

# Employment Ontario Literacy and Basic Skills Performance Management System for Service Providers and Support Organizations

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## Participant Guide

MTCU Foundation Skills Unit, Service Delivery Branch (FSU-SDB)  
Parker Management Consulting Inc. (PMC Inc.)

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## Acronyms

- BI ..... Business Intelligence
- CaMS ..... Case Management System
- CI ..... Continuous Improvement
- DSQR ..... Detailed Service Quality Report
- EO ..... Employment Ontario
- EOIS ..... Employment Ontario Information System
- EOIS-CaMS ..... Employment Ontario Information System Case Management System
- EOPG ..... Employment Ontario Partners Gateway ([www.ontario.ca/eopg](http://www.ontario.ca/eopg))
- EER ..... Estimate of Expenditure Report
- IMS ..... Information Management System
- LBS ..... Literacy and Basic Skills
- LBS PMS ..... Literacy and Basic Skills Performance Management System
- LSPC ..... Literacy Service Planning and Coordination
- LSP ..... Literacy Service Plan
- OC ..... Organizational Capacity
- OPS ..... Ontario Public Service
- PM ..... Performance Measures
- PMF ..... Performance Management Framework
- PMS ..... Performance Management System
- QSAR ..... Quarterly Status and Adjustment Report
- ROI ..... Return on Investment
- SO ..... Support Organization(s)
- SP ..... Service Provider(s)
- SQS ..... Service Quality Standard

# Employment Ontario Literacy and Basic Skills Performance Management System for Service Providers and Support Organizations



## Introduction

# Introduction

## Background

The vision of the Ministry of Training, Colleges and Universities (MTCU) is:

**Ontario will have the most educated and highly skilled workforce in the world in order to build the province's competitive advantage and quality of life.**

The Ministry invests in the knowledge and skills of Ontarians to ensure they have maximum opportunities for success. Employment Ontario (EO) is the strategy to transform Ontario's labour market training and employment system into a coherent and comprehensive service delivery system. The Literacy and Basic Skills (LBS) program forms part of the overall EO 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 and support to help individuals and employers 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 enters, he or she will get the required help; and
- Work with employers and communities to build the highly skilled and educated workforce Ontario needs to be competitive.

## **OALCF and the LBS Performance Management System**

The LBS program contributes to the EO Service Promise by providing opportunities to adults to improve their literacy and basic skills. The LBS Program's Ontario Adult Literacy Curriculum Framework (OALCF) describes the literacy competencies adults need to pursue their goals of employment, further education (such as secondary school credit or post-secondary), training (such as apprenticeship or skills training) and increased independence. The OALCF links the LBS Program to the requirements of employers, educational and training providers and other community partners in an easy to understand way and furthers the EO promise of building a highly skilled, highly educated workforce in Ontario.

The OALCF is the cornerstone of the LBS program and provides direction to service providers on how to deliver learner-centered, transition-oriented programming that is based on adult education principles. Through the curriculum framework, the OALCF provides the standards to link the LBS program to the labour force and to the broader education and training system.

The OALCF is a broad term that refers to all the features of delivering competency-based programming. This includes:

- The six competencies;
- Three task complexity levels for assessment purposes;
- Descriptions of learner transitions to work, further education, training or independence;
- Service coordination and
- Resources.



Without foundational literacy abilities, individuals are significantly disadvantaged in their efforts to pursue their goals of a career, finding or maintaining employment, participating in further education and training opportunities and increasing personal independence. The LBS program provides adults with that foundation from which many doors can now be opened.

The LBS Program has two broad functions: service delivery and service development. While learner-centered, goal-directed, transitions-oriented and results-based service delivery is the primary function of the LBS Program, service development organizations work with service providers to support effective, efficient and quality service delivery.

Through the function of service development, service delivery providers are supported to deliver coordinated, quality services responsive to emerging needs as identified by communities and the government within an integrated training and employment system. The organizations funded to provide this support to service providers (SPs) are broadly referred to as support organizations (SOs).

There is an EO Service Delivery Framework within which the LBS program is to be delivered by a network of third-party service providers (SPs). It is based on the expectations individuals have for the delivery of services they will receive. Services are tailored to meet each individual's needs and are provided one-on-one, in group format and/or through eChannel distance delivery.

Key principles guide all of EO service delivery, including the LBS program.

- Accessibility
- Client-centric
- Quality
- Integration
- Cost-Effectiveness
- Accountability
- Community-based coordination

With the expertise and local knowledge of service providers, LBS provides the most appropriate service to individuals 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. In short, PMS support the delivery of efficient, effective, customer-oriented services.

# The Transition

The recent implementation of the Ontario Adult Literacy Curriculum Framework (OALCF), EOIS-CaMS<sup>1</sup>, and the LBS Performance Management System (LBS PMS) have required changes to all of MTCU's program delivery business practices, including business planning, contracting, data gathering and reporting, and fiscal management. The LBS PMS is being implemented in stages and will take several years to fully implement.

These recent changes to LBS have required, and will continue to require, service providers and support organizations to make significant changes as well. The recent changes to LBS will enable MTCU decision makers, support organizations and service providers to make informed decisions on the implementation of the LBS PMS, OALCF and EOIS-CaMS.

The LBS transition has required SPs to change service delivery practices and to build new management processes. During this stage service providers (SPs) are encouraged to be creative and innovative; the focus during this stage is to "find the right ideas". Mistakes are expected during the embryonic stage and the role of SP and SO leaders is to focus on continuous improvement: to continuously measure, plan, review, adjust, and celebrate successes (even the small "quick wins") in order to achieve, and maybe even exceed, Schedule E commitments.<sup>2</sup>

Significant organizational changes, such as the transition to OALCF, LBS PMS and EOIS-CaMS can impact team members on a personal level. Change is uncomfortable and it is important that SP and SO leaders support team members through this challenging time.

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<sup>1</sup> e-Channel service providers currently submit depersonalized learner data to the ministry through the e-Channel Interim Reporting Solution.

<sup>2</sup> Thanks to Scherer Leadership Center for the permission to use this content related to the "mature" and "embryonic" states.  
[www.scherercenter.com](http://www.scherercenter.com)

Eventually, leaders and team members will become more knowledgeable about the LBS PMS and become more comfortable and confident with the OALCF and collecting and analyzing data. The organization will, once again, be at the mature state and the new approach to performance management and measurement will be ingrained in the culture of the LBS services.

# MTCU Expectations for 2013–2014 and Beyond

In 2013–2014, the Ministry's strategic direction will focus on the continued implementation of the Ontario Adult Literacy Curriculum Framework (OALCF) for the LBS program.

Literacy Service Planning and Coordination (LSPC) activities will continue to focus on maintaining quality of service to communities and on continuing to build positive links to Employment Ontario programs and other community services.

## Service Providers

As outlined in their 2013–2014 Business Plan, LBS service providers must:

### **1. Facilitate seamless, effective learner transitions through:**

- Continuous improvement of evidence-based learner transitions between MTCU's Employment Ontario programs (LBS, Apprenticeship, Employment Services) and across programs offered through Ministry of Training, Colleges and Universities, Ministry of Citizenship and Immigration, and Ministry of Education; and
- Literacy Services Plans reflecting the input and participation of Employment Ontario programs, such as, Employment Services, Apprenticeship and Local Boards, and are responsive to emerging community needs.

### **2. Analyze and improve LBS Program performance through:**

- Collection and analysis of data related to the LBS performance measurement framework measures and indicators; and
- Application of evidence based results to improve the LBS service provider's performance.

### **3. Provide quality instruction to learners through:**

- The use of the service provider's performance results to inform professional development needs; and
- The provision of comparable and accountable on-line learning.

As noted, service providers are expected to integrate the EO service standards and ongoing continuous improvement into their work. In order to deliver quality service to MTCU, clients, learners, and communities, from a PMS perspective, it is necessary for service providers to continue to focus on the following areas this year:

#### **Achieve Contracted Commitments**

The expectations for 2013–2014 and beyond are for all LBS SPs to:

- Meet or exceed the LBS Phase I Service Quality Standard (SQS);
- Demonstrate organizational capacity for long term sustainability of LBS
- Ensure collected data reflects reality
- Demonstrate compliance with the MTCU agreement and LBS Service Provider guidelines; and
- Achieve continuous improvement targets as outlined in the 2013–2014 Business Plan.

### **Integrate Continuous Improvement**

In their 2013–2014 business plans, Service Providers defined two key strategies (i.e. one strength and one area for development) to continuously improve the delivery of LBS. Service Providers must integrate continuous improvement processes into the day-to-day delivery of Literacy and Basic Skills. This means on an ongoing basis SPs must:

- Understand LBS results achieved;
- 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 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 SPs to collect, monitor, analyze and report data for the purpose of continuous improvement. To plan effectively, SPs and MTCU require accurate and verifiable data to make informed business decisions. As LBS PMS 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. This means that performance results reported today will help to inform performance targets in the future. For this reason, 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 SP systems and hard copy learner files. Data must be reliable, accurate, complete and relevant in order to make evidence-based decisions.** As the “business owners of data” SPs are responsible for the verification and integrity of data at a site level. Although managers and Executive Directors may not require data for all their day-to-day tasks, understanding data and how it is used increases the SPs ability to link information, performance, and strategy more effectively.

The value of the information contained in operational and performance reports is only as good as 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.

## Support Organizations

As outlined in their 2013–2014 Business Plan, support organizations will continue to focus on the following:

- **Service Category 1:** Support seamless client/learner pathways across Employment Ontario, the Ministry of Education, the Ministry of Citizenship and Immigration (MCI), and the Ministry of Training, Colleges and Universities programs.
- **Service Category 2:** Support quality delivery by providing resource development and support (including instructional content, mode of instruction and assessment).
- **Service Category 3:** Support the improvement of service provider organizational capacity.



- **Service Category 4:** Support the collection and distribution of research findings and contribute regional, sector or stream perspectives to LBS related research projects.

## Purpose of Training

This one-day session will support the LBS third-party network to build the capacity required to deliver on the commitments identified in their business plans and to comply with LBS Guidelines and contracted agreements. It will support service providers to deliver effective, efficient, customer-focused and sustainable services, and highlight areas where support organizations can help build organizational capacity across the LBS provincial network.

The session will cover the three components of the LBS Performance Management System (LBS PMS): the Performance Management Framework (PMF), Business Intelligence (BI) and Continuous Improvement (CI).

By the end of the session participants will:

- Understand what the LBS PMS is and how it contributes to service quality excellence and a sustainable LBS service that makes a real difference for individuals and communities in Ontario.
- Understand the Performance Management Framework including: the three dimensions of service quality; the seven core measures and the Service Quality Standard; Service Provider Organizational Capacity; and Compliance with the LBS agreement and guidelines.
- Understand Business Intelligence including: the connection between the OALCF; the raw data entered into CaMS and service provider performance management and measurement; the importance of service and data integrity; service provider responsibilities; and EOIS-CaMS reports<sup>3</sup>.

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<sup>3</sup> In the case of e-Channel service providers: e-Channel performance reports.

- Understand Continuous Improvement including: the EO continuous improvement process; the MTCU annual business planning cycle; the Quarterly Status and Adjustment Report (QSAR); internal service provider operational planning; and ongoing data analysis.
- Understand the Employment Ontario Partners Gateway ([www.ontario.ca/eopg](http://www.ontario.ca/eopg)) resources available related to the above.

# Agenda

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

- An overview the LBS Performance Management System;
- Performance Management Framework;
- Business Intelligence;
- Continuous Improvement; and
- Next Steps.

# Employment Ontario Literacy and Basic Skills Performance Management System for Service Providers and Support Organizations



## Unit 1:

### LBS Performance Management System

# Unit 1: LBS Performance Management System

## Objectives

By the end of this Unit participants will:

- Understand the Performance Management System in the Ontario Public Service;
- Understand the components of the PMS: Performance Management Framework; Continuous Improvement and Business Intelligence; and
- Recognize that the LBS clients and learners are at the centre of the system.

# Performance Management in the Ontario Public Service (OPS)

Performance management is an outcomes- and evidence-based process that is comprehensive, is government-wide, 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.**

The Ontario 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, learners, 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. Each year, Ontario Ministries 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.

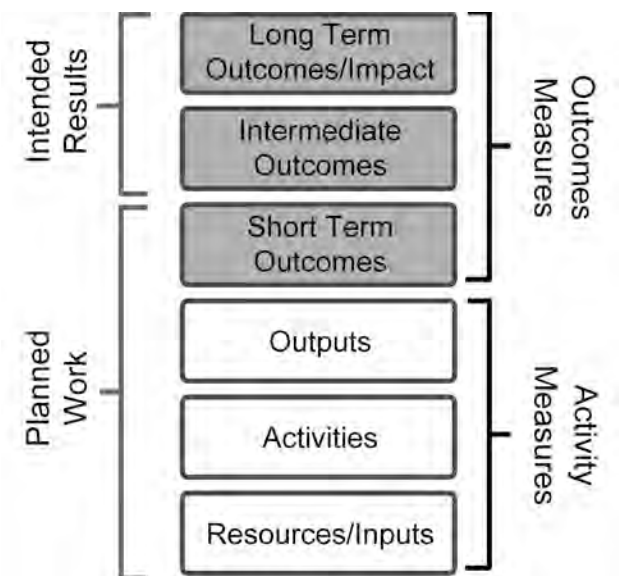
# Logic Model

A program logic model, a key component of a Performance Management System, is a picture of how organizations implement programs including the underlying theory and assumptions, "A program logic model links outcomes (both short- and long-term) with program activities/processes and the theoretical assumptions/principles of the program...a logic model and its processes facilitate thinking, planning, and communications about program objectives and actual accomplishments"<sup>4</sup>, in EO this is referred to as organizational capacity. Logic models are often used at the macro and micro levels, The Kirkpatrick Four Levels<sup>5</sup> Evaluation is a good example of how logic models can be used in the context of training design and delivery.

**PLANNED WORK** describes the resources needed to implement what the program intends to do.

- **Resources/Inputs** include the human, financial, organizational and community resources a program has available to direct toward doing the work.
- **Program Activities** are what the program does with the resources.
- **Activities** are the processes, tools, events, technology and actions that are an intentional part of the program implementation. These interventions are used to bring about the intended program changes or results.

## Logic Model



<sup>4</sup> W.K. Kellogg, "Logic Model Development Guide" pg. III <http://www.wkcf.org/knowledge-center/resources/2006/02/WK-Kellogg-Foundation-Logic-Model-Development-Guide.aspx>

<sup>5</sup> <http://www.kirkpatrickpartners.com/>



**INTENDED RESULTS** include all of the program's desired results (outputs, outcomes and impact).

- **Outputs** are the direct products of program activities and may include types, levels and targets of services to be delivered by the program.
- **Outcomes** are the specific changes in program participants' behavior, knowledge, skills, status and level of functioning. Short-term outcomes should be attainable within 1 to 3 years, while longer-term outcomes should be achievable within a 4 to 6 year timeframe. The logical progression from short-term to long-term outcomes should be reflected in impact occurring within about 7 to 10 years.
- **Long-Term Outcomes/Impact** is the fundamental intended or unintended change occurring in organizations, communities or systems as a result of program activities within 7 to 10 years.

## 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, learners, 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, support organizations, stakeholders, clients and learners have the same understanding of what's important, what's expected, and the incentives and consequences for performance and non-performance.
3. Is an MTCU enterprise-wide approach that builds organizational capacity to deliver and manage quality customer services, either directly or through a third party, across the LBS network.

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 and program design, development and evaluation.
6. Supports ongoing program development and innovation, priority setting (what gets measured, gets improved), resource allocation (what gets measured, gets 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 and 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.

Performance Management is important because<sup>6</sup>:

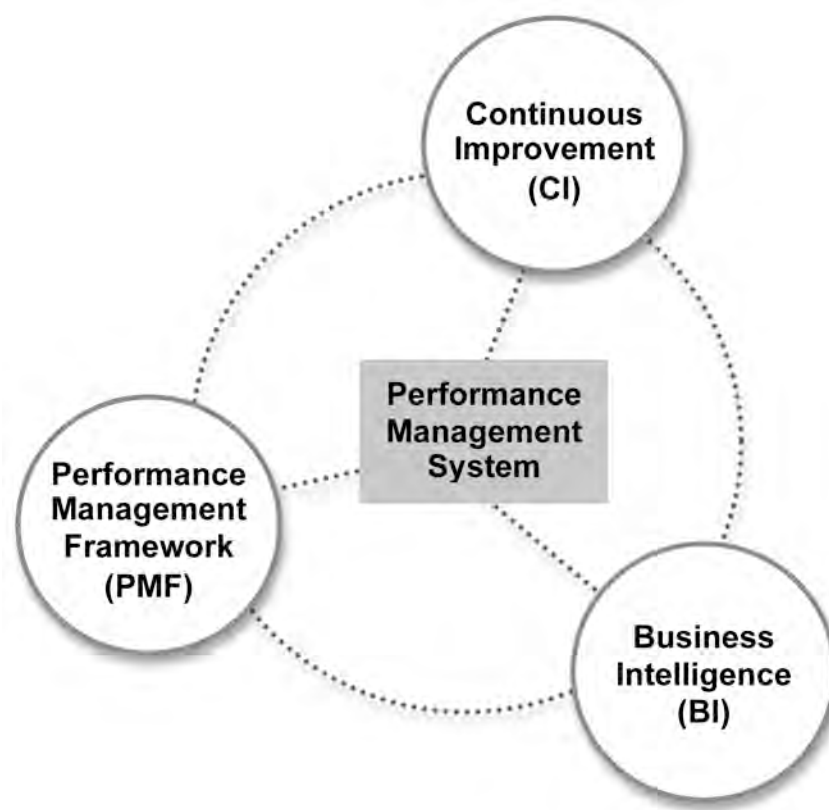
- What gets measured, gets done;
- If you don't measure results you can't tell success from failure;
- If you can't recognize success, you can't reward it;
- If you aren't rewarding success, you are probably rewarding failure;
- If you can't recognize success you can't learn from it;
- If you can't recognize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

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<sup>6</sup> From the Ontario Public Service (OPS) Performance Measurement Guide.

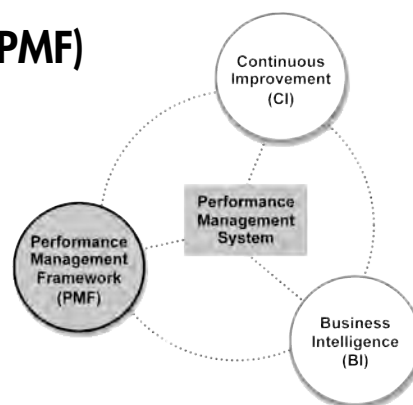
# The Components of a Performance Management System

A performance management system includes three inter-related components:



## The Performance Management Framework (PMF)

The Performance Management Framework (PMF) includes dimensions of service delivery and core measures to assess service provider performance and the overall performance of LBS. In a mature model, standards will be based on verified data about what is being delivered provincially.



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” or “one size fits all” approach to the delivery of LBS. In fact, LBS is designed to be flexible so service providers can respond to the unique needs of their clients, learners and communities.

The PMF includes three components which are used to measure the quality and sustainability of Literacy and Basic Skills. These are:

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

## Performance Management Framework—Mature Model (Phase II)



## Business Intelligence (BI)

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

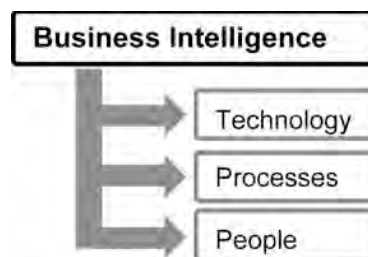
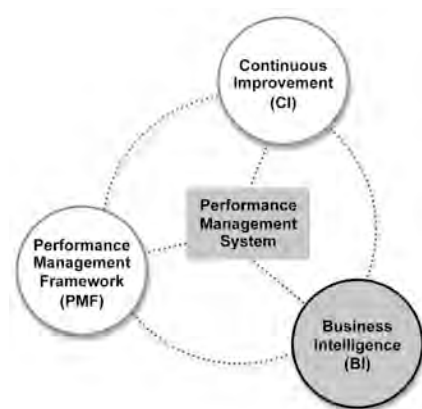
**Technology** includes an information management system, clear business rules and regular reports that support analysis of actual data against performance standards and planned targets and the ability to “mine” data for further analysis.

**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; and
- Policies and procedures related to the collection and analysis of data.

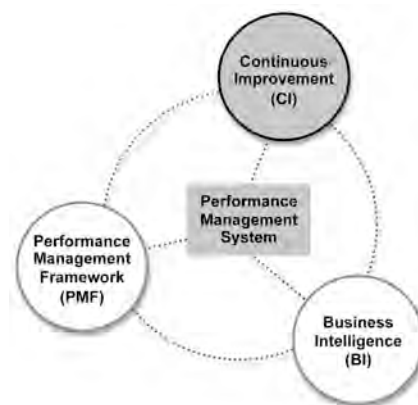
**People:** This includes the capacity of the human resources within the SP sites to:

- 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 LBS.



## Continuous Improvement (CI)

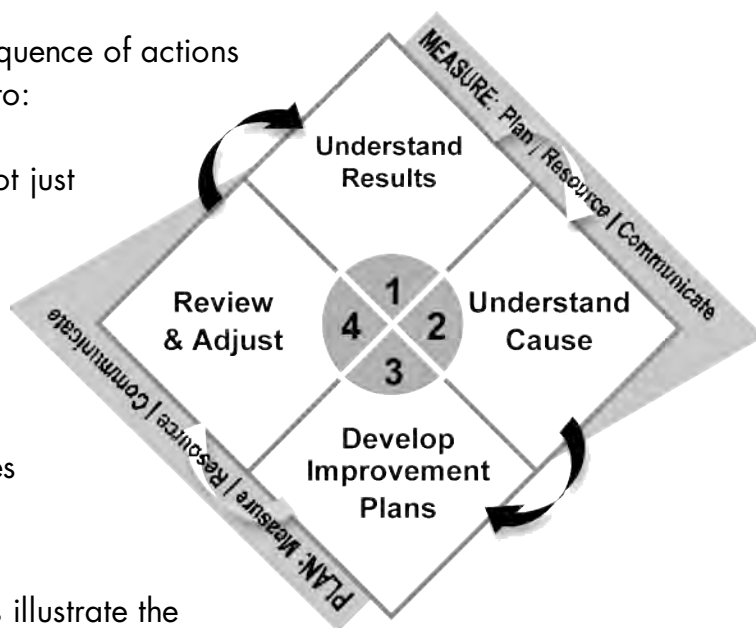
Continuous improvement<sup>7</sup> is the integration of performance measurement and business planning into the daily operations of an organization. Its purpose is to continuously seek to improve the quality of service, and if implemented in a clear, consistent way, it will enable even the strongest performing SPs to continue to improve.



The 2013–2014 LBS business plan requires each SP to integrate CI into LBS service delivery by understanding results, causes and improvement strategies related to SP strengths and improvement areas.

In EO the CI process is a logical sequence of actions which allows SPs, SOs 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.



The LBS Service Provider Guidelines illustrate the four steps of continuous improvement in relation to the annual business plan. These are standard steps which can be used for formal and informal planning at micro and macro levels.

<sup>7</sup> LBS Service Provider Guidelines, Continuous Improvement in the Ministry's Business Planning Cycle, 2.7.  
[http://www.tcu.gov.on.ca/eng/eopg/publications/2012\\_lbs\\_sp\\_guidelines.pdf](http://www.tcu.gov.on.ca/eng/eopg/publications/2012_lbs_sp_guidelines.pdf)

## LBS PMS Roles and Responsibilities

The LBS PMS clearly identifies the roles<sup>8</sup> of MTCU, SPs and SOs.

### MTCU:

- Defines the service, sets baseline standards for service delivery and quality e.g. policy, guidelines, reporting requirements, performance expectations, advice and guidance; and
- Ensures transparency and accountability e.g. funding decisions, monitoring, evaluating, performance and agreements.

### Service Providers:

- Deliver services in accordance with the agreement, service guidelines, performance and accountability requirements, standards and service provision agreements made through the Literacy Services Planning and Coordination process e.g. program strategies and operational plans, processes and procedures, service approaches and information and referral;
- Manage resources e.g. funding, budget oversight, financial and data systems; and
- Manage business systems and processes e.g. human resources, information, communication, customer service; organizational capacity; information and referral.

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<sup>8</sup> For further information regarding Roles and Responsibilities, LBS Service Provider Guidelines Section 2.3  
[http://www.tcu.gov.on.ca/eng/eopg/publications/2013-2014\\_lbs\\_sd\\_guidelines.pdf](http://www.tcu.gov.on.ca/eng/eopg/publications/2013-2014_lbs_sd_guidelines.pdf)  
LBS Support Organization Guidelines Sections 3 and 42  
[http://www.tcu.gov.on.ca/eng/eopg/publications/2013-2014\\_lbs\\_so\\_guidelines.pdf](http://www.tcu.gov.on.ca/eng/eopg/publications/2013-2014_lbs_so_guidelines.pdf)

## Support Organizations

(which include regional networks, stream, sector and services organizations):

- The functions and activities of the support organizations are similar in that they broadly provide support to service providers. All support organizations model continuous improvement and performance management practices as related to their business plan commitments to support LBS and SPs to continuously improve organizational capacity and service delivery.

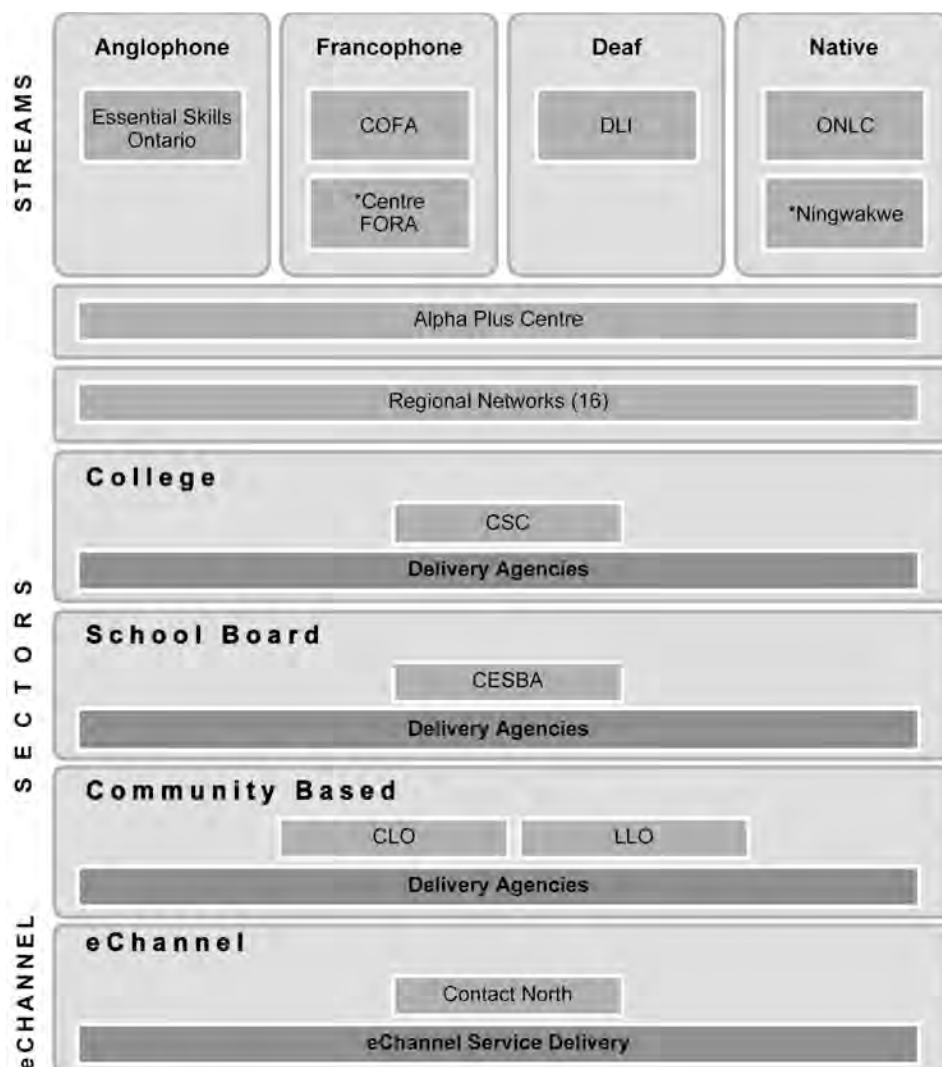
## Shared Responsibilities

The Ministry, LBS Service Providers, and LBS Support Organizations have shared responsibilities including, but not limited to:

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



## LBS Network



### Legend

ALPHAPLUS .....	Alphaplus Centre/Centre Alphaplus
CENTRE FORA.....	Centre Franco-Ontarien Des Ressources En Alphabétisation (Sudbury) Inc
CESBA .....	Ontario Association Of Adult & Continuing Education School Board Admin
CLO .....	Community Literacy Of Ontario Inc
COFA .....	La Coalition Ontarienne De Formation Des Adultes
CONTACT NORTH .....	Contact North
CSC/ACAATO .....	College Sector Committee/Association Of Colleges Of Applied Arts & Technology Of Ontario (Acaato)
DLI .....	Deaf Literacy Initiative
ESO .....	Essential Skills Ontario
LLO .....	Laubach Literacy Ontario
NINGWAKWE.....	Ningwakwe Learning Press
ONLC.....	Ontario Native Literacy Coalition
*Service development organizations	

## Above and Below the Waterline



Visualize an iceberg, whereby 10% of its mass is above the waterline and 90% is below the waterline. Relate this to the LBS service. The “iceberg” analogy is used throughout the session.

**“Above the waterline”** Similar to an iceberg, what the customer sees is “above the waterline”—these are the products and services SPs 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 management framework.

**“Below the waterline”** Similar to an iceberg, the largest part, typically 90%, is “below the waterline”. It is the solid business foundation of the service provider, or organizational capacity<sup>9</sup> (plan, measure, communicate, resource) to deliver on commitments to customers and to deliver sustainable customer focused, effective and efficient services.

It is the responsibility of the SP to manage well “below the waterline” to deliver on results promised to MTCU, communities, clients and learners. It involves integrating continuous improvement into the day-to-day business; to collect and use data to assess activities and results and to make solid business decisions to continuously improve LBS “below the waterline”.

All successful, sustainable organizations, regardless of business sector, manage above and below the waterline including MTCU. Experience indicates that if organizations appropriately and consistently manage business systems “below the waterline” the results will be achieved for customers “above the waterline”.

<sup>9</sup> The LBS Service Provider Guidelines includes more detail regarding organizational/service provider capacity indicators and definitions.

## Exercise: Primary Customers

Think of your primary customers, the person(s) or organization(s) without whose support your program would cease to exist. Who are they, what do they expect and how will they measure your success “above the waterline”?<sup>10</sup>

Your Primary Customers	Expectations	Success Measures

<sup>10</sup> Primary customers are defined as “the person(s) or organization(s) without whose support your program would cease to exist”.

## The Customer is at the Centre of the System

It is important for SPs and SOs to always be aware of the fact that LBS is a learner-centred, goal-directed, transitions-oriented and results-based service. Although there are many very important stakeholders, the service delivery revolves around primary customers: the clients and learners<sup>11</sup> accessing LBS services. They access services because they require support and trust the SP is able to deliver on results-promised. This does not mean that the SP must respond to every whim and wish of the client and/or learner; it means that the SP must engage them to determine their needs and to deliver timely and appropriate solutions to address their needs and/or refer to other service providers if appropriate. A collaborative relationship with clients and learners, where all parties understand roles and responsibilities, expectations and boundaries, is critical.

Another important primary customer to SPs and SOs is MTCU. MTCU continues to make significant financial contributions to the LBS delivery network and is committed to building consistent, quality, sustainable LBS services across the Province. LBS SP and SO agreements and Guidelines clearly outline MTCU's expectations and success measures, define the roles and responsibilities of the SP and SO and MTCU<sup>12</sup>, and highlight the importance of working in collaboration to increase service excellence.

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<sup>11</sup> As identified in the LBS Guidelines, "clients" refer to individuals utilizing Information and Referral (IR) services, learners and those entered into the full LBS service i.e. those with learning plans and EOIS-CaMS service plans.

<sup>12</sup> More detail about these roles can be found in LBS Service Provider and Support Organization Guidelines.

# Employment Ontario Literacy and Basic Skills Performance Management System for Service Providers and Support Organizations



## Unit 2:

### LBS Performance Management Framework

# Unit 2:

## LBS Performance Management Framework

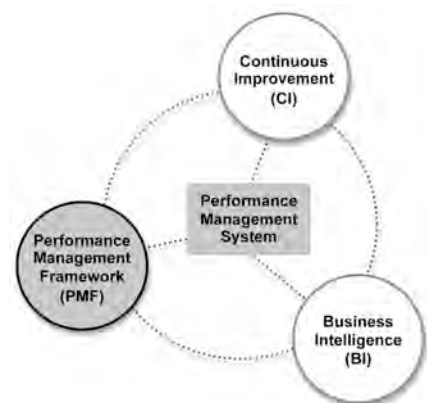
### Objectives

By the end of this Unit participants will understand:

- The components of the Performance Management Framework (PMF): performance measures, organizational capacity and compliance;
- The Service Quality Standard (SQS) including the 3 dimensions and 7 core measures;
- The reason for each core measure, data integrity issues related to each core measure and how to increase performance in each core measure;
- The 4 dimensions of organizational capacity (OC): measure, plan, communicate, resource; and
- SP responsibility to comply with LBS guidelines and agreements.

# The Performance Management Framework (PMF)

The Performance Management Framework (PMF) includes dimensions of service delivery and core measures to assess service provider performance and the overall performance of LBS system. In a mature model, standards will be based on verified data about what is being delivered provincially.



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” or “one size fits all” approach to the delivery of LBS. In fact, LBS was designed to be flexible so service providers and support organizations can respond to the unique needs of their clients, learners and communities.

The PMF includes three components which are used to measure the quality and sustainability of Literacy and Basic Skills. These are:

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

## Performance Management Framework— Mature Model (Phase II)



## 1. The Service Quality Standard (SQS)

The performance of the service provider and the overall quality of LBS **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 learners 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 LBS serves and the impact of the service received;
- **Customer Service:** measured by how satisfied learners are with the LBS service and how well the LBS program 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 E of the LBS agreement.



Each dimension has core measures within it and is weighted to demonstrate value and to “tell a story” about the quality of LBS delivery e.g. a measure of who participates in the service evaluates whether or not the program is serving the intended client group. The SP LBS agreement includes a Schedule E of performance expectations related to core measures. A “mature” LBS PMF (Phase II 2014–2015) will include all 7 measures nested under the 3 dimensions of service quality:

- Customer Service:
  - Customer Satisfaction of the learner
  - Service Coordination (i.e. referrals in and out)
- Effectiveness:
  - Suitability/Learner Profile (i.e. Suitability indicators)
  - Completion of Goal Path (i.e. milestones, culminating tasks, activities)
  - Progress (i.e. milestones)
  - Learner Gains
- Efficiency:
  - Learners served

Each core measure includes **data indicators**, consistent, reliable and verifiable data, that support each core measure; these include indicators related to the intended learner group, such as age and source of income.

The Schedule E of the SP agreement identifies the SP commitments and defines standard performance measures and the overall service quality standard. The data indicators are defined by MTCU and SPs enter raw data into CaMS related to the indicators; service quality reports include information on these data indicators which are used to monitor and evaluate performance.

Since MTCU is phasing in the LBS PMF, Phase I includes only 3 core measures that MTCU will be evaluating. The following table indicates the provincial core measure and service quality standard (SQS) which translate into the service delivery site’s Schedule E commitments.

## Phase I (2012–14)

Dimension	Measure	LBS Prov. Target	Perf. Comm. Ann. Target	Weight	Prov. Value	Target Value	Maximum Value
<b>Customer Service (33%)</b>	1. Customer Satisfaction	85%	85%	33.33%	2.83	2.83	3.33
<b>Effectiveness (33%)</b>	2. Suitability/ Learner Profile ▪ OW/ODSP ▪ Age (>45 to <64)	29%	29%	33.33%	0.97	.97	3.33
<b>Efficiency (33%)</b>	3. Learners Served	90%	100%	33.34%	3.00	3.34	3.34
<b>Service Quality Standard</b>					<b>6.80</b>	<b>7.13</b>	<b>10.0</b>

### Notes:

Past provincial results reported through the LBS Information Management System (LBS-IMS) indicate:

- Customer Satisfaction: 85% (85% of learners who exit will indicate overall satisfaction with the LBS Program).
- Suitability/Learner Profile:
  - OW/ODSP: 34% (34% of learners are in receipt of OW/ODSP);
  - Age (>45 and <64): 24% (24% of learners are aged over 45 and under 64).
- Target Achievement: 90% (90% of the targeted number of learners on the Schedule E achieved).

The interim SQS for Phase I has been set at 7.13

Phase II (i.e., mature state) starts 2014–15. The Ministry will start implementing the LBS Performance Management Framework through the 2014–15 business planning process. At that time, the Ministry will have enough baseline data to set new as well as revised targets for ALL seven measures within the framework and establish a new SQS. This information will be communicated to LBS service providers in the 2014–2015 business planning process. These targets and standards will form the base of the performance commitments within Schedule E of the 2014–2015 transfer payment agreement.

## Phase II (2014–15)

Dimension	Measure	Prov. Standard	Perf. Comm. Ann. Standard
<b>Customer Service (30%)</b>	1. Customer Satisfaction	85%	85%
	2. Service Coordination	TBD	TBD
<b>Effectiveness (60%)</b>	3. Suitability/Learner Profile (all 10 indicators)	TBD	TBD
	4. Learner Progress	TBD	TBD
	5. Completion of Goal Path	TBD	TBD
	6. Learner Gains	TBD	TBD
<b>Efficiency (10%)</b>	7. Learners Served	90%	100%

### Notes:

- The measure of Learner Profile will have to be redefined based on the full roster of indicators at mature state.
- The overall SQS (i.e. out of 10) will be determined based on analysis from data collection from Phase I.

It cannot be stressed strongly enough that although MTCU is specifically evaluating SP on three core measures, learners and community partners will have other expectations, some which relate to all seven core measures. It will be extremely difficult to build a solid business foundation “below the waterline” without understanding the full story. In order to incorporate continuous improvement into their day-to-day business, SPs need a complete picture of service quality, including data related to all seven core measures and other internal data the SP collects. This assures quality service is delivered now and builds a foundation for quality service in the future. The data tells a story; overlooking four core measures means the story will be incomplete. Therefore, SPs may not be serving the needs of clients, learners and communities and puts the LBS program as a whole, at risk. It is critical that data entered into CaMS is valid and reliable as it is contained in performance reports which are used to evaluate SP performance and to make business decisions to continuously improve LBS. There are several resources available on the Employment Ontario Partners Gateway (EOPG) related to CaMS data entry including the Literacy and Basic Skills Data Dictionary<sup>13</sup>. This dictionary provides very detailed information related to data elements; a thorough understanding of these elements can increase data integrity as SPs 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.

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<sup>13</sup> Data Dictionary. [http://www.tcu.gov.on.ca/eng/eopg/publications/eois\\_cams\\_lbs\\_data\\_dictionary.pdf](http://www.tcu.gov.on.ca/eng/eopg/publications/eois_cams_lbs_data_dictionary.pdf)

## Literacy and Basic Skills Reports

It is essential that SPs 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:<sup>14</sup>

- Performance Reports which integrate core measure standards, SP performance commitments by site, SP actual performance against the interim targets and financial details. The reports are cumulative for the fiscal year. MTCU and SPs use these reports to monitor and evaluate performance.
- Operational Reports provide a deeper level of data. This information can support SPs to monitor, manage and continuously improve LBS “below the waterline” on a regular basis, which demonstrates organizational capacity.

The “Service Provider Report-Quick Reference”<sup>15</sup> outlines the following report types:

Performance Reports:

- 64: Literacy and Basic Skills Detailed Service Quality

Operational Reports:

- 19A: Service Provider Follow-up Cases (for SP Manager role—shows due dates of 3, 6 and 12 month follow-up are due)
- 60A: Literacy and Basic Skills—All Data IR
- 61: Literacy and Basic Skills—Case Activity

Each report type has a Guide available on the EOPG which provides extensive detail.

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<sup>14</sup> EOIS-CaMS Service Provider Reports [http://www.tcu.gov.on.ca/eng/eopg/publications/eois\\_cams\\_reports\\_ref.pdf](http://www.tcu.gov.on.ca/eng/eopg/publications/eois_cams_reports_ref.pdf)

<sup>15</sup> [http://www.tcu.gov.on.ca/eng/eopg/publications/eois\\_cams\\_reports\\_ref.pdf](http://www.tcu.gov.on.ca/eng/eopg/publications/eois_cams_reports_ref.pdf)

## Detailed Service Quality Report 64

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

The report guide<sup>16</sup> is available at [www.ontario.ca/eopg](http://www.ontario.ca/eopg); it is recommended that it be used with the printed report as a reference document. (See Appendix 2 for LBS DSQ User Guide).

The Detailed Service Quality Report integrates the Interim Service Quality Targets; the Service Provider's performance commitments, and the actual YTD performance against the interim YTD targets. A review of this report provides a comprehensive view of each SPs performance.

Key Points regarding Report 64:

- It is the ONLY report currently used to evaluate site performance so it is important to review it monthly to ensure it is accurate;
- Most of the data in the report relates to CLOSED service plans;
- Service plans must contain one or more of the COMPLETED 'competency type' sub-goals to be a "learner served":
  - Find and use information
  - Communicate ideas and information
  - Understand and Use Numbers
  - Use Digital Technology
  - Manage learning
  - Engage with Others;

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<sup>16</sup> EOIS Case Management System Service Provider User Guide: Reporting Report # 64  
[http://www.tcu.gov.on.ca/eng/eopg/eotransformation/cams\\_reporting/eois-cams\\_reporting\\_lbs\\_dsq.pdf](http://www.tcu.gov.on.ca/eng/eopg/eotransformation/cams_reporting/eois-cams_reporting_lbs_dsq.pdf)

- If the only sub-goal selected from the "competencies" sub-goal type is 'learning activities', then the closed service plan will not be included in the report.
- The report only includes data from LBS Service Plans in either the "active" or "closed statuses", not "open" or "approved".

**Note:** Although in Phase I SPs will only be evaluated on the 3 core measures, the raw data for all core measures is being collected therefore Report 64 does include data for all 7 core measures.

## Exercise: Core Measures

		Customer Service		Effectiveness			Efficiency	
		1 Customer Satisfaction	2 Service Coordination	3 Suitability	4 Completions	5 Progress	6 Gains	7 Learners Served
Points to Ponder	What is the definition of this core measure and why is it important?			e.g. ensures the SP is responding to community needs and targeting clients/learners in need of services				
	What strategies could the SP implement to increase performance in this area?			e.g. ensure outreach and service aligns with community and client/ learner needs. Regardless of suitability indicators, if a client has a need for LBS services the SP should refer appropriately and/or provide LBS services				



## Exercise: Detailed Service Quality Report

The purpose of this exercise is to familiarize yourself with the specific areas of the Detailed Service Quality Report (see Appendix 3) that must be reviewed regularly.

In your review you will want to identify the following:

- ☐ 3 Service Quality Dimensions
- ☐ 7 Core Measures
- ☐ LBS Core Measure Provincial Targets
- ☐ SP Performance Commitment Annual Targets for Phase I (Schedule E core measure targets by SP)
- ☐ Year to Date Participant Core Measure Actuals—% target achievement, numerators and denominators
- ☐ % Year to Date Target
- ☐ Service Quality Phase I Provincial Target
- ☐ SP Performance Commitment Service Quality Phase I Annual Targets
- ☐ Allocations
- ☐ Expenditures

## 2. Organizational Capacity

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



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

LBS Guidelines<sup>17</sup> highlight **OC as it relates to collecting, monitoring and analyzing performance data** for the purpose of continuous improvement as highlighted in the following chart:

Dimension	OC Indicator	Definition
Planning	Demonstrated use of data	The SP has evidence that non-financial data is analyzed and evaluated to make both short- and long-term program/service changes that reflect local labour market and community needs.
Measuring	Results management	The SP has systems and processes in place to track performance against agreements and commitments and standards.
Resourcing	Administrative processes	The SP 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 a governance structure which has process/policies in place to ensure accountability to funders, clients/learners, the community and its own staff.

While organizational capacity is an inherent dimension of LBS PMS, it contributes indirectly to the measurable standard of overall service quality. Although each support organization (regional, sector, stream, service) has a distinct role, each support the improvement of SPs organizational capacity in some fashion.

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<sup>17</sup> See LBS Service Provider Guidelines p. 23

## Risk Assessment

The Ministry's new risk assessment methodology presents an opportunity for Ministry staff to build stronger relationships with service providers and for service providers to build capacity.

The introduction of a formal risk assessment methodology into the annual program management cycle enables the Ministry to identify potential risks to the achievement of the program objectives in several different areas and to engage service providers to proactively manage these risks before they have an impact on objectives.

The risk assessment methodology will also help the Ministry identify the most appropriate level of oversight and support needed to ensure an EO service provider meets program objectives.

The risk assessment process does not replace service provider monitoring. During the 2012–2013 fiscal year, monitoring and site compliance visits will proceed as normal. When the risk assessment methodology is fully implemented in 2013–2014, the risk assessment tool will be used to determine the most appropriate level of oversight required to ensure that program objectives are met.


### 3. Compliance to the Agreement and LBS Guidelines

All SPs have an agreement with MTCU and are expected to achieve the annual commitments within budget. LBS Guidelines provide extensive information regarding MTCU's expectations of service delivery and the OALCF.



These three elements (Service Quality Standard, Organizational Capacity and Agreement and Guideline Compliance) highlighted in the PMF, plus the achievement of improvement targets as outlined in the annual business plan, form the evaluation framework which allows SPs and MTCU to evaluate and continuously improve LBS.

# Employment Ontario Literacy and Basic Skills Performance Management System for Service Providers and Support Organizations



## Unit 3: Business Intelligence

# Unit 3: Business Intelligence

## Objectives

By the end of this Unit participants will understand:

- The definition of “business intelligence” and its role in program and learner service delivery;
- The LBS Services and Client/Learner Paths;
- The importance of data integrity to the whole Performance Management process and to develop learner plans;
- How the data collected into EOIS-CaMS is used to evaluate site performance and to make appropriate business decisions at the site, community and provincial levels; and
- The types of performance and operational reports available including Report 64.

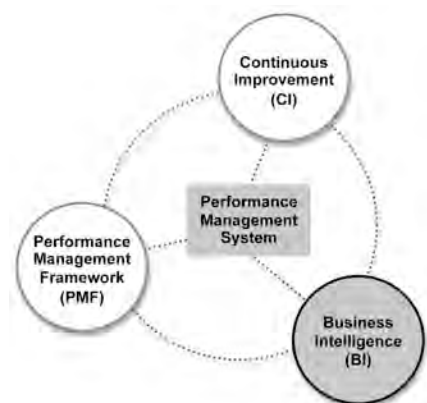
## Business Intelligence (BI)

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

### Technology

This includes, but is not limited to:

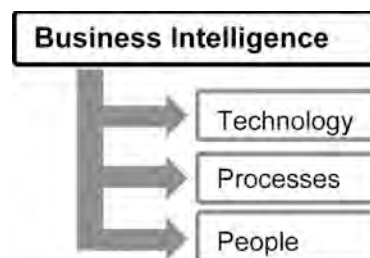
- An information management system;
- Clear business rules and regular reports that support analysis of actual data against performance standards and planned targets; and,
- The ability to “mine” data for further analysis.



### Processes

These 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; and
- Policies and procedures related to the collection and analysis of data.



### People

This includes the capacity of the human resources within the SP 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 LBS.



MTCU has built the foundation for business intelligence capability: the Employment Ontario Information System Case Management System (EOIS-CaMS); business plans; and agreements including Schedule E. The information entered into EOIS-CaMS supports the business intelligence capability of MTCU as well as your organization. Business intelligence capability is included in the “measuring” dimension of organizational capacity so you will need to determine what you need to do “below the waterline” to manage your business.

**The raw data entered into EOIS-CaMS, by the service provider, impacts the ability of SPs 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.**

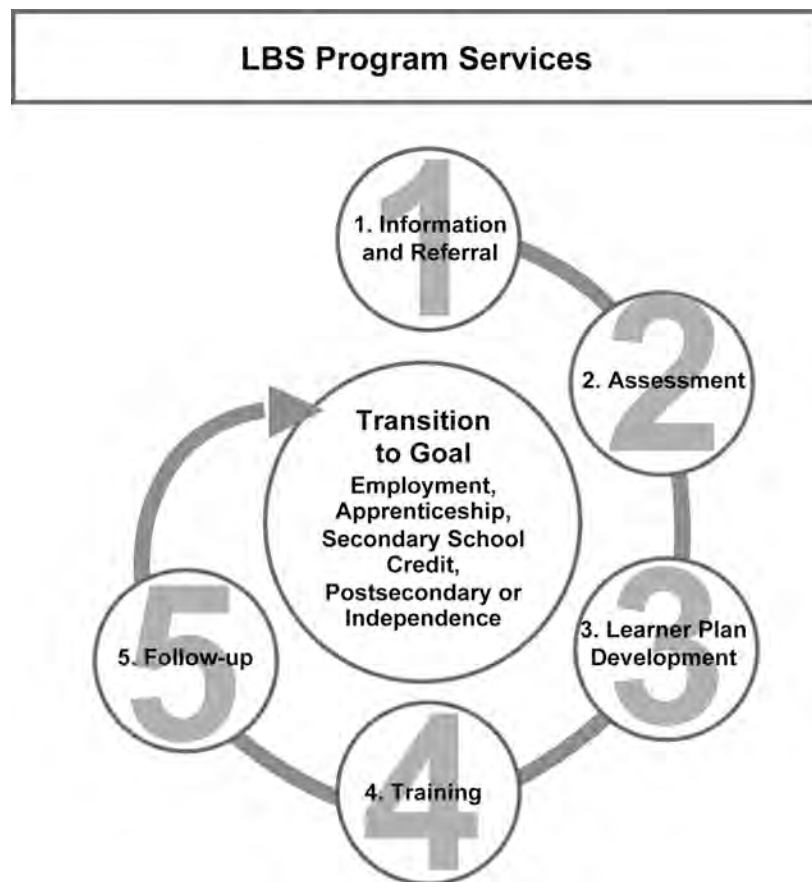
**Note:** While MTCU continues to focus on improvements to the technology—EOIS-CaMS—to support business intelligence, SPs need to strengthen business intelligence capacity as far as processes and people are concerned. This starts with ensuring that the SP LBS team has a clear and consistent understanding of LBS and how performance is measured.

## Service Delivery and Data

In outcomes-based services it is sometimes difficult to understand the importance of data, especially when it seems that data-related tasks take time away from serving learners. 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.

### LBS Program Services and Client/Learner Pathway

A clear understanding of the components of the LBS program, the OALCF and the client/learner goal path is an important first step on the road to data integrity and demonstrating service excellence.



As noted in the LBS SP Guidelines:

- **Clients** are adults who access Information and Referral or assessment services, but who will not be receiving LBS training services at your site.
- **Learners** are adults who receive LBS training services to achieve a milestone or learning activity and have a learner plan.

## Assessment and the Learner Plan

Assessment is a key component of the LBS program and **is embedded in all components of the service**, including Information and Referral (IR).

Assessment is any process or procedure that gathers information for making decisions about a learner's knowledge, skills, behaviours and abilities. It forms a critical part of everyday activities in a literacy program as decisions are made on how to best meet learners' needs. Assessment includes a wide range of approaches from **informal procedures to formal standardized assessments or tests**. LBS service providers conduct assessments at intake (upon registration), during programming (as part of program delivery), and at exit (when learners complete the learner plan).

Assessment determines which components of LBS are appropriate. Service providers monitor and adjust learner plans, and support clients and learners to access other EO programs and services and government and community services outside of EO.

As noted in the LBS SP Guidelines, SPs **must**:

- Confirm an individual's eligibility for LBS service;
- Determine an individual's primary service need and determine most appropriate referral if not appropriate for LBS service;
- Administer assessment to develop a learner plan, including assessment of learners':
  - Strengths and gaps
  - Learning style
  - Milestone tasks
  - Culminating task
  - Learning activities
- Use assessment tools that are appropriate, meaningful, understandable to the learner and are suitable for informing the learning activities outlined in the learner plan;
- Ensure that LBS service provider staff conducting assessments have the appropriate skills and training to select, administer, interpret and track assessment results;
- Ensure that Milestone and culminating task assessment activities are kept secured and are used according to the administration instructions;
- Assess learners' achievements as they progress through and complete their training including milestone tasks, the culminating task and the learning activities;
- Administer MTCU approved learner gains test (when available);
- Maintain up-to-date learner files that contain all required assessment information (see 4.2.2, Learner Files in the LBS guidelines); and
- Ensure that assessment results can be understood by other LBS service providers and by key referral agencies as agreed to through the literacy services planning and coordination process.

One purpose for gathering assessment information is to assist the SP and the client and/or learner to uncover needs and to design an appropriate service response for learners to achieve their goals.

The learner is a key contributor to all service decisions and must be actively engaged in the service decision process. A key decision, led by the SP, is whether to refer the client to other services and/or to engage them as a learner. The SP must work with the learner to develop the learner plan based on more in-depth analysis and assessments. The learner plan will incorporate, as appropriate, concurrent or sequential LBS components. The learner plan may evolve as learner needs change and as new opportunities arise, e.g. work with the learner may reveal that new sub-goals and plan items are required. Within the LBS service, SPs must:

- Develop a learner plan in collaboration with the learner based on need;
- Facilitate the progress of the learner by providing information and training guidance; and
- Support, monitor and follow-up with learners.

**Note:** The SP collects very important data during the development of the learner plan including raw data that is entered into EOIS-CaMS to create and adjust learner service plans. This raw data, once aggregated and reported, is used to evaluate the performance of SPs and the LBS program as a whole.

An “LBS Learner Plan” includes all of the information collected pertaining to a learner, the “LBS service plan” is the learner information entered into CaMS. An “LBS client” only accesses the Information and Referral component of the LBS service; the client becomes a learner when a Learner and Service plan are created.

LBS Client/Learner Pathway

Although the LBS Client/Learner pathway is linear, real client/learner service “pathways” are not necessarily as each client/learner’s pathway will be driven by his/her need and will be unique according to individual circumstances.

LBS Service Plan Flow

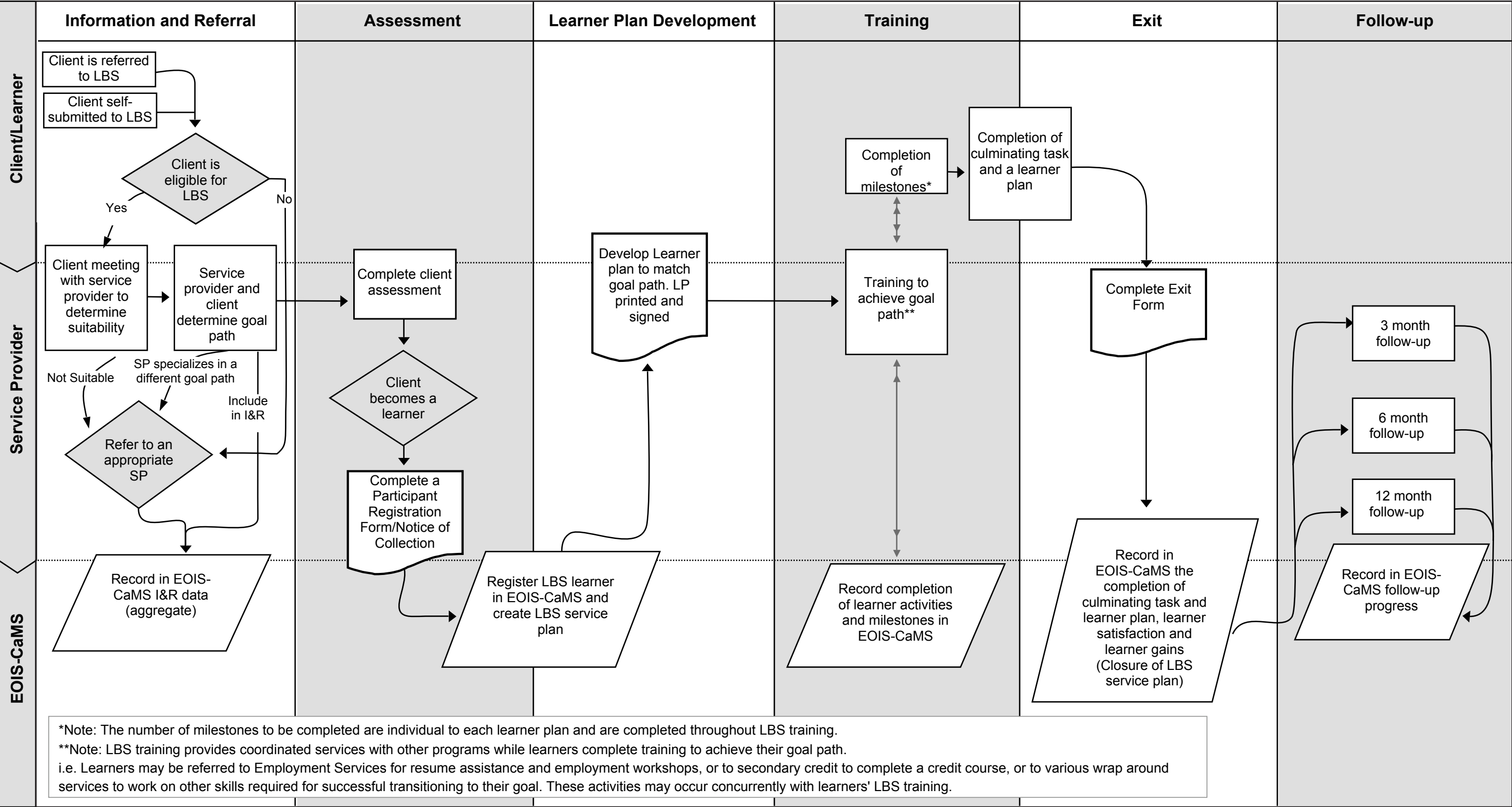
Legend

Process

Document

Data

Decision



## EOIS-CaMS and LBS

CaMS data entry begins when a learner service plan is entered into the system and ends when the follow-up obligations for the learner have been completed by the service provider<sup>18</sup>.

### The Literacy and Basic Skills Service Plan

The LBS Learner Service plan is used by SPs to plan, in an integrated manner, the delivery of services and activities to assist a learner in achieving a specific goal. Learner 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 learner, provide the tools necessary to construct the plan and then to track and monitor progress.

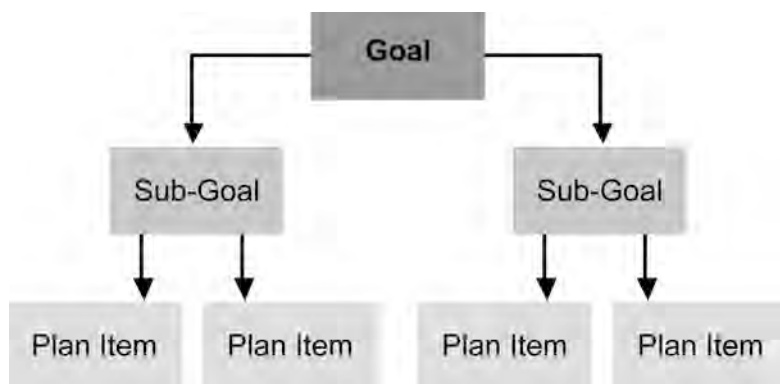
EOIS-CaMS allows SP staff working with learners to:

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

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<sup>18</sup> 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](http://www.tcu.gov.on.ca/eng/eopg/eotransformation/cams_day1/userguide/eois_cams_ch8_sp_management_es_sjs.pdf)

In EOIS-CaMS, LBS service plans are organized by **goals**, **sub-goals** and **plan items**<sup>19</sup>.



The **goal** is the overall outcome that the service plan is designed to achieve. The **goal path** is the route taken by the learner to achieve the following goals/outcomes:

- Employment
- Apprenticeship
- Secondary School Credit
- Post-secondary
- Independence

**Sub-goals** break the main goal down into more specific components—competencies, referrals and training supports. A service plan may have one or more sub-goals.

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

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<sup>19</sup> The Data Entry Tool for LBS Service Providers provides more information re: sub-goals and plan items (see Appendix 1)



There must be at least one sub-goal and plan item to open a service plan; additional sub-goals and plan items can be added later in service.

The data entry tool for LBS Service Providers provides more information regarding sub-goals and plan items (see Appendix 1).<sup>20</sup>

## Structure of the LBS Service Plan

LBS service plans are structured by a goal, sub-goals and plan items.

Goals	Sub-Goals	Plan Items
Employment Apprenticeship Secondary School Credit Post-secondary Independence	Competencies <ul style="list-style-type: none"> <li>• Find and use information</li> <li>• Communicate ideas and information</li> <li>• Understand and use numbers</li> <li>• Use digital technology</li> <li>• Manage Learning</li> <li>• Engage with others</li> </ul> Learning Activities Referrals Training Supports	Benefits Services Learning Activities

<sup>20</sup> LBS-CaMS Data Entry tool for further information.  
[http://www.tcu.gov.on.ca/eng/eopg/eotransformation/cams\\_day1/deskaid/eois\\_cams\\_data\\_entry\\_tool\\_lbs.pdf](http://www.tcu.gov.on.ca/eng/eopg/eotransformation/cams_day1/deskaid/eois_cams_data_entry_tool_lbs.pdf)

As mentioned, formal and informal assessment inform the development of learner plans and, ultimately, the achievement of positive outcomes. To make appropriate service decisions, SPs must have “business intelligence” to develop learner plans:

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

For MTCU and SPs to be confident that the data in EOIS-CaMS, and in reports, is valid and reliable, at a minimum, all SP staff delivering LBS service, including those entering data into CaMS, must have a consistent understanding of:

- LBS pathway and related service components;
- The dimensions and measures related to LBS service quality; and
- The data indicators/plan items related to each measure.

# Employment Ontario Literacy and Basic Skills Performance Management System for Service Providers and Support Organizations



## Unit 4:

## Continuous Improvement

## Unit 4: Continuous Improvement (CI)

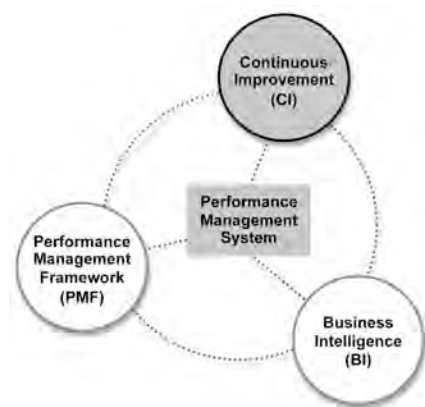
### Objectives

By the end of this Unit participants will:

- Understand Continuous Improvement including the EO continuous improvement process and the MTCU annual business planning cycle;
- Recognize the importance of data analysis and reporting to assess the quality of service being provided to clients and learners;
- Examine the relationship between site data collection and the LBS performance reports; and
- Evaluate site performance against provincial standards and agreement commitments and identify challenges to be expressed in the Quarterly Status and Adjustment Reports (QSARs).

# Continuous Improvement

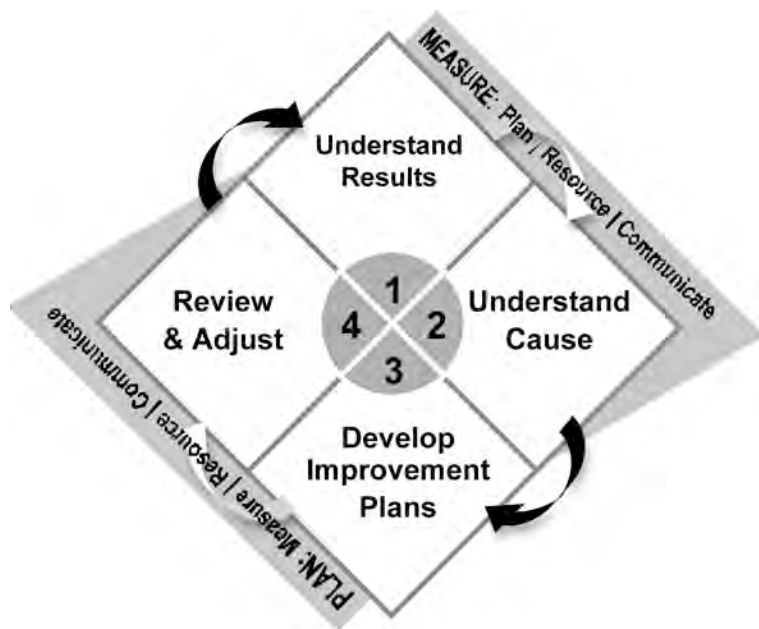
As mentioned previously, continuous improvement is the integration of performance measurement and business planning into the daily operations of an organization. Its purpose is to continuously seek to improve the quality of service, and if implemented in a clear, consistent way, it will enable even the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



## Continuous Improvement Process

The EO LBS CI process is a logical sequence of actions which allows organizations to:

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



As indicated in this diagram, the dimensions of organizational capacity (measure, plan, communicate and resource) are embedded in the continuous improvement process. Understanding results and causes involves learning from experience and uncovering facts (rather than opinions) to make evidence-based decisions. Organizations that consistently integrate the continuous improvement process into their day-to-day business demonstrate business intelligence.

## Data Analysis

Embedded in the continuous improvement process is data analysis, especially in Step 1–Understanding Results and Step 2–Understanding Cause. Data analysis in LBS is critical to ensure MTCU and service providers make solid business decisions. As mentioned in Unit 2, from an organizational capacity (OC) perspective, a SP is required to demonstrate use of data. (i.e. the SP has evidence that performance data is analyzed and evaluated to make both short- and long-term program/service changes that reflect client/learner, 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... It is important to pay attention when data analysis is presented, and to think critically about the data and the conclusions which were drawn.”<sup>21</sup>*

It is helpful when analyzing data to apply “systems thinking”<sup>22</sup>, 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.

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<sup>21</sup> <http://www.wisageek.com/what-is-data-analysis.htm>

<sup>22</sup> Senge P, (2006), The Fifth Discipline.

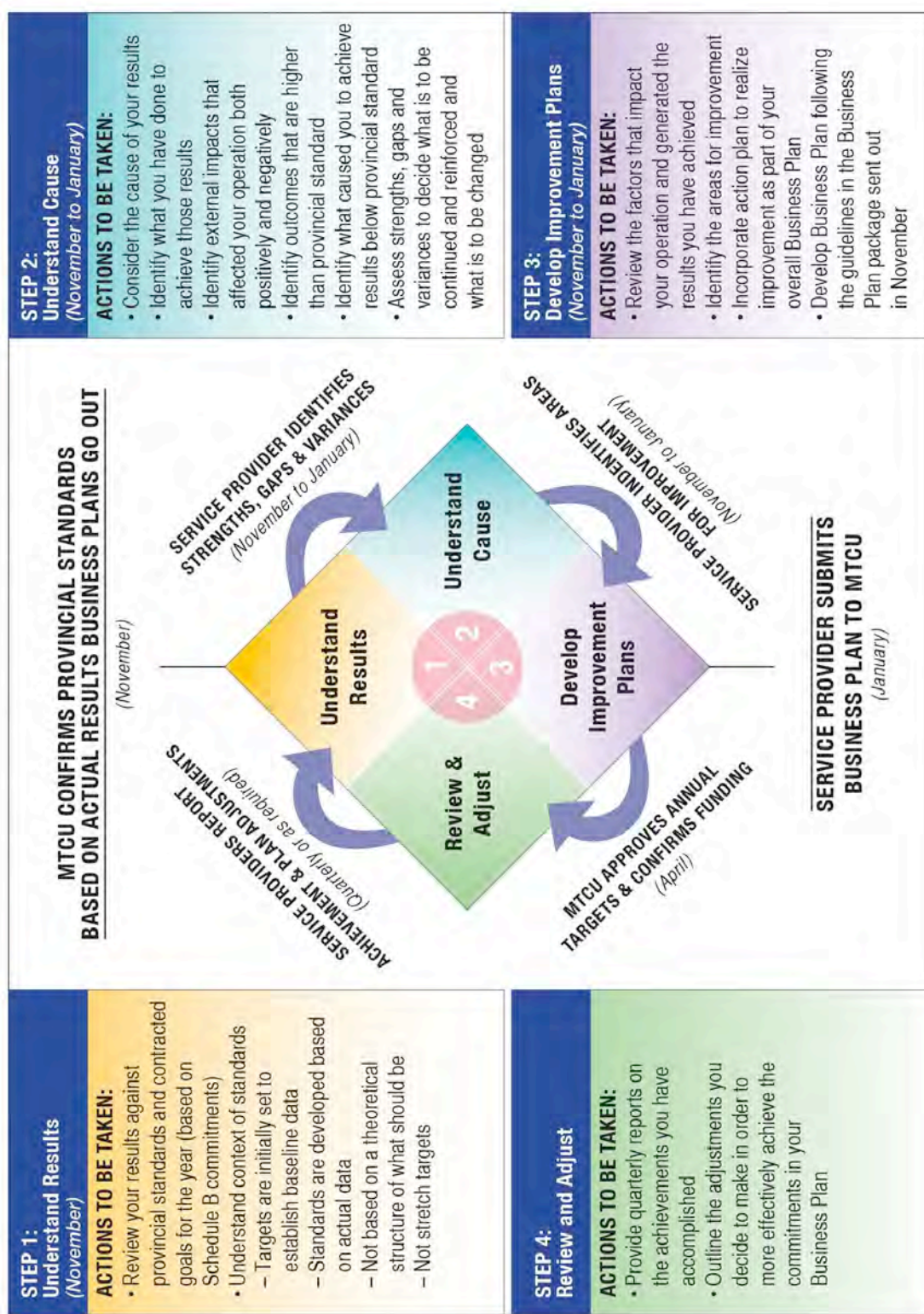
# Annual Business Planning Cycle

In LBS, the annual business planning cycle sets the stage for ongoing continuous improvement. The annual business planning cycle involves:

- Business Planning
- Reporting
- Monitoring

Since the LBS performance management system is evidence-based, SPs must ensure the raw client/individual data entered into EOIS-CaMS is valid and accurate as it is the primary data MTCU uses to determine if a SP is achieving its contracted commitments. The raw data feeds directly into the Detailed Service Quality Report #64, which directly relates to the Schedule E. MTCU and SPs use the aggregated EOIS-CaMS data to “look back” and to “look forward”—to understand results and their causes (measuring) and to develop, review and adjust improvement plans (planning) at the macro and micro levels.







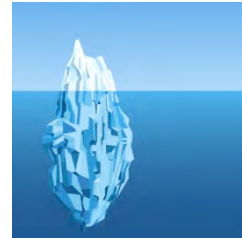
## Business Planning

MTCU operates on an annual business management cycle.<sup>23</sup> Within this cycle, the SPs, SOs and MTCU work together to address the needs of the community and to ensure continuous improvement of the LBS Program.

The annual business plan addresses the SPs commitment to service levels, service quality standards and continuous improvement targets.

### **Below the Waterline Opportunity!**

Planning is a dimension of organizational/service provider capacity as results need to be achieved by design not by accident. Although not directed by MTCU, service providers should be business planning and monitoring on a daily, monthly and quarterly basis “below the waterline”. Solid business planning at the macro and micro levels allow you to build a solid, sustainable organization.



#### **Point to Ponder:**

How do you measure your results and plan for improvement on an ongoing basis?

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<sup>23</sup> LBS Service Provider Guidelines, Continuous Improvement in the Ministry’s Business Planning Cycle, 2.7.

# Reporting

As noted in the SP agreement, service providers are required to report to the Ministry on the delivery of LBS services and the use of funds provided by the Ministry. Service providers are required to report in three areas:

1. **Learner/Individual Data**—Individual learner-level data and outcomes, reported through EOIS-CaMS. Data elements for reporting are clearly defined so that results from different service delivery sites are comparable.
2. **Service Provider Performance by service delivery site**—reported through the Quarterly Status and Adjustment Report (QSAR).
3. **Financial Management and Accountability**—reported through Estimate of Expenditure reports, the Statement of Revenue and Expenditure Report as well as the yearly Audit.

**Note:** Although EOIS-CaMS includes allocation and expenditure information, this report is not appropriate for financial management.

## Reporting Learner/Individual Data

Collecting and reporting individual data is done by the SP using the EOIS-Case Management System. Part of the MTCU consultant's monitoring responsibilities is to validate that reported data from a site level is valid and accurate. The analysis of the collected data is done by both the SP and MTCU staff and provides valuable information for the monitoring, planning and improvement process.

SPs should have quality assurance systems in place "below the waterline" to ensure the data is entered and is accurate, e.g. data entered into EOIS-CaMS must be supported by documentation, including rationale, in physical learner files.

## Exercise: Data Integrity

It is the responsibility of SPs, 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 do your site(s) have in place prior to closing an LBS learner plan and EOIS-CaMS service plan?

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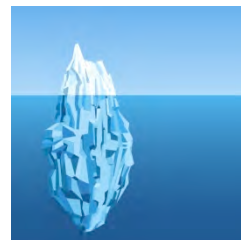
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## Below the Waterline Opportunity!

As a service provider or support organization, it is important that you build organizational capacity “below the waterline” to ensure LBS services are appropriate and timely.



### Points to Ponder:

What do you think you need to record and/or monitor “below the waterline” to ensure your services are appropriate and timely? What are the risks if you don’t? What are the benefits if you do? For example: Although MTCU only requires SPs to survey learners after exit to determine level of satisfaction with services, SPs need to consider collecting additional qualitative and quantitative information from learners *during* service to ensure LBS is meeting their needs and, if not, SPs should adjust services accordingly.

## Quarterly Status and Adjustment Report (QSAR)

The QSAR, a mandatory reporting tool, provides a consistent approach for SPs to report to the Ministry. It requires that SPs review their performance commitments/deliverables and budget management for each funded service delivery site. These are identified in the organization's LBS business plan and are included in the LBS agreement. Through the QSAR, the organization has the opportunity to describe any adjustments to business practices that are being made in order to achieve performance commitments and deliverables by the end of the next quarter or by year end.

**Report #64—Literacy and Basic Skills Detailed Service Quality (LBS-DSQ)** is the key resource to support the organization's analysis to prepare the QSAR.

### Schedule and Procedure for QSAR Submission

The Ministry expects SPs to meet the QSAR submission deadlines indicated in the template. The organization must follow the reporting cycle described below:

1. LBS service plans must be closed by month end to be included in Report #64—LBS DSQ.
2. Report #64—LBS DSQ is available monthly on the second Monday of the month.

3. The organization will have ten (10) business days from the date that the finalized LBS-DSQ reports are posted to the EOIS Service Provider Reporting website (including the day of posting) to submit the QSAR to the Ministry Consultant<sup>24</sup>.
4. Report #64—LBS DSQ identifies the LBS interim target; performance commitment targets and the Year-to-Date (YTD) actual for each core measure. SPs are asked to compare actual performance for each site with the LBS interim target and the performance commitment target. The SP will report on any areas at risk in meeting the target and identify any business practice that needs to be adjusted to ensure that the target is met by year-end.

## QSAR Process

The Service Delivery Site is required to complete the QSAR on a quarterly basis and submit to MTCU at pre-determined times. Service providers will use the QSAR to report on any budget or performance commitments that are not being met, as well as adjustments being made to achieve them.

MTCU staff will provide written feedback to acknowledge the QSAR submission and to identify any Service Delivery Site actions/strategies that are outside of MTCU program policy and/or direction. Further discussion of results and strategies to meet targets may also occur. MTCU expects SPs to demonstrate that: they understand the results they need to achieve and why they are not achieving them; they know what their actual results are telling them; and they develop and implement improvement plans. These are key activities to manage an effective, sustainable organization.

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<sup>24</sup> E-Channel service providers currently submit QSARs on a quarterly basis 10 business days after receiving their e-Channel interim reporting solution activity report.

## QSAR Questions 2012–2013

1. Please identify any Schedule E budget and/or performance targets that have not been achieved this quarter and the strategies and actions you plan to take to achieve these targets by year-end.
2. Are your expenditures aligned with your business plan commitments?
3. What are the actual percentages of learners served within each of the five OALCF goal paths compared to your projected numbers as indicated on page 4 of the site's 2012–2013 business plan?

## Exercise Detailed Service Quality Report

In order to complete the QSAR you must have a clear understanding of your actual results, your strength areas and those areas that require improvement; the Detailed Quality Service Report is an important part of understanding your results/performance.

The purpose of this exercise is to understand the case study's current performance against their Schedule E commitments.

### Instructions

1. Review the sample Detailed Quality Service Report (Appendix 3) and fill in the three columns for each core measure: LBS Provincial Target (LBS Prov. Target), Performance Commitment Annual Target (Perf Com Ann. Target), Year-to-Date All Participants Actual (YTD All Participants Actual).
2. Calculate the variance for each core measure.

Dimensions and Core Measures	LBS Prov. Target	Perf Com Ann. Target	YTD All Participants Actual	Variance (+ -)
<b>Customer Service</b>				
Customer Satisfaction				
Service Coordination	TBD	TBD		
<b>Effectiveness</b>				
Suitability Phase I				
Completions	TBD	TBD		
Progress	TBD	TBD		
Gains	TBD	TBD		
<b>Efficiency</b>				
Learners Served				
<b>Interim Service Quality Target</b>				



## Exercise: Quarterly Status Adjustment Report— Understand Results and Causes

In order to identify improvement plans (strategies and actions) in the QSAR you must first understand why you are achieving the results so you can design the best course of action (remember: diagnosis before treatment!). Causes are business or management processes that if changed can improve core measures; they are factors within your control.

The purpose of this “below the waterline” exercise is to help you to think through the case study’s performance to date and consider the potential causes of this performance. When analyzing cause, it is important to go from the whole to the parts—from the forest to the trees.

Review the table from the previous exercise and look for a story the data is telling you.

What is your overall impression of this service provider’s performance?  
Have any Schedule E performance commitments not been achieved?

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What are the potential causes for performance or non-performance?

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What additional information would help you understand their current performance?

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## Exercise: Quarterly Status and Adjustment Report— Develop Improvement Plans

What are the areas of improvement you think they should include in their QSAR? Why?

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What strategies, within their control, might assist them to increase their performance?

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## Reporting Roles and Responsibilities

### Service providers will:

- Examine and analyze monthly operational and performance reports, specifically the LBS-Detailed Quality Service Report to monitor performance;
- Complete the Quarterly Status and Adjustment Report;
- Complete the Estimate of Expenditure Report for each funded site; and
- Submit an Audited Statement of Revenue and Expenditure Report.

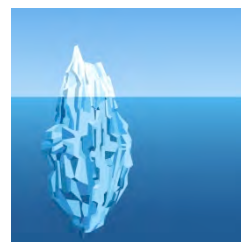
### MTCU will:

- Review the Quarterly Status and Adjustment Report;
- Review and analyze the monthly LBS Detailed Service Quality Report;
- Review service provider core measure targets, service quality targets, performance and budget commitments and actuals using Schedule E of the agreement and business plan and
- Review the Estimate of Expenditure reports.

MTCU will review monthly LBS-Service Quality Reports to identify if service providers are meeting or exceeding their interim targets.

## Below the Waterline Opportunity!

In addition to complying with MTCU reporting requirements the QSAR provides the opportunity for internal business planning, the QSAR could be an “output” of internal business planning to demonstrate your organization’s capacity to measure and plan “below the waterline” to build a solid business foundation.



Once you understand what the reports are telling you, you can start to think about how you can use the data “below the waterline” to build organizational capacity and to support continuous improvement.

Standard business self-assessment often includes processes to:

- Understand Results: to have a clear understanding of the organization’s actual results, its strengths and areas requiring improvement;
- Understand Cause: to have a clear understanding of why the organization is achieving (or not achieving) results;
- Develop Improvement Plans: to develop a plan to build on strengths and address areas requiring improvement; and
- Review and Adjust: to assess progress toward desired outcomes, celebrate successes and take corrective action as necessary.

### Points to Ponder:

What internal structures and processes do you have in place to celebrate successes and continuously improve your LBS services?

# Monitoring

The principle purpose of monitoring process is to ensure that service providers are complying with their agreements and that the funds are spent as specified. In addition, the process is meant to provide the Ministry with information regarding compliance to the LBS guidelines and to demonstrate organizational/service provider capacity. Monitoring can be achieved through both a formal and informal approach.

Through monitoring (which includes the validation of data from the files against the EOIS-CaMS system), MTCU can determine how effectively SPs are performing based on their targeted commitments as well as against the provincial standard and can provide support and feedback related to SP outcomes and activities.

Although the monitor completed by MTCU may include financial aspects, it is not the same as a financial audit (see "Audit and Accountability Requirements for Service Providers" document for more information).

## LBS Monitoring

All LBS agreements are subject to monitoring of expenditures, activities and results. Through monitoring, the Ministry can determine how effectively service delivery sites are performing based on their targeted commitments, as well as against the provincial standards and the requirements outlined in the LBS Service Provider Guidelines. Monitoring can provide support and feedback related to the service delivery site's outcomes and activities. Evidence of continuous improvement to organizational capacity and performance is a key aspect of monitoring.

Monitoring is conducted throughout the duration of the agreement through a combination of 'off site' and 'on site' activities.

During the agreement period, events may occur that will result in additional monitoring.

There are two kinds of visits conducted by MTCU:

1. **Program Monitoring Visit:** This is a comprehensive review of an LBS delivery organization's administrative and financial systems as well as LBS services. Conducted by an MTCU Consultant, a program monitoring visit results in a Feedback Report which is sent to the LBS organization and maintained by MTCU as part of the documentation on the organization.

It is expected that every service delivery site will undergo a full on-site monitoring visit annually i.e. at least once per agreement cycle.

2. **Program Support Visit:** This visit is conducted to check an organization's progress towards action items identified at the program monitoring visit as well as provide support and guidance to those organizations not meeting program requirements. A letter summarizing the results of the visit is sent to the organization.

## Evaluation for Continuous Improvement

Evaluation of the LBS Program is a participatory and continuous process that includes input from all stakeholders, including clients and learners, staff, referring organizations, community partners, funders and goal path stakeholders. Evidence of continuous improvement to organizational capacity and performance is a key aspect of evaluation.

As a good business practice, LBS service providers should develop an internal agency evaluation system that includes:

- Monitoring and evaluation systems to ensure LBS Program activities and outcomes are consistent with those specified in the contract and the LBS Program Guidelines;
- Management review of learner files;
- Method for gathering other service delivery organization and stakeholder input and feedback; and
- Method for gathering learner input and feedback.

# Employment Ontario Literacy and Basic Skills Performance Management System for Service Providers and Support Organizations



## Summary

## Summary

It is important to remember that this one day of training is just the beginning of the learning process for SPs and SOs to truly understand the LBS Performance Management System. While the training provided a high-level overview of the LMS PMS concepts, this manual contains more detailed information. Managers and Executive Directors are encouraged to use this material, along with other resources such as the LBS Guidelines and documents on the EOPG website, to train their teams and to continue to develop organizational capacity “below the waterline” which includes:

- Achieving contracted commitments;
- Integrating continuous improvement into the fabric of the organization; and
- Collecting valid and reliable site-level data to support solid business decisions.

It is expected at this time that SPs and SOs have a deeper level of understanding regarding:

- The LBS PMS and how it contributes to service quality excellence and a sustainable LBS service that makes a real difference for individuals and communities in Ontario.
- The Performance Management Framework including the 3 dimensions of service quality, the 7 core measures and the Service Quality Standard; Service Provider Capacity; and Compliance with the LBS agreement and guidelines.
- Business Intelligence including the connection between the OALCF, the raw data entered into CaMS and service provider performance measurement and management; the importance of service and data integrity; service provider responsibilities; and EOIS-CaMS reports.



- Continuous Improvement including the EO continuous improvement process; the MTCU annual business planning cycle; the Quarterly Status and Adjustment Report (QSAR); internal service provider operational planning; and ongoing data analysis
- The EOPG resources available related to the above.



## Exercise: LBS PMS

Choose one to three words to describe where you are “at” right now?

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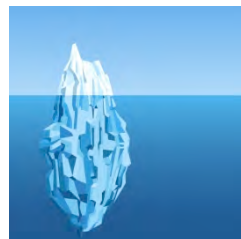
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## Below the Waterline Opportunity: Next Steps



Now that you have been trained, it is expected that you will take this information back to your SP or SO and train those in your organization who are either responsible for the integrity and the analysis of your EOIS-CaMS data or for supporting SPs to build organizational capacity. 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		
Complete the “primary customers” exercise		
Compare the client/learner service pathway in this manual to the SP pathway to determine gaps, if applicable		
Review the SP Schedule E with team members and highlight the importance of data integrity		
Complete the “core measures” exercise and discuss Phase I and Phase II core measures		
Complete the QSAR exercises on pages Unit 4, pages 13 & 14		

# Employment Ontario Literacy and Basic Skills Performance Management System for Service Providers and Support Organizations

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## Appendix 1: Data Entry Tool for LBS Service Providers

# Employment Ontario Literacy and Basic Skills Performance Management System for Service Providers and Support Organizations

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## Appendix 2: User Guide Detailed Service Quality Report (64)

# Employment Ontario Literacy and Basic Skills Performance Management System for Service Providers and Support Organizations



## Appendix 3: Detailed Service Quality Report (64)