

Literacy and Basic Skills Performance Management System Training

Questions and Answers

In fall 2014, Literacy and Basic Skills service providers and support organizations took part in Literacy and Basic Skills Performance Management System Reports training. Here below are the answers to the 'parking lot questions' gathered at sessions held across the province.

Please note: The information contained herein is current as of May 2015. Changes to systems or tools used by the LBS program or the ministry (e.g., a new EOIS-CaMS release or further development of the Performance Management Framework or other elements) may affect the accuracy of the answers provided.

For more information, please visit the [Employment Ontario Partners' Gateway](#) website or contact your ministry consultant.

Information and Referral

1) Why are referrals only counted at exit?

All formalized referrals are documented and reported in the Employment Ontario Information System: Case Management System (EOIS-CaMS) while the learner is receiving LBS services.

As noted, formalized referrals filter into the Detailed Service Quality Report (DSQR) performance report when the learner exits the program and the service plan is closed. This allows for a fulsome evaluation of all of the services provided while the learner was in the program.

This approach is consistent for all indicators within the Customer Service and Effectiveness dimensions of the LBS Performance Management Framework and is also consistent across the LBS and Employment Service Performance Management Systems.

2) Why do service providers have to collect Information and Referral data in Report 60A?

Information and Referral is one of the five key services that service providers deliver as part of the LBS program. There are various references embedded within the [LBS Service Provider Guidelines](#) which inform service providers of their obligation to provide this service. As such, it is expected that service providers collect and analyze data to understand information and referral activities within their organization. Report 60A provides an overview of information and referral data on a monthly basis.

The section called *What the Report Data could be Telling You* in Unit 4 of the [Performance Management Report Training for Service Providers: Participant Guide](#) provides some suggestions on how service

providers can use the data within Report 60A to support evidence-based decision making within their site.

3) Is there a rating factor of the source of the referral under 'Referred In?' For example, is the rating higher for someone being referred from Ontario Works (OW) than from another community agency?

Within the LBS Performance Management Framework, referrals are not rated differently according to their source.

4) In order to have a referral count, does the individual being referred have to actually physically go to the referred place?

The ministry does not prescribe whether the individual physically goes to the other organization. This would depend on the type of the referral. For example, an LBS e-Channel learner would not be attending a program in person.

5) To be counted as 'Referred Out at Exit,' does the learner need to be registered with the agency they have been referred to? What level of documentation is required to count or record this referral?

Please review the chart in section 3.9.2 of the [LBS Service Provider Guidelines](#) (which outlines the indicators of service coordination (referrals in/out) and the definition for each. It also explains what is counted and not counted. You will note that client confirmation of their registration with the organization they have been referred to is typically required.

The nature of the documentation required to substantiate this is not prescribed by the ministry. It is however expected that service providers will have sufficient documentation on file to provide evidence that the referral occurred. This may be requested by the ministry at any time.

6) Why do the numbers on the Detailed Service Quality Report (DSQR) have ceilings/maximums?

Service Quality Scores (SQS) are based on a potential score out of 10. In order to ensure that the PMF is balanced, each of the measure has a maximum value that can be achieved.

Service providers are expected to meet the requirements within each of the measures of the 3 dimensions of the PMF (Customer Satisfaction, Effectiveness and Efficiency). For example, a service provider cannot achieve their overall service quality standard by over-performing in one measure to compensate for low performance in another measure.

To see how the DSQR numbers have been calculated, please see pages 23-27 of the [LBS Detailed Service Quality Report 64 User Guide](#).

Service Quality Standard

7) Will the Service Quality Standard (SQS) increase in 2015-2016?

No, the SQS will not increase in 2015-2016.

8) What is the source of SQS maximum values?

The maximum value is the maximum score that a service delivery site may attain in a particular measure. The maximum value in each dimension is calculated by multiplying the percentage weight for each measure by 10.

Please see unit 2 of the [LBS Performance Management Reports Training: Participant Guide](#) for further information. In addition, to understand how Service Quality Standards are calculated, please see pages 23-27 of the [LBS Detailed Service Quality Report 64 User Guide](#)

9) When did the ministry implement Phase IIA of the LBS Performance Management Framework?

Please see Appendix A of the [LBS Service Provider Guidelines](#) for information regarding the timelines for the phased in implementation of the LBS Performance Management Framework

Learners Served

10) Many Service Delivery Sites are working towards historical learner targets which may not reflect current demand or capacity. Will these efficiency targets be revisited?

The ministry operates on an annual business management cycle. Within the business management cycle, the service provider and the ministry work together to address the needs of the community and to ensure continuous improvement of the LBS program. Currently, individual budget and performance commitments are determined during the annual business planning process. Business planning is an essential element of LBS programming and an important component of the annual funding process.

Based on business plans, available funding, and input from the Literacy Services Planning and Coordination (LSPC) Committee, ministry staff make funding recommendations. To determine the appropriate level of funding, the ministry considers the various dimensions as indicated on Section 2.6 of the [LBS Service Provider Guidelines](#). If your organization has any questions about the business planning process, please contact your ministry consultant.

11) If a learner started in one fiscal year, and is learner counted as a carryover learner in the second fiscal year, can this learner still be counted as a carryover learner for a third fiscal year?

Yes, a learner will be counted as long as they have an active service plan (with a competency sub-goal in progress or completed) within the report period (or fiscal year).

The ministry does not prescribe the duration of a learner's service plan. However, it is important to note that training must be provided with enough frequency and intensity to produce measurable progress. The learner should commit a minimum of 10 hours per week to their learning to make sufficient progress and maintain the motivation necessary to achieve their goal.

Suitability

12) Why are Aboriginal, Deaf and Francophone included as separate suitability indicators when LBS already has designated streams?

Aboriginal, Deaf and Francophone are self-identified suitability indicators identified by individuals.

Stream designations are attributed to LBS service delivery sites. Designated cultural stream service delivery sites are designed to meet the cultural and linguistic needs of learners.

Learners who self-identify as Aboriginal, Deaf and/or Francophone may access LBS services at the service delivery site that best meets their particular needs.

13) Will youth be considered as a suitability indicator?

Youth is not currently under consideration as a suitability indicator for the LBS program.

14) What if a learner doesn't want to reveal their personal information?

Clients must provide information to confirm their eligibility for the program. Failure to provide this basic information could jeopardize their access to the program.

For voluntary self-reported information clients should be encouraged to provide as fulsome information as possible to assist the service provider in meeting their unique needs.

It is incumbent on the service provider to have procedures/policies in place to inform learners about why this information is being collected and how it will be used. This often means educating their staff to take the time to explain why this information is being requested, how it is used to evaluate the overall effectiveness of the program and how it will be protected.

Customer Satisfaction

15) If a client is not returning to the program, can the last survey be used for the exit client satisfaction survey?

No. Service providers must complete a customer satisfaction survey at exit using the question, "on a scale of 1 to 5, how likely are you to recommend the LBS program to someone looking for similar services?" This question can be found on the mandatory [Exit and Follow Up form](#). If the learner is not available to answer this survey question at exit, then the service provider should record the learner's response as "no response."

16) Can service providers conduct anonymous surveys for customer satisfaction?

Yes, service providers may, for their own purposes, conduct anonymous surveys to inform program evaluations. However, for MTCU purposes, Customer Satisfaction will be determined as a percentage of

all exiting learners who have completed the satisfaction survey and who rate the program as a 4 or a 5. These responses must be attributed to each learner in EOIS-CaMS.

17) Is there a percentage of customer satisfaction surveys that need to be filled out for LBS?

In LBS, the expectation is that all learners will be surveyed at exit. The LBS Customer Satisfaction question is part of the [LBS Exit and Follow-up form](#) which is a mandatory form to be used for all learners who exit the LBS program. Therefore it is expected that LBS service providers ask this question to all exiting learners.

Learner Progress

18) A carryover learner completed another milestone in the current fiscal year. Is it counted toward learner progress?

As described in section 3.9.1 of the [LBS Service Provider Guidelines](#), Learner Progress measures, during service and at exit, the percentage of learners who successfully complete at least one required milestone related to their individual goal path within the current fiscal year.

19) Can the Learner Gains measure be used without the Learner Gains Tool?

No, the ministry has not yet determined the standardized tool or tools that will be used by all service providers to measure learner gains. The performance measures within the mature state of the PMF (Performance Management Framework) are being implemented incrementally. The learner gains measure is being introduced in Phase IIB.

Performance Management System: General

20) Is there a tool that can help the board and/or other volunteers to better understand the Performance Management Framework?

Look to the EOPG for guidance [here](#).

21) Would attending and completing a one day training session be accepted by MTCU?

While the ministry does not require a specific minimum number of hours per week of training, training must be provided with enough frequency and intensity to produce measurable progress. The learner should commit a minimum of 10 hours per week to their learning to make sufficient progress and maintain the motivation necessary to achieve their goal.

Successful achievement of a learner's goal path within one day would suggest that the LBS program was not the most appropriate program for that individual.

Ontario Adult Literacy Curriculum Framework

22) Why are there no milestones for sciences?

Milestones are goal-related assessment activities that learners complete to demonstrate their abilities to carry out goal-related tasks. Each milestone is directly related to one competency and task level within the curriculum framework. The OALCF competencies—the broad, generic categories of learner’s abilities—capture and organize the learning that takes place in Ontario’s literacy program. The curriculum framework’s six competencies support learning regardless of a learner’s goals, backgrounds or interests. Learning activities related to science can be included within any of the competencies and task groups.

23) What is more important (that is, what should be the main focus): the completion of milestone tasks or the completion of a culminating task?

The focus for all programming decisions should be based on the overarching mandate of the LBS program: to help adults to achieve their goals of employment, apprenticeship, secondary school credit, post-secondary education and independence.

Milestones and culminating tasks are assessment tools which support the learner, service provider and ministry in evaluating the progress a learner is making while in the program, as well as their readiness to proceed to their next step destination. Neither tool is more important than another. Ultimately assessment tools should be used to inform service planning which will assist a learner in achieving their goals.

24) Can the milestones be broken down in smaller pieces so we can report successful completion of a milestone? That is, one piece with their name, one piece for the date, etc.

For detailed instructions on how to administer milestones, including what to do in the event a learner requires an accommodation, please refer to the Milestone User Guide available on the password-protected OALCF Repository.

Milestones have been designed to be used in their original form, following consistent administration and scoring guidelines. These measures ensure that the experience and outcomes related to attempting a milestone are equivalent for all learners. No changes can be made to the milestones themselves to adapt them for learners with special needs. This includes making any changes to documents, texts, prompts or questions or administering only partial milestones. Once all components of a milestone have been completed, then it can be recorded in CaMS.

25) What should be done when a learner is not successful in completing a milestone?

For detailed instructions on how to administer milestones, including what to do in the event a learner is not successful, please refer to the Milestone User Guide available on the password-protected OALCF Repository.

26) Is consent needed from a learner to do a culminating task?

The following criteria apply to those learners who will complete a culminating task:

- The learner has completed all elements of the learner plan.
- The learner has successfully completed day-to-day learning activities, tasks, milestones and integrated tasks at the same level (or higher) than those required in the culminating task.
- The learner agrees to complete the culminating task because he or she has consulted with the practitioner and feels prepared.

All learners who meet the above criteria should be encouraged to complete the culminating task. Ultimately, the learner and practitioner together determine when the learner is ready to complete the culminating task.

For detailed instructions on how to administer culminating tasks, please reference the Culminating Task User Guide available on the password protected OALCF Repository.

27) What is the definition of “completion of goal path?”

Completion of Goal Path is a measure of those who successfully complete all elements of the learner plan. There are three indicators of completion:

- Learners who complete all milestones;
- Learners who complete culminating tasks;
- Learners who complete the learning activities

In addition, the [LBS Detailed Service Quality Report #64 EOIS-CaMS Detailed Reporting User Guide](#) provides further details on the data sources and calculation of the three Completion of Goal Path indicators.

EOIS-CaMS: Reports

28) How does a learner become ‘inactive’? What impact does being 'inactive' have on the various reports and on our performance results?

Cases will be reflected as ‘inactive’ if they have not had any activities recorded in CaMS within the last 60 days or more.

Service providers should investigate if there are a significant number of inactive cases identified in Report 20.

You may wish to review the *What the Report Data could be Telling You* section in Unit 4 of the [LBS Performance Management Reports Training: Participant Guide](#).

29) Is an 'inactive learner' counted as a carryover learner?

An inactive learner, as in one who hasn't had any activity recorded in CaMS within the last 60 days or more, may be counted as either a new or a carryover learner depending upon their start date.

30) Are inactive learners included in the Service Quality Standard (SQS) of the Detailed Service Quality Report (DSQR)?

Yes, assuming they otherwise meet the requirements to be on the SQS of the Detailed Service Quality report as the 'inactive' state only applies to Report 20 - Inactive Cases Report and Report 61- LBS Case Activity Report and is not reflected in the CaMS system itself under the service plan's status. Cases will be reflected as 'inactive' on reports 20 and 61 if they have not had any activities recorded in CaMS within the last 60 days.

31) Will MTCU allow a few extra days after the end of the month for service providers to enter data?

It is expected that service providers input data into EOIS-CaMS in real-time, therefore the information should be current and up-to-date at all times.

32) If new or amended participant registration information becomes available, can a service provider subsequently revise the information in EOIS-CaMs?

Yes, service providers can revisit those questions and update CaMS with the complete information as it is their responsibility, as the business owners of data, to ensure that the data collected and entered into CaMS is accurate and complete. Please note, all updates must be completed prior to the closure of a service plan.

33) In Report 64, the 'Progress' core measure lists one indicator of 'per cent of learners who complete at least one milestone.' Does the milestone have to be completed or successfully completed/attained?

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

34) In Report 60D, 'Completions' refers to completions of all three indicators: Milestone, Culminating Task and Learning Activities. But in documentation, clients have been asked if they are willing to do one of the culminating tasks. If refused, should it be removed from completions?

No, culminating tasks should not be removed from the completion of goal paths. The purpose of a culminating task is to provide the learner, the practitioner, and MTCU with one of three indicators (learning activities, milestones and culminating task) which, in combination, provide these three groups with a reasonable assurance that the learner is ready to successfully and smoothly transition to his or her goal. Not only is the culminating task an indicator of transition readiness, but by capturing learner success in EOIS-CaMS, service providers will be helping to ensure that comprehensive learner outcomes are the basis for continuously improving the LBS program.

35) Can Report 61 and Report 64 be run on the same date to minimize reconciliation issues?

The run schedule for each of these reports is different: Report 64 LBS Detailed Service Quality Report is run monthly, whereas Report 61 LBS Case Activity Report is run weekly.

To assist service providers in their reconciliation activities, the EOIS Service Provider Reporting website retains a total of 56 weeks of Report 61 LBS Case Activity Reports.

36) What does “data is current as of X date” mean on the reports? What data does this include?

Each EOIS-CaMS report has been assigned a run schedule with pre-processed reports ranging from daily, weekly, or monthly run times. Report data is current as of the end of the previous business day.

The date and time that appears next to ‘This report’s data is current to date ...’ represents the last CaMS data refresh date (the date and time the reporting database last imported data from CaMS).

EOIS-CaMS: General

37) Do carryover clients need a fresh milestone every fiscal year to be counted as a learner?

Yes, to demonstrate ‘progress’ on Report 64, the learner must complete at least one milestone within the reporting period.

38) In the eligibility criteria, please explain the 10 per cent population exception limit (those below 19 years old).

On an exception-only basis, LBS service providers may serve young adults between ages 16 and 18 who demonstrate the maturity to benefit from adult education. However, returning to the regular school system should be the priority for these learners. LBS service providers may allow age exceptions, not exceeding 10 percent, of learners enrolled in a fiscal year. In all individual cases, there must be a documented rationale in the learner’s file. See section 3.1 of the [LBS Service Provider Guidelines](#) for more information.

39) Is it possible to allow the service providers to choose the exit date for a learner?

No, the service plan exit date is system-generated and cannot be edited. It is the date that the service plan was closed in the system.

40) Is the data dictionary adapted to the most recent EOIS-CaMS Release?

Please note: EOIS-CaMS Release 5.0 occurred on May 11, 2015. Supporting resources such as the LBS Guides and Resources, including the data dictionary, are being revised. For the most current resources, check the EOIS-CaMS [Guides and Resources](#) section of the EOPG.

41) Is there a clear definition of “milestone complete” in the LBS data dictionary?

No, the data dictionary does not define how a service provider determines a milestone to be complete.

Selection and user guides for milestones and culminating tasks are all available on the password protected OALCF Repository.

42) Can one learner have more than one active LBS service plan with the same site?

No. A learner can only have one active LBS service plan with one service provider. Clients may have concurrent service plans (open, approved or active) of different program types (i.e., a client could have active ES and LBS service plans at once). In addition, an LBS learner may also have multiple LBS service plans with any status (open, approved, active or closed) with multiple LBS service providers.

However, for programs such as ES and SJS there can only be one service plan (that is open, approved or active) assigned to the program participant at any point in time. The ability to support multiple LBS service plans for an LBS learner is exclusive to this program.

43) How long can a client be on the Case Activity Report (Report 61)?

Learners are filtered into the report based on their service plan being in an open, approved or active status, or being closed in the fiscal year. Therefore, the longest they could be shown on the Case Activity Report is any given fiscal year where they had a service plan in open, approved or active status.

The report runs weekly, available on Monday mornings, with a total of 56 weeks of reports being retained on the EOIS Service Provider Reporting site.

44) Can service providers have a CaMS sandbox to use to train their staff?

Yes, the Employment Ontario User Space is a sandbox that can be used for staff training. Once logged into ONE-Key, in the list of resources, you will find a link to the [Employment Ontario User Space](#).

As for additional resources, the [EOIS section of the EOPG](#) provides a series of training tools, resources, user guides and desk aids to support service providers with staff training.

45) Is there an icon in CaMS that takes users to the CaMS user guides?

No. All EOIS User [Guides and Resources](#) are available on EOPG. Service providers are encouraged to bookmark relevant EOIS User Guides for quick reference.

To access help for EOIS-CaMS reports, links to specific Detailed Reporting User Guides are provided on the [EOIS Service Provider Reporting](#) website.

46) Report 61 can be accessed for up to 56 weeks. Can this data be made available for a longer period of time?

If required, service providers can save local copies of reports from the [EOIS SP Reporting website](#) beyond the site's retention period.

General

47) How is 'disability' defined?

Please see section 3.9.1 of the [LBS Service Provider Guidelines](#).

48) How is 'training' defined? How is this different from the definition of 'education'?

The ministry expects service providers to use their professional judgement when determining if an activity is better defined as *training* or as *education*. The ministry suggests considering things including but not limited to the type of service provider who delivered the training/education (ie. training provider vs ministry of education/college/university), duration and intensity of the training/education, if a credential was provided and if so, what was it (certificate vs diploma).

Please see section 3.9.1 of the [LBS Service Provider Guidelines](#) for definitions of Referral out to *Training* and Referral out to *Education* which provide some examples under each category.

49) When a Francophone service provider serves a Francophone client, is it permissible for that service provider to ask the client to check/identify this indicator when it is left blank?

"Francophone" is defined on page 31 in section 3.9.1 of the [LBS Guidelines](#). Service providers should review the Participant Registration Form (including the notice of collection and consent) with the learner to ensure the learner's comprehension of the information that is being collected and the purpose for the information collected. The learner should be encouraged to complete the form as thoroughly as possible. Ultimately it is the learner's decision to disclose self-identification information.

50) If a participant identifies him or herself with English as their first language but prefers to receive service in French, will that be understood by MTCU or will that show MTCU that this French LBS service provider is serving English participants?

Consideration would be given to the fields that a learner selects on the LBS Participant Registration form, which is then entered into EOIS-CaMS. MTCU will read what is selected on the form as selected by the learner.

51) When will the LBS Learner Gains tool be implemented?

Specific timelines for the implementation of an LBS Learner Gains tool will be provided as they become available.