

# **2019-20 Operating and Reporting Requirements**

## **EMPLOYMENT ONTARIO**

### **LOCAL BOARDS**

#### **Ministry of Training, Colleges and Universities**

**2019**

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## SECTION 1 INTRODUCTION

### Local Planning

Why Local Planning?

- Local planning uses reliable and valid evidence to foster a common understanding of local issues and helps build stronger relationships between levels of government, partners and community stakeholders.
- Local planning provides opportunities to enhance service coordination, to break down barriers and to support the service network in delivering more streamlined and accessible services to clients.
- Local planning provides communities with the ability to identify, understand and develop sustainable strategies to address labour market issues within a geographical area.

### Local Board Priorities

The priority for Local Boards is to continue developing and improving resources at the local level to support the Ministry's strategic direction for local planning as follows:

- 1) Ensuring access to accurate, timely and relevant local labour market information for evidence-based analysis and community planning.
- 2) Engage employers to help identify skill gaps, employment opportunities, training needs and other "demand side" labour market issues and highlight Employment Ontario (EO) programs that can help address "demand side" needs, for example the Canada-Ontario Job Grant or Apprenticeship.
- 3) Using EO program data and other "supply" side information as evidence, support greater insight into barriers to employment and stronger linkages among local employment services through partnership activities that focus on local workforce development needs.

### Local Board Objectives

The objectives of each Local Board are to:

- a) Provide the community with high quality local labour market information for planning, by:
  - Collecting, analyzing and disseminating reliable local labour market information to local stakeholders and employers.
  - Gathering local intelligence and identifying priority issues through consultations with community stakeholders.
  - Preparing a local labour market report that identifies key issues and proposes consensus-based strategies to address them.
- b) Develop partnership projects that address labour market issues such as local skills misalignments, workforce development challenges and gaps in service by:
  - Building on existing relationships and, where possible, developing new relationships with providers of employment, training, human, social and other related programs and services.
  - Reaching out to different levels of government (e.g. municipalities, federal

- agencies) and other Ontario government ministries.
- Collaborating with local post-secondary institutions, employers, business associations, industry and unions and labour organizations.
  - Raising awareness and promoting use of available labour market programs and services through engagement with stakeholders, particularly employers.
- c) Facilitate service coordination and planning by:
- Collecting and interpreting local labour market and EO program information to assist service providers and local system managers in their decision making and planning.
  - Linking employers, service providers, other ministries/levels of government and broader support agencies to promote a comprehensive and seamless system of client services.
  - Identifying service delivery gaps, overlaps, duplications and potential areas for further collaboration and coordination across employment, training and other related programs and services

## SECTION 2 LOCAL BOARD DELIVERABLES

### The Local Labour Market Planning (LLMP) Update

The 2018-19 Local Board LLMP was an updated report that incorporated National Household Survey (NHS) data relevant to the local labour market and economic conditions. The 2019-20 LLMP will be an update on last year's report and the beginning of a new cycle that will culminate in another comprehensive report. The 2019-20 LLMP should include the following steps:

#### **a) Gathering evidence, analyzing and interpreting local labour market indicators and other data.**

Local Boards should update the eight core indicators, tracking the most recent demographic, Canadian Business Patterns (CBP) and migration data, as well as other relevant local intelligence.

- **Based on the evidence, the report should provide a narrative** of the key changes in local workforce characteristics including, but not limited to, population, employment, unemployment, participation rates, migration and immigration, educational attainment, etc.
- **Discuss economic changes** and their impact in relation to the number of local employers, number of employers (by employee size range) and distribution of local businesses by industry changes in local employment and key industry sector.
- **Present an analysis** of the EO datasets, using them to validate the local workforce characteristics and client outcomes in the local area. The datasets may also help to identify potential gaps in service or provide insight to better engage underrepresented groups.

#### **b) Facilitating a consultation process**

The report should describe the local consultation strategy and summarize the findings of consultations held with community stakeholders and employers. The consultations should reflect key issues and questions determined by the evidence.

#### **c) Updating last year's Action Plan**

The report should provide a status update on the previous year's Action Plan. If relevant, describe important emerging local issues and include actions that community is committed to undertake. Evidence should be used to identify new issues and/or expand on current issues, indicating why they are important, related to both the supply and demand sides of the labour market. The report update should tell the local story about local supply and demand, skills shortages, industry and occupational profiles, economic and labour market changes and should focus on challenges and opportunities linked to economic development, workforce adjustment, employment and training.

## LLMP Reporting Requirements

- The 2019-20 LLMP Report must be submitted electronically to the Ministry **no later than February 29, 2020**.
- The LLMP report may be released to the community in hard copy or electronic version or both.
- The LLMP Report must be available in both French and English.
- The LLMP Report will be compliant with the *Accessibility for Ontarians with Disabilities Act (AODA)*.

## Quality of the LLMP Report

The quality of the LLMP Report will be evaluated based on the following questions:

- Was the analysis of the data elements rigorous and reliable and were the issues identified in the report relevant to current conditions?
- Was the report written clearly and in plain language, without sacrificing quality?
- Was the process of involving stakeholders in a community action planning exercise effective and inclusive, particularly with respect to the involvement of employers?
- Was the service provider network actively engaged in discussing and responding to service issues arising out of analysis of the EO program data report?
- Did the Local Board make effective use of the core indicators to track and report changes in employment in the local labour market?

## EO Program Data Report

As in previous years, the Ministry will provide Local Boards with aggregated EO program/client data reports for the local area with comparable data for the region and the province.

The EO information should be used to facilitate service planning discussions with local service delivery networks, other services and programs, levels of government, and other community agencies.

The EO information will provide evidence for identifying service delivery gaps, overlaps, duplications and potential areas for further collaboration and coordination across employment, training and other related programs and services

Additional instructional information will be provided at the time of the release of the 2019-20 EO Program Data Report. The EO reports and related consultations should be included in the LLMP report and incorporated into the analysis and action plan.

## Employer Engagement

Employer consultations are an important part of the 2019-20 LLMP report. Local Boards should continue to develop employer linkages to support more in depth understanding of local employment opportunities, skills needs and gaps, training priorities and other demand side information.

Local Boards may use a variety of locally-appropriate methods to reach out to employers. These may include, but are not limited to:

- Assessing employers' labour and skill needs through surveys. The survey results

should be included as an input into the analysis of local workforce and skills needs reported in the LLMP.

- Probing further into key labour market issues, informed by the data, through one-on-one interviews or meetings with employers in local industries where the trends show employment growth and/or decline in various occupations.
- Approaching local industry sector groups or business associations to organize focus groups or meetings with employer representatives to garner information on local employment and training challenges.

### **Status of Previous Actions**

The LLMP should include a brief status report on previous action plans and indicate whether they will be removed from the plan going forward or included in the new Action Plan as one of the short, medium- or long-term actions and why.

### **LLMP Translation**

The LLMP report must be translated into French, and both English and French versions submitted to the Ministry no later than February 29, 2020.



## SECTION 3 LOCAL BOARD DELIVERABLES: PARTNERSHIP PROJECTS

### Local Board Partnership Projects

Proposals for Local Board annual partnership activities were submitted as part of the 2019-20 Business Planning process and approved for the 2019-20 fiscal year.

Please note: Any approved multi-year initiatives must have measurable outcomes at the end of each fiscal year.

### In-year Changes to the Partnership Plan

Local Boards are permitted to make minor changes to approved partnership activities so long as the Ministry is notified of the changes.

If, during the year, there are significant changes to the partnerships originally proposed as part of the Business Plan, Local Boards must amend the original partnership plan, explain why the changes are necessary, and submit in writing for Ministry approval.

### Partnership Progress Reports

Local Boards are responsible for reporting twice a year on the status of 2019-20 partnership activities.

- A mid-year Partnership Progress Report is due Friday, **October 30, 2019**
- A year-end Partnership Progress Report is due Friday, **March 28, 2020**

The reporting template for the mid-year and year end Partnership Progress Reports are available on the Employment Ontario Partners` Gateway (EOPG).

The Ministry will monitor the Partnership Progress Reports for timely submission and completeness.

### Employer One Survey

Many Local Boards will be delivering the Employer One Survey as one of their partnership projects in 2019-20. The Employer One Survey is intended to enhance employer engagement strategies at the local level and to obtain a better understanding of local employer needs and issues.

### Purpose

The Employer One survey is a comprehensive survey of local employers to gain an understanding of the demand-side in the local area's labour market. It is designed to collect information annually from local employers on a range of HR issues, such as labour turnover, hard to fill positions, recruitment difficulties, current and future skills shortages, as well as issues in training and education practices.

Since employer engagement and service coordination are not mutually exclusive, this initiative reinforces the dual customer perspective by focusing on clients and employers to provide a more comprehensive picture of the supply and demand dynamic in the local labour market. The results of the Employer One Survey are

intended to provide a better understanding of employer occupational and skills requirements to inform job search and employment decision making. Additionally, the results of the survey can inform professional development and training courses that directly relate to the local labour market demand as identified by employers.

## Stakeholders

### Community Partners

Community Partners can provide access to a number of different employers to extend the reach of the completion of the survey. Additionally, the results and roll-up of the Employer One Survey will be beneficial to community partners, such as EO Service Providers and educators, by increasing understanding of hiring practices and training needs. The Employer One Survey may be able to serve the information needs of local service providers, job developers, economic developers, educational institutions and other local organizations interested in obtaining demand- side information.

The intent of the Employer One Survey is to have a coordinated community approach to employer engagement and demand-side information gathering. This presents an opportunity for community partners to coordinate outreach to employers and reduce the need for multiple organizations to approach employers with similar surveys or one-off information requests.

### Employers and Employer Organizations

Involvement of the employer community is the most important factor in the success of this project. Local employers stand to benefit from completing the Employer One Survey by obtaining HR related information and by being involved in the potential actions to address skills gaps and HR related information through being involved in potential actions to address skills gaps and other identified HR issues. The completion of the survey provides the employer community with a voice to communicate the current occupational, training and skills needs in their business.

The results of the Employer One Survey may provide employers with evidence-based decisions making on skills enhancement for their workforce or can support their pursuit of funding for training and employee upgrading.

## Reporting requirements

Local Boards undertaking the Employer One Survey must:

- Submit a summary report of the survey results electronically to the Ministry by **March 27, 2020**.
- Post the survey results on the Local Board website.
- Provide the results in both English and French.

## Local Boards Online Partnership Database

The Local Boards Online Partnership Database is a publicly accessible online database of Local Board partnership records listing summary information for each project such as project description, outcomes, key organizational partners and financial contributions.

Local Boards are responsible for creating and updating partnership records in the Local Board Online Partnership Database for projects approved under the Ontario Transfer

Payment Agreement (OTPA) and any additional projects undertaken by the Board.

Boards are to clearly indicate which partnerships are approved under the OTPA.

The Ministry will monitor the [Workforce Planning Ontario website](#) for required updates to the partnership database.

The partnerships must be individually recorded and updated in the Online Partnerships Database using the following fields:

- Project type (select the project type for each partnership).
- Start and end year.
- Project title.
- Project description - indicating how this activity relates to the local labour market planning priorities and issues.
- Project outcome.
- Key partners/stakeholders.
- Products - indicate the product, if any, that will result from this partnership i.e., reports, studies, etc. and include a hyperlink to the product.
- Fiscal data - information on planned financial and/or in-kind contributions from partners using the fields of data available in the database.

Local Boards are responsible for reviewing and activating their own partnership records online. Local Boards are also responsible for having partnership records for approved partnerships translated into French. The Ministry will monitor online partnership records for completion, accuracy and translation.

The partnership records will provide the Local Boards with the required information to complete CIPMS indicators 4 – 6 for the 2019-20 CIPMS report.

### **Special Project Fund (If applicable)**

**Special Project Fund (SPF)** activities are specific to the Local Board program and are generally initiated by the Ministry with no contribution from other partners. SPF activities are provincial in scope and contribute to building capacity of the Local Board network. SPF projects are coordinated by a Local Board on behalf of the entire network. If a Local Board was approved to coordinate a SPF initiative, the Partnership Progress Report and CIPMS Report will be completed and submitted to the Ministry. These progress reports are to be submitted on the same dates as regular partnership progress reports – October 30, 2019 and March 28, 2020 respectively.

## **SECTION 4 LOCAL BOARD DELIVERABLES: IN-DEMAND SKILLED TRADES PROJECT**

### **In-Demand Skilled Trades Project Description**

The Recipient will complete and submit a research project to identify whether and which jobs in the skilled trades are in demand in the geographical area served by the local network. For this project, “in-demand” is defined in a relative manner and could include jobs with high employment opportunities/openings and strong earnings potential, offering work in a key industry in the local area or many industries, or has been identified by employers in the local area.

The skilled trades are defined as trades that are prescribed in regulation under the Ontario College of Trades and Apprenticeship Act, 2009. There are 156 trades in Ontario. They are divided across four sectors (i.e., construction, industrial, motive power, and service), and they are either compulsory or voluntary.

1. This project will include:

- Identifying which jobs in the skilled trades, if any, are in demand in the geographical area served by the local network and producing a list of in-demand trades based on quantitative and qualitative analysis;
- Comparing jobs in-demand in the skilled trades in the local area with provincial-level employment outlook for apprenticeable occupations that are published on the Job profiles on Ontario.ca.
- Examining whether employers are experiencing issues in recruiting, training and retaining apprentices, including by trade type, size of employer and sector;
- Identifying issues affecting employers’ recruitment and/or retention of workers and apprentices for skilled trades that are reported as in demand;
- Examining employers’ experience in training apprentices;
- Examining whether employers anticipate an increased demand for skilled tradespeople in geographic area, including by trade type;
- Identifying potential misalignment between trades that are in-demand and supply conditions in the geographical area served by the local network; and
- Examining how local employers are addressing demand for workers in the skilled trades.

2. The Project may use a combination of, but not limited, to the following sources:

- Job postings data;

- Survey of local employers that include questions on vacancies (e.g. EmployerOne Survey);
- Community Labour Market Plan Report findings;
- Sector and/or occupational outlook reports;
- Ontario labour market website Job profiles;
- Statistics Canada data such as the Census and Labour Force Survey; and
- Focus group and other qualitative engagement with community stakeholders.

## **Project Deliverables**

1. A Project Engagement Plan to the Ministry by July 26, 2019, outlining a plan for completing the In-Demand Skilled Trades Project.
  - The Ministry will review plans and provide direct feedback by August 16, 2019.
2. An online Engagement Results Report document, along with Engagement Notes, to the Ministry by January 15, 2020. This report will include: recruitment practices and challenges faced by local employers, training challenges, and employers' recommendations for improving apprenticeship.
  - This information may also be posted on various websites to provide those considering apprenticeship training with information on promising opportunities in the local area.
  - This information will complement broader apprenticeship modernization efforts by providing community-focused perspectives on labour market conditions for the skilled trades. It will help government, industry, local communities and postsecondary education institutions understand how to better support the design and implementation of Ontario's apprenticeship system.

## **SECTION 5 PERFORMANCE MEASUREMENT AND REPORTING REQUIREMENTS**

### **Local Boards Continuous Improvement and Performance Measurement System**

Local Board performance indicators were designed to support performance measurement and reporting for organizations that do not provide direct client services. Based on a combination of quantitative and qualitative metrics, the framework for assessing Local Board performance is entitled the Local Board Continuous Improvement and Performance Measurement System (CIPMS).

The Local Board Continuous Improvement and Performance Measurement System (CIPMS) Report is due to the Ministry no later than March 27, 2020.

The CIPMS reporting template can be found on the EOPG.

**The Local Board Continuous Improvement and Performance Measurement System (CIPMS) Report is due to the Ministry no later than March 28, 2020. The CIPMS reporting template can be found on the EOPG.**

### **Performance Measurement**

The Local Board Continuous Improvement and Performance Measurement System (CIPMS) reflects the Boards' commitment to evaluate the outcomes of their planning and partnership activities.

The Local Board performance management framework is based on an understanding of the results achieved the underlying reasons for these results and the development of strategies for reviewing and adjusting activities on an ongoing basis. CIPMS is a set of measures that provide the Boards with a multi-faceted picture of progress toward goals.

### **CIPMS Performance Indicators**

The 2019-20 CIPMS measures Local Board performance using **seven** performance indicators. The Local Board will be required to report on all of these indicators using the CIPMS Feedback Summary Sheet. The Local Board must provide continuous improvement plans for all of the performance indicators.

The seven performance indicators are as follows:

#### **Indicator 1: Evaluating the Local Labour Market Planning Document Survey Questions**

All questionnaires must include the following CIPMS measurement questions in language that is appropriate for the target audience:

1. The Report is easy to understand.
2. In my opinion, the report provides a good summary of the local labour market needs.
3. The Report is a valuable tool to my organization for workforce planning or other purposes.
4. I would recommend the Report as a useful resource to

others.

### **Indicator 2: Quality and Value of the LLMP Consultation Process**

For the LLMP Report to have credibility, the consultation process should be assessed as an effective and inclusive process. The quality and value of the LLMP consultation process will be evaluated by measuring the satisfaction level of participants in the LLMP consultation process.

#### Survey Questions

1. I was given information in preparation for the discussion.
2. This was a good process for prioritizing issues.
3. This was a good process for identifying strategies or actions to address the issues.
4. I was able to make a meaningful contribution to the discussion about local labour market challenges.
5. I would participate in this activity again.

### **Indicator 3: Participant Satisfaction with Partnership Outcomes**

Measuring the satisfaction level of participants in ministry-approved partnership activities enables the Board to evaluate and determine whether the community recognizes the partnership projects as valuable interventions.

To the extent possible, a CIPMS survey should be administered to partners or participants at an event or soon after each activity is completed. If the survey is to measure a written document, a survey should be sent out with the product.

#### Survey Questions

All questionnaires must include the following CIPMS measurement questions in language that is appropriate for the target audience:

1. Overall, I was satisfied with the activity/report.
2. I would recommend this activity/report to others.

### **Indicator 4: Partner Satisfaction with Partnership Outcomes**

Key partner satisfaction with activities measures how well the Board responds to its partners and how valuable its services are to the local community.

The measurement of the satisfaction level of key partners with partnership outcomes will be done using a survey to be administered at the event or immediately after each activity is completed.

#### Survey Questions

All questionnaires must include the following CIPMS measurement questions in language that is appropriate for the target audience:

1. The organization showed strong leadership throughout this partnership

project.

2. The Local Board was successful in engaging a relevant mix of community partners in this partnership.
3. As a key partner in the project, my organization is satisfied with the partnership outcomes.
4. Our organization will partner again with the Local Board.

### **Reporting Requirements**

Local Boards will input the details of indicators 4, 5, and 6 into the Online Partnership Database as well as report it on the CIPMS Feedback Summary Sheet.

### **Indicator 5: Capacity to Leverage Additional Resources through Community Partnerships**

The organization's capacity to secure financial and/or in-kind support from community partners shows how effectively the Local Board is networked in the community and how relevant it is to community priorities, as viewed by key partners.

### **Indicator 6: Involvement in Partnerships beyond the Minimum Identified in the OTPA**

Additional partnership projects are an indicator of the Board's capacity to address local labour market issues and to foster community engagement in the solutions.

### **Indicator 7: Media Placements**

Media placements are communications through radio, television, print media, etc., that are not paid advertisements, which mention the Local Board or Local Board activities, actions or events. Social Media, such as Facebook pages or Twitter, are not to be counted as a media references in the CIPMS. Boards may report the number social media followers or interactions in the additional comments section of the CIPMS Feedback Summary Sheet.

#### **Reporting Requirement**

Indicator 7, media placements, will be tracked and recorded on the CIPMS Feedback Summary Sheet.

### **CIPMS Customer Satisfaction Surveys**

Indicators 1 – 4, will be measured using stakeholder surveys. For all surveys, please note that at a minimum, the surveys must:

- Allow respondents to rate the questions on a scale of 1 to 5 (*1 being not satisfied and 5 – very satisfied*);
- Include the mandatory questions as outlined in these guidelines.

In administering CIPMS surveys, the Board has the flexibility to:

- Adopt its own survey format;
- Include any number of additional questions;
- Determine the optimum timeline for distribution of the survey;
- Tailor the mandatory questions to fit specific audiences.



**NOTE:** Although there is considerable flexibility in how to develop the survey, the objective of the questions should remain the same.

## Benchmarking

For all surveys, the Local Board will:

1. Calculate an **overall end-user satisfaction score**; and
2. Outline a **continuous improvement plan**.

The **end-user satisfaction score** is calculated by dividing the number of respondents, who gave a score of **4 or 5**, by the total number of respondents.

A **70% end-user satisfaction score** is proposed as a benchmark for 2019-20. This target will be reviewed by the Ministry at appropriate intervals.

**NOTE:** All support documentation such as completed survey questionnaires (including those generated through web-based tools, telephone surveys, etc.) must be kept on file by the Board. The Ministry may, at its discretion, request this documentation to verify the accuracy and reliability of performance scores. MTCU reserves the right to survey users of the Local Board products.

## Continuous Improvement Plan

A continuous improvement plan is mandatory for all indicators. Continuous improvement gives the Local Board an opportunity to reflect on the implementation of an activity and identify success factors or short comings of the goal.

## CIPMS Reporting Requirements

Boards will collect and report survey information for Indicators 1 to 4 using the questions provided in the indicator descriptions above. Indicators 5, 6 and 7 will be sourced from the Online Partnership Database and also reported on the CIPMS Sheet.

The 2019-20 CIPMS report must be submitted to the Ministry no later than **March 28, 2020**.

## SECTION 6 FINANCIAL REQUIREMENTS

### Types of Funding

In order to provide a full range of community and employer engagement and planning strategies, Local Boards have different types of funding available:

- **Operating Funds**
  - Local Boards were required to submit a budget with their annual business plans. Operating Funds are the sum of the Local Board's capital, human resources, administration and other direct operating expenditures.
- **Special Project Funds**
  - If applicable, Special Project Funds may be available to support approved projects that benefit the entire Local Board network.
- **Field Support Funds**
  - Field Support, also known as in-year funding, are one-time funds provided through a formal in-year request, to support Local Boards with unforeseen expenditures, not covered under their Operating Budgets. For example, repairs required due to property damage or moving to an accessible office. To apply for one-time special request funding, Local Boards should contact their assigned Ministry staff person.

### Local Board Audit and Accountability Requirements

The Local Board Audit and Accountability Requirements (AARs) are contained within the OTPA's Schedule "H". They provide a full description of the Local Boards' Program funding categories. The AARs establish the requirements for governance and controllership practices to achieve financial accountability.

### Estimate of Expenditure Report

Local Boards will be required to submit their Estimate of Expenditure Reports (EERs) to the local MTCU office by the five due dates listed in Schedule "F" of the OTPA.

Payments may be delayed if complete reports are not received by the identified due date.

The EER template is available within the EOIS-SP Connect system. An [explanation of how to use the EER template](#) can be accessed on the EOPG.

If there is over +/- 5% spending reported for a reporting period, an explanation should be included outlining how the funds will be expensed in the remaining part of the year in the notes section of the EER.

If the Ministry determines there is a high degree of probability that the Local Board will be underspent at year's end, it is within the Ministry's discretion to adjust the next payment and/or issue an amendment to the Agreement.

If the Local Board reports that actual expenses are likely to exceed revenue, the notes should explain why expenses exceed revenues and how it will cover the costs for the remainder of the fiscal year. The Ministry will not entertain request for additional funding to cover anticipated operating deficits.

## Statement of Revenue and Expenditure Report

The Statement of Revenue and Expenditure Report (SRER) is required by **June 12, 2020**, reporting on the actual expenditures for the period of April 1, 2019 – March 31, 2020. This report is available in EOIS-SP Connect.

## Auditor's Report

Local Boards must provide an Auditor's Report when the Maximum Funds (set out in Schedule "B" of the Agreement) total \$150,000 or more, covering the period of April 1, 2019 – March 31, 2020, prepared in accordance with the AARs, and submitted on or before **June 12, 2020**. The Auditor's Report will include an opinion on the SRER.

## Additional reporting requirements

- Local Boards must share the AARs (Schedule "H" of the OTPA) with their auditors to ensure that the above report specifications are met in the Auditor's Report.

## SECTION 7 ROLES AND RESPONSIBILITIES

### Role of MTCU

The role of MTCU is to facilitate community capacity building by contributing funding, expertise and information to the Local Boards.

The regional MTCU office will support the Local Board partnership projects through discussions that enable the Board to identify the labour market issues faced in the community and develop and implement effective projects. Staff will make site visits and review reports received from the Board in order to monitor project expenditures, activities and agreement compliance and will evaluate the expected results and outcome against the agreement commitments.

### Monitoring

Regional staff will monitor Local Board activities throughout the year. Monitoring consists of review and evaluation of information gathered from reports received from the Local Board and from site monitoring visit(s). During the site monitoring visits, the consultant may request to see 'closed' files (previous year) and 'open' files (current year). The due dates for reporting to MTCU are listed in the Agreement (Schedule F). The date of a site monitoring visit is at the discretion of the Ministry. Notification of the monitoring visit will be provided to the Local Board well in advance of the date.

The principal purpose of a Local Board monitoring visit is to ensure that there is compliance with commitments set out in the Agreement. Monitoring visits are also an opportunity for the Ministry representative to have a more in-depth discussion with the Local Board about its activities and deliverables.

The monitoring visit will also give the regional staff an opportunity to meet the organization's staff, review the organization's project files and conduct an informal survey of the Board's partners. This is also an opportunity to assess the Board's progress in carrying out the activities noted in its Business Plan. The time that should be allotted for a monitoring visit may range from one or two hours to a full day.

### Role of the Local Board

Local Boards are responsible for adhering to good management practices in the maintenance of accurate progress and financial reports. Local Boards must ensure that the objectives, program terms and conditions are being met. Local Boards are also responsible for recording progress and accomplishments to-date, including the maintenance of accurate financial records, ensuring that funding is being used for its intended purposes. Beginning in 2019-20 all of Ontario's third-party funding Recipients are required to register their businesses on the [Transfer Payment Common Registration \(TPCR\) system](#) in order to ensure they receive their payments.

## SECTION 8 ADMINISTRATIVE AND COMMUNICATION GUIDELINES

### The Local Board OTPA

Local Boards are required to sign an agreement with the Ministry, which details all the accountability and legal requirements. The agreement between the Local Board and the Ministry specifies the legal responsibilities of the Board and the Ministry regarding the activities outlined in the Business Plan, which is available in EOIS-SP Connect.

The Agreement will be negotiated annually and will be used for monitoring, evaluation and accountability purposes.

### Intellectual Property

Upon successful completion of partnership projects, the Local Board owns all materials, if any, created or developed with funds under the OTPA. By virtue of receipt of funding, the Local Board grants to the Ministry a perpetual, irrevocable and royalty-free license to use the final project materials for any purpose except commercial gain.

Without limitation, the Ministry may update, revise, copy, translate or distribute the final project materials.

### Visual Identity and Communication Requirements

All communication materials are required to follow the Visual Identity and Communication Guidelines for EO Services. The guidelines address the following requirements in detail:

- Visual Identity (Typefaces, Palette and Writing Style and Tone)
- Web and Social Media
- Wordmarks
- Taglines
- Acknowledgement Lines
- Signage
- Organizations Providing Short Term Projects and/or Other Services
- Funding, Announcements, Ceremonies and Events
- Ongoing Communication Activities

The guidelines also include appendices for quick reference of requirements by program/project.

The most current version of the [Visual Identity and Communication Guidelines for EO Services](#) is available on the EOPG.

### French Translation Requirements

The Ontario *French Language Services (FLS) Act* requires access to services in French designated areas. In accordance with the Act, Local Boards shall make available the following information and/or documentation in both official languages:

- Local Labour Market Plan Update;
- Any publication, report, marketing materials available in print form and/or online, that is a publicly available product of a partnership deliverable approved under the OTPA – including the Employer One Survey summary report; and
- Any partnership database record for partnership projects approved under the OTPA.

NOTE: Any exception to the above requirements must receive prior approval from the Ministry.

Local Boards should develop their own policy with regards to the translation of other documents such as newsletters, press releases, job ads, member recruitment, administrative practices and procedures, governance (such as bylaws, board minutes, etc.) and any other document not listed above.

### **Accessibility for Ontarians with Disabilities Act (AODA), 2005**

Through the AODA, Ontario is developing mandatory accessibility standards that will identify, remove and prevent barriers for people with disabilities in key areas of daily living. Standards are being developed to achieve real results in stages. The AODA is expected to be fully implemented by 2025.

The areas addressed by the AODA standards will include: Customer Service; Employment; Information and communication; Transportation; and The Built Environment.

Additional information on the AODA is available on [Ontario's e-Laws website](#) (Frequently Accessed Law section)

Or through: Publications Ontario

777 Bay Street

Toronto, Ontario

Tel: 1-800-668-9938, or in Toronto at (416) 326-5300

## SUMMARY OF LOCAL BOARD 2019-20 REPORTING REQUIREMENTS

Deliverables	Due Date
<ul style="list-style-type: none"> <li>• Partnership Project records created in the Local Boards Online Partnership Database</li> </ul>	April 26, 2019
<ul style="list-style-type: none"> <li>• In-Demand Skilled Trades Project Plan</li> </ul>	July 26, 2019
<ul style="list-style-type: none"> <li>• Mid-Year Partnership Progress Report</li> </ul>	October 30, 2019
<ul style="list-style-type: none"> <li>• In-Demand Skilled Trades Project Final and Engagement Notes</li> </ul>	January 15, 2020
<ul style="list-style-type: none"> <li>• Local Labour Market Planning document including an updated Action Plan</li> </ul>	February 29, 2020
<ul style="list-style-type: none"> <li>• Employer One Survey summary report (if applicable)</li> </ul>	March 27, 2020
<ul style="list-style-type: none"> <li>• Year-End Partnership Progress Report</li> <li>• Continuous Improvement and Performance Measurement System (CIPMS) Report</li> </ul>	March 28, 2020
<ul style="list-style-type: none"> <li>• Partnership Project records updated and translated in the Online Partnership Database</li> </ul>	March 31, 2020
<ul style="list-style-type: none"> <li>• Estimate of Expenditure Reports</li> </ul>	August 13, 2019 October 10, 2019 December 11, 2019 January 13, 2020 April 3, 2020
<ul style="list-style-type: none"> <li>• Statement of Revenue and Expenditure Report</li> <li>• Auditor's Report, if applicable</li> </ul>	June 12, 2020