15A: ES – All Data – RI
- 15B: ES – All Data – Service Plan/Profile
- 16: ES – Employers
- 18: ES – Case Activity
- 19A & B: Follow-Up Cases
- 20: Inactive Cases
- 26: Service Provider/Service Delivery Site List
- 27 & 29: ES – Service Provider and Service Delivery Site Mailing Labels

[15] Service Provider Reports—Quick Reference/Desk Aid.
http://www.tcu.gov.on.ca/eng/eopg/publications/eois_cams_reports_ref.pdf
[16] EOIS Case Management System Service Provider User Guide: Reporting Reports #10 and #11.
http://www.tcu.gov.on.ca/eng/eopg/eotransformation/cams_reporting/eois-cams_reporting_es_quality_service.pdf

SDS sites have indicated that they frequently use reports 11, 15B and 18 "below the waterline" to manage the delivery, to evaluate the performance and to continuously improve ES Assisted Services. The following information regarding these specific reports can be found in the EOIS CaMS Service Provider User Guides: Reporting.

Employment Service—Detailed Service Quality Report 11[17]

The Detailed Service Quality (DSQ) Report shows all of the indicators that are attributed to each performance measure, including numerator and denominator columns representing the actual number of participants used to calculate the percentage.

The actual results under the YTD All Participants area are used to compare against the performance commitments from the Schedule B.

Performance report data is cumulative starting from the beginning of the fiscal year. Actual results are summarized for each SDS from the beginning of the fiscal year, to the end of the month listed in the report header.

The report has four main reporting areas:

- YTD All Participants
- YTD Job Search
- YTD Job Placement
- YTD Job Retention

Each closed Service Plan is reported in one or more of the columns, depending on which Sub-Goals with completed Plan Items were created for it. Therefore the numbers for these three areas will not match the YTD All Participant figures.

Data Sources

The information in the report is drawn from closed service plans and the RI data entered by the SDS on a monthly basis. The closure date uses the system date when the Service Plan is closed and is not an input or editable date.

[17] Service Provider User Guide: Reporting: ES Detailed Service Quality #11
http://www.tcu.gov.on.ca/eng/eopg/eotransformation/cams_reporting/eois-cams_reporting_es_quality_service.pdf

Assisted Service Participants are those who have received at least one of the following services: Job Search, Job Matching and Placement, and or Job Training/Retention services. For these Sub-Goals, at least one plan item must be completed for the data to appear on this report, and for the Job Matching Placement and Incentives Sub-Goal, the Plan Item must be either Placement with Incentives or Placement without Incentive/

Close Service Plans that have a closure reason of "opened in error" are excluded from this report.

Employment Service—All Data—Service Plan/Profile Report 15B

Description

This report summarizes the ES participant profile, referrals and financial (flow-through) data based on service plan start date for each SDS. The following aggregate information is shown per SDS:

- Service Coordination data;
- Referred In and Referred Out sub-indicators includes non-performance break downs by Service Coordination category;
- Expenditures for Employment and Training Supports and Incentives for the SDS;
- Participant Profile—includes non-performance breakdowns; and
- Last Employment Occupation NOC.

Data Filtering

The report includes participants that have a referral to ministry delivered programs. This means that applicable data for non-assisted service participants will appear on the report.

Participants are filtered into the report based on their Service Plan being in an open, approved or active state, or being closed in the fiscal year. Service Plans that are closed with a closure reason of "opened in error" are excluded from this report.

Employment Service—Case Activity Report 18[18]

Description

This report shows ES case activity grouped by case owner. The following information is shown per service plan:

- Participant profile information
- ES activities
- Expenditures
- Program dates

There is a summary per case owner by status shown at the top to report.

There is a breakdown of case activity by status at the bottom of the report, totaling:

- The number of job search participants
- Job retention participants
- Number of placements
- Number of referrals
- Training support expenditures
- Apprenticeship scholarship expenditures
- Hiring incentive committed
- Hiring incentive expended
- Apprenticeship employer signing bonus, and
- Total expenditures.

The report will have to one line per service plan.

[18] Service Provider User Guide: Reporting – ES – Case Activity Report 18
http://www.tcu.gov.on.ca/eng/eopg/eotransformation/cams_reporting/eois-cams_reporting_es_case_activity.pdf

Data Filtering

Only participants who have a service plan with the Job Search, Job Retention, or Job Matching Placement and Incentives Sub-Goal will show on this report.

The report includes participants that have a referral to ministry delivery programs. This means that applicable data for non-assisted service participants will appear on the report.

Participants are filtered into the report based on their Service Plan being in an open, approved or active state, or being closed in the fiscal year. Service Plans that are closed with a closure reason of "opened in error" are excluded from this report.

Employment Service Reports Exercise

In which reports, 11, 15B and/or 18, would you find the following?	11	15B	18
1. Information related to closed ES files			
2. Information related to open ES files			
3. The case owner for each ES case activity			
4. Client suitability indicators			
5. A breakdown of the case activity by status			
6. Detailed "open file" information related to core measures and indicators			
7. Committed and expended hiring incentives			

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Service Provider Reports - Quick Reference

This quick reference document provides at a glance detail on the various types of reports, report names, descriptions, run times, report access and the projected report deployment schedule. Further details are available in Chapter 10 of the EOIS-CaMS Service Provider User Guide.

Report Type	Report and Description	Format	Available	Retention	Comments
Performance Measures	10. Employment Service - Service Quality Service Delivery Site Schedule B performance commitments, allocations, and actual results for participants who have completed the Employment Service.	PDF by Service Delivery Site	November 2010 Updated May 2011 Monthly - Replaced Daily from the 1st to 5th Final report run after the 5th business day	Final report retained for 37 months	Region, and province also retained 37 months
Performance Measures	11. Employment Service - Service Quality (Detailed) In addition to the report above, this report includes the numeric values that percentage results are based on as well as the individual indicators contributing to each performance measure.	PDF by Service Delivery Site	November 2010 Updated May 2011 Monthly -Replaced Daily from the 1st to 5th Final report run after the 5th business day	Final report retained for 37 months	Region, and province also retained 37 months
Operational	15A. Employment Service – All data - RI Summarizes all data captured for ES monthly R&I aggregate data.	PDF by Service Delivery Site	February 2011 Rollups May 2011 Monthly - Replaced Daily from the 1st to 5th Final report run after the 5th business day	37 months	Region, and province also retained 37 months
Operational	15B. Employment Service – All data – Service Plan/Profile Summarizes ES participant profile, referrals and financial data based on service plan start date.	PDF by Service Delivery Site	July 2011 Monthly - Replaced Daily from the 1st to 5th Final report run after the 5th business day	37 months	Retained 37 months
Operational	16. Employment Service - Employers Client level ES employer profile and related placement & expenditure data grouped by employer.	Excel one row per placement Should be printed within Excel	August 2010 Weekly (available Monday morning based on previous weeks data)	56 weeks	

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Report Type	Report and Description	Format	Available	Retention	Comments
Operational	18. Employment Service - Case Activity Client level ES case participant activity, expenditures, outcomes and satisfaction and client profile such as age, education and gender.	Excel one row per participant Should be printed within Excel	August 2010 Updated May 2011 Weekly (available Monday morning based on previous weeks data)	56 weeks	Available only to Managers
Operational	19A & 19B. Follow-up Cases Shows when ES case participants' 3, 6 and 12 month follow-ups are due based on exit date and the percentage that have been completed.	Excel one row per participant Should be printed within Excel	February 2011 Updated May 2011 Weekly (available Monday morning based on previous weeks data)	56 weeks	Available only to Managers
Operational	20. Inactive Cases Active cases that haven't had any activities recorded within the last 60 days of the last planned activity end date.	Excel one row per participant Should be printed within Excel	TBD Weekly (available Monday morning based on previous weeks data)	56 weeks	
Operational	26. Service Provider/Service Delivery Site List Contact information for service providers and service delivery sites across the province including the associated ministry ETC contact and program.	Excel one row per SP/SDS Should be printed within Excel	August 2010 Updated May 2011 Replaced Daily	None	Province
Operational	29. Employment Service – Service Provider Mailing Labels Labels for service providers across the province	Word – printable sheet format	August 2010 Replaced Daily	None	Province
Operational	27. Employment Service – Service Delivery Site Mailing Labels Labels for service delivery sites across the province	Word – printable sheet format	August 2010 Replaced Daily	None	Province

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Report Type	Report and Description	Format	Available	Retention	Comments
Operational	50. Summer Jobs Service – All data - RI Summarizes SJS monthly RI Information Session data.	PDF by Service Delivery Site	May 2011 Replaced Daily from the 1st to 5th Final report run after the 5th business day	37 months	Sub region, region, and province also retained 37 months
Operational	51. Summer Jobs Service - Case Activity Client level SJS case participant activity, expenditures, outcomes and satisfaction and client profile.	Excel one row per participant Should be printed within Excel	May 2011 Weekly (available Monday morning based on previous weeks data)	56 weeks	Available only to Managers
Operational	52. Summer Jobs Service - Employers Client level SJS employer profile and related placement & expenditure data grouped by employer.	Excel one row per placement Should be printed within Excel	May 2011 Weekly (available Monday morning based on previous weeks data)	56 weeks	

Data Files

Data files are provided as an optional resource in addition to the above reports. Seven Comma Separated Values (CSV) data files mimicking Case Management System structure will be provided for each service delivery site on a daily basis allowing service delivery sites to run their own queries for research and evaluation purposes. To utilize these data files requires some advance database knowledge and may require assistance from your IT support.

Note: For privacy purposes, the client's SIN is not included in the data files. For more details on data files refer to the EOIS-Case Management Data File Definitions Guides on the ES Service Provider Reporting Website.

New Data files are available in May 2011 representing Resource and Information and SJS related information.

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Data Files	Format	Available	Retained	Comments
32A. Employment Service – Clients (participants) FILENAME: DFCLT	CSV	August 2010 Replaced Weekly	Year end	Excludes SIN Includes all client types (SJS and ES)
33B. Employment Service – Employment History FILENAME: DFEPH	CSV	August 2010 Updated May 2011 Replaced Weekly	Year end	Includes all client types (SJS and ES)
32B. Employment Service – Education History FILENAME: DFEDH	CSV	August 2010 Replaced Weekly	Year end	Includes all client types (SJS and ES)
32C. Employment Service – Service Plans FILENAME: DFSPN	CSV	August 2010 Replaced Weekly	Year end	ES only
32D. Employment Service – Sub Goals and Plan Items FILENAME: DFSPI	CSV	August 2010 Updated May 2011 Replaced Weekly	Year end	ES only
32E. Employment Service – Follow-up Events FILENAME: DFFOL	CSV	August 2010 Replaced Weekly	Year end	
32F. Employment Service – RI Participation FILENAME: DFRIP	CSV	May 2011	Year end	ES only
32G. Employment Service – RI Customer Satisfaction FILENAME: DFRIC	CSV	May 2011	Year end	ES only
32H. Employment Service – RI Information Sessions FILENAME: DFRIS	CSV	May 2011	Year end	ES only

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Data Files	Format	Available	Retained	Comments
33A. Employment Service – Employers FILENAME: DFEMP	CSV	August 2010 Replaced Weekly	Year end	Provincial
33C. Employment Service – Codes & Descriptions FILENAME: DFCOD	CSV	August 2010 Replaced Weekly	Year end	Provincial
53C. Summer Jobs Service – Service Plans FILENAME: SJS_DFSPN	CSV	May 2011	Year end	SJS only
53D. Summer Jobs Service – Sub Goals and Plan Items FILENAME: SJS_DFSPI	CSV	May 2011	Year end	SJS only
53H. Summer Jobs Service – Information Sessions FILENAME: SJS_DFRIS	CSV	May 2011	Year end	SJS only

Exercise

What reports does your site use most frequently to monitor performance?

How are these reports utilized?

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Employment Ontario Employment Service

Reporting: Data Integrity and Data Analysis for Service Delivery Sites

Unit 4: Data Analysis

Ontario

Unit 4: Data Analysis

In this Unit Managers will:

- Recognize the importance of performing service delivery analysis and reporting in assessing the quality of service being provided to clients;
- Be able to analyze ES data; and
- Make evidence-based decisions to continuously improve ES.

As mentioned previously, there are three inter-related components of business intelligence capacity: technology, business processes and people; "people" includes the capacity of the human resources within SDS to demonstrate business intelligence.

The previous Units focused on supporting "people" to:

- Know what data to collect and why it is collected;
- Collect the data with integrity; and
- Locate data in reports.

This Unit focuses on supporting "people" to:

- Analyze data; and
- Make evidence-based decisions to continuously improve ES.

Organizational Capacity: Data Analysis

Data analysis in ES is critical to ensure MTCU and service providers make solid business decisions. As mentioned in Unit 1: Key Concepts, from an organizational capacity (OC) perspective, an SDS is required to demonstrate use of data. (i.e. the SDS has evidence that non-financial data is analyzed and evaluated to make both short and long term programmatic/service changes that reflect local labour market and community needs).

Data analysis is:

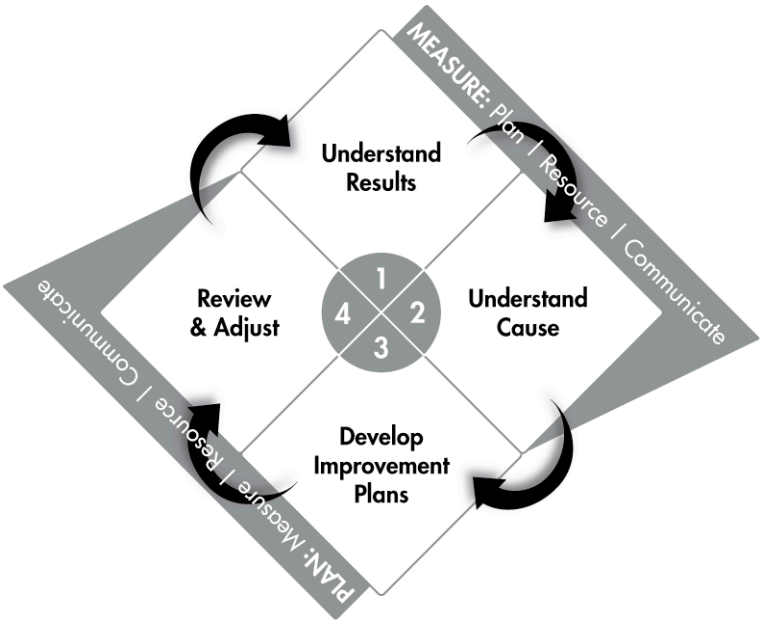
"A practice in which raw data is ordered and organized so that useful information can be extracted from it. The process of organizing and thinking about data is key to understanding what the data does and does not contain. There are a variety of ways in which people can approach data analysis, and it is notoriously easy to manipulate data during the analysis phase to push certain conclusions or agendas. For this reason, it is important to pay attention when data analysis is presented, and to think critically about the data and the conclusions which were drawn."[19]

It is helpful when analyzing data to apply "systems thinking"[20] , the practice of understanding how things influence one another within a whole. It is an approach to problem solving/critical thinking whereby business problems are seen as connected to the overall organizational system; it is the ability to see the forest and the trees—the macro and the micro.

There are many problem solving and critical thinking models available in the public domain. Many of these models include tapping into past memories, knowledge and understanding of the problem and to be aware of how our assumptions can get in the way of effective decision making.

[19] http://www.wisegeek.com/what-is-data-analysis.htm
[20] Senge P, (2006), The Fifth Discipline.

As indicated in this diagram, data analysis (as well as the dimensions of organizational capacity) is imbedded in the MTCU ES Continuous Improvement (CI) process. Understanding results and causes involves learning from experience and uncovering facts (rather than opinions) to make evidence-based decisions.



As mentioned in the 2012–2013 Business Plan, SDS must integrate this CI process into the day-to-day delivery of employment services.

Question:
Does your SDS have evidence that non-financial data is analyzed and evaluated to make both short and long term programmatic/service changes that reflect local labour market and community needs?

If so, how does your SDS demonstrate this "use of data" for continuous improvement purposes?

Exercise: Data Analysis

In order to develop improvement plans (strategies and actions) you need to compare your actual results against your commitments and against actual regional and provincial results. Understanding how you compare allows you to define your performance gaps which will lead to understanding the causes (business and management processes within your control) that, if addressed, can improve performance.

Part 1: Determine Results

Review the DSQ and calculate the variances against commitments and regional (or provincial) results.

Dimensions and Core Measures	ES Prov. Target	Perf. Com. Ann. Target	SDS YTD All Participants Actual	SQS Variance for SDS	Prov. YTD Actual	SDS Variance to Prov.
Customer Service						
Customer Satisfaction (Client/participant/employer)						
Service Coordination						
Effectiveness						
Employed/Career Path						
Training/Education						
Suitability (Participant Profile)						
Efficiency						
Intake in Assisted Services						
Intake in Workshop Activities/ Information Sessions						
Interim Service Quality Target						

Part 2: Overall Performance

- What do you "know" about this service provider's current performance (facts)?
- What are the strengths and areas for improvement? Consider results against commitments and against provincial results?
- What additional information do you "need to know" in order to make evidence-based decisions? Where would you find this information?

Part 3: Service Decisions and the ES plan

- How do service decisions link to the information contained in this report?
- Compare the suitability measures and indicators to the other core measures and ES interventions in the report. Does it appear that appropriate service decisions were made?
- What evidence supports your opinion? What other information do you require to turn this opinion into fact?
- How does this analysis inform the [programs and services offered by your SDS to your clients?

Below the Waterline Opportunity

You can uncover gaps in ES delivery by viewing your performance measures through an organizational capacity lens. Engage your team to complete the table below to deepen everyone's understanding regarding how your SDS might demonstrate organizational capacity from an ES service delivery perspective.

How might these dimensions of Organizational Capacity…		…impact these performance measures?						
		Customer Service		**Effectiveness**			**Efficiency**	
		Customer Satisfaction	Service Coordination	Employed/ Career Path	Training/ Education	Suitability	Assisted Service Participants	RI Workshops/ Information Session Participants
	Measure							
	Plan							
	Resource							
	Communicate							

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Reporting: Data Integrity and Data Analysis for Service Delivery Sites

Summary

Summary

This training was intended to support SDS to build capacity related to business intelligence, more specifically, improving the quality of data entered into Employment Ontario Information System-CaMS (EOIS-CaMS) and improving data analysis so MTCU and service providers have verifiable data to make solid business decisions.

Hopefully the information provided will support SDS to achieve MTCU's expectations for 2012–2013, and beyond, to:

- Achieve contracted commitments;
- Integrate continuous improvement into the fabric of the organization; and
- Collect valid and reliable site-level data to support solid business decisions.

The overall desire is for MTCU and SDS to build sustainable, effective, efficient employment services across Ontario with the ultimate goal of "sustainable employment" for Ontario citizens.

The training focused on:

- The importance of data integrity and the need to ensure the raw data collected in EOIS-CaMS is valid and reliable to aid in the evaluation of SDS performance and to make appropriate business decisions at the SDS, regional and provincial levels;
- The definition of Business intelligence (BI), what it entails and the SDS BI roles and responsibilities;
- The importance of performing SDS data analysis for the purpose of continuous improvement; and
- The resources available to support data integrity and data analysis (DSQ and other reports, data dictionary, indicators and measures document and other resources on EOPG re: EOIS-CaMS).

Exercise

Now that you know what you know, on a scale of 1–5 (1 low confidence – 5 high confidence), how confident are you that, at this point and time, the data entered into CaMS is valid (accurate) and reliable (consistent results over time) at your SDS?

What issues to be to be addressed at your SDS to increase your confidence?

- Technology (e.g. hardware and software)
- Processes
- People

Exercise: Organizational Capacity

As the "business owner of data" it is hoped that you will share this course material, and your learning from this training experience, at your SDS. This guide contains several exercises that you may use to engage team members to increase the quality of the data entered into CaMS and the integration of continuous improvement into the fabric of your SDS.

As discussed, the success of delivering and sustaining effective, efficient, customer oriented ES rests on a solid business foundation, or organizational capacity (OC). Complete this table to determine if your SDS can consistently demonstrate, through evidence, that it has OC as it relates to BI. If not, what actions will your SDS implement to address the gaps?

Focus Area: Business Intelligence

Measure Definition	Indicator And Definition: The SDS Is Able To Demonstrate	Yes, We Have OC In This Area And Can Prove It (Describe)	Yes, We Have OC In This Area, But Can't Prove It (Describe)	No, We Don't Have OC In This Area	Proposed Next Steps And Timelines
Measure (Technology, Processes, People)	Results Management: The SDS has systems and processes in place to track performance against agreements and commitments and standards.				
Plan (Technology, Processes, People)	Demonstrated Use of Data: The SDS has evidence that non-financial data is analyzed and evaluated to make both short and long term programmatic/service changes that reflect local labour market and community needs.				
Resource (Technology, Processes, People)	Administrative Processes: The SDS has administrative systems in place (Admin, finance, HR, IT) that support the organization's business commitments to customer service, quality and operational performance.				
Communicate (Technology, processes , people)	Governance: The service provider has evidence of governance structure which has process/policies in place to ensure accountability to funders, clients, community and its own staff.				

Next Steps

Now that you have been trained, it is expected that you will take this information back to your SDS and train others responsible for the integrity and the analysis of your EOIS-CaMS data. This guide, along with the power point presentation, provides all of the information, tools and resources you require to do group or one-on-one training. The training may be delivered formally or informally—you may choose to use all or just parts of the training package. To help you to "hit the ground running" you may want to engage your team in the following activities.

Activity	Participants	Date
Develop policies and procedures related to quality assurance and business intelligence		
Compare the client service pathway in this manual to the SDS pathway to determine gaps, if applicable		
Complete the "below the waterline" activity re: service delivery decision model points to ponder		
Complete the client suitability and the employment service plan exercise		
Complete the "below the waterline" exercise re: ES Service Provider Guidelines		
Complete the data integrity exercise re: core measures and indicators		
Complete the data analysis three part exercise		
Complete the worksheet on to determine the current state of OC BI at your SDS		

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Training Evaluation

Ontario

Training Evaluation

Training Location _____

1. Select the one choice that most describes your "current state" pertaining to Session learning objective:
   - Don't Know: you are not aware of the concept
   - Know: you are aware of the concept
   - Explain: you could explain the concept to others
   - Apply: you know enough about the concept to implement it at your Service Delivery Site

Key Concepts	Don't Know	Know	Explain	Apply
Introduction				
• Data integrity; "business intelligence" (BI) and SDS BI roles and responsibilities				
• Data used to evaluate SDS performance and make business decisions				
• Importance of performing service delivery analysis				
• Resources for data integrity and data analysis				
Unit 1: The Concepts				
• ES customers are at the centre of the system				
• Components of the PMS: Performance Measurement Framework;				
• Continuous Improvement and Business Intelligence				
• Dimensions of the Performance Measurement Framework (PMF)				
Unit 2: ES and ES Plan				
• Core measures used to calculate the SQS				
• Indicators used to calculate each core measure				
• Relationship between the dimensions, measures and indicators and the connection to CaMS				
• Responsibilities of the "business owners of data"				

Key Concepts	Don't Know	Know	Explain	Apply
Unit 3: Data Integrity				
• Importance of data integrity in Performance Management	☐	☐	☐	☐
• Types of reports and their usage	☐	☐	☐	☐
Unit 4: Data Analysis				
• Service delivery analysis and reporting in assessing the quality of service	☐	☐	☐	☐
• Analyze ES data	☐	☐	☐	☐
• Evidence-based decisions to ensure continuous improvement	☐	☐	☐	☐

2. Please rate the following statements using the scale 1 through 5 where:
   1 = Strongly Disagree and **5 = Strongly Agree**.

	1	2	3	4	5
The **difficulty level** of the training was about right.	☐	☐	☐	☐	☐
I can **apply the information** at my Service Delivery Site.	☐	☐	☐	☐	☐
The presentation met my **needs**.	☐	☐	☐	☐	☐
The trainer **actively involved** me in the learning process.	☐	☐	☐	☐	☐
As a result of this training, I am **more confident** in the areas of data integrity and data analysis	☐	☐	☐	☐	☐
This information **will assist us our site(s) to manage** Employment Services "below the waterline".	☐	☐	☐	☐	☐

Training Location _____

3. What were the overall **strengths** of the session?

4. What were the overall **challenges** of the session?

5. How could we **improve** the session?

6. Other comments and suggestions?