

# The Literacy Link – Supporting you through change

April 2013



## Performance Management Support

Literacy Link South Central is committed to providing performance management assistance to LBS service providers. Through this newsletter, LLSC will share tools and resources gathered from our partners around the province that can be used to impact your organization's performance management. If there are specific topics you would like to see in upcoming issues, please contact Literacy Link South Central at [literacylink@gmail.com](mailto:literacylink@gmail.com)

## Performance Management: Where do we go from here?

### Learning from Literacy Link South Central's March 19<sup>th</sup> workshop

On March 19, 2013, Literacy Link South Central welcomed over 40 representatives from LBS agencies to a day of professional development training. After a morning spent dissecting literacy and numeracy tasks into OALCF competencies and complexity levels, participants spent an afternoon discussing Performance Management issues. Having identified common questions and/or concerns about Performance Management as a group, the session broke participants into discussion groups.

With each group focused on a specific topic, participants looked at current Performance Management practices and discussed how to best manage performance within Literacy and Basic Skills programs, especially as it relates to data entry and reporting in EOIS CaMS. We're happy to share the results of those conversations in this issue of our Performance Management newsletter.

### Discussion group / breakout sessions covered the following topics:

1. Efficiency: Learners Served
2. Referrals
3. Learning Activities: Completion
4. Entry to Exit

Each breakout session had an assigned note-taker, who recorded the flow of discussion and shared it with all attendees at the end of the session. Their notes are summarized in the following pages.

## Efficiency: Learners served

- The group outlined the fact that Ministry sets targets for each program. An annual target of (ex) 120 learners is divided by month, so when programs get their monthly reports they will show a % of goal based on their total learners served in relation to the monthly average. In the example of 120, an agency who has served 18 clients at the end of the second month of measuring would show at 90% of goal.
- There was a discussion around how learners are counted, and that once they are, they stay in the system (the “learners served” is a cumulative total). A note was made that they must be both open and active in order for them to count (must have an associated milestone)
- The question of what to do when an agency has a group of learners that will be with them for a long time? Not having a big, bulky service plan is helpful. Break the overall plan into more manageable pieces, which helps to achieve milestones for the client, even if the agency is not exiting them. Idea: when registering the client the agency could identify a goal that’s really only 1/3 of the way to where the learner really needs to be. Then redo it for the next third. It’s a great way to show progress
- The group expressed concern over how to capture all the information that is needed in CaMS - some organizations are creating their own forms to track the information that’s required, having the client sign the changes and updates as they are made, and then getting a data entry person to enter the information to EOIS CaMS. It was agreed that it takes more time to manage a client from an administrative perspective if you do the above. While it’s more of an effort, the group can see benefits of that process as well
- On service provider reported that there’s sometimes a discrepancy between “max efficiencies” and the ability to actually provide service. For example, having seats for only 10 learners at a time and a goal of serving 25 per year, when none of the program’s 10 clients will leave the program to make room for more learners
- MTCU suggested celebrating what each agency does well - take a challenge (ex. long-term learners) and look at the bright side of it (at least you have committed learners, which can be hard to come by) then build from there. Know that there are some things that can’t change, but promote the good you can do. Ties in with the shorter-term goals, milestones, instead of the larger learner plan (as discussed in the earlier point)
- MTCU representatives did mention that if organizations can’t make their targets, then their targets can be lowered... but their funding will be lowered as well
- Program staff raised the issue of additional one-time funding that was given with the understanding that your capacity increased as a result. It did – then the funding was removed, and the expectation of the number of clients you would serve didn’t get pared back accordingly. There is frustration around this subject at many agencies
- Referrals in-and-out (see the discussion highlighted in the next breakout session) ties in well with this subject. There are challenges getting referrals, especially in smaller towns
- Agencies and MTCU representatives alike identify issues with CaMS, which are hopefully improving over time. The suggestion is to keep working with the system – it will get better.

That said, in addition to the challenges of learning to understand the way the system is built, there are also crashes. March 31<sup>st</sup> is a long weekend, and the last week of the fiscal year-end as well – be prepared for delays and possible system outages. Fridays and month-ends are often a problem for CaMS as is the time period when certain reports are generated in the system, and everyone is trying to access it at the same time. Programs are advised to give themselves lots of leeway in time to work in the system.

- The group discussed the division of learning support for clients on OW vs. those on EI - Clients on OW get support for education, but if they're on EI, they don't get the same support – they get support for employment. This is a good opportunity to build up the relationship between Employment and LBS – it would be good to see clients who need educational support who are on EI have a stronger tie to upgrading
- EO will be using SaMS, which is essentially CaMS packaged a bit differently... right now, multiple organizations can see client information, and that number will only be growing from now on
- There was a discussion around a revisiting of number of learners served - apparently a couple of years ago programs were allowed to update or adjust the number of learners in conjunction with the roll-out of CaMS and an increase in funding that was being released
- Our MTCU representatives suggested that if Ontario & Western Region are at 60% of learners served, having programs report at 60% of learners served also makes sense
- There was a discussion around the weighting of measurables – the effectiveness and customer service vs. the number of learners served
- The group raised the question “are all referrals equal?” (ex. Are referrals to counselling service weighted greater than or less than referral to a credit course?) The group, with our MTCU representatives guidance agreed that no they aren't, especially as referrals from one LBS to another LBS are not counted. Most other referrals “count”, although only one referral counts per client however... it's suggested that programs make sure that if they're doing multiple referrals they put the one into CaMS that “counts”
- MTCU reiterated the importance of looking at EOIS CaMS reports religiously – it's the only way to stay on top of it

## Referrals

- What is a recognized referral? The group discussed that they are really anything the learner needs, but you must follow up with the learner to ensure they made it to the referred agency. Communication and follow-up directly with the client will be the best way to confirm that, although there is value in partnering with employment agencies to share information about join clients. It can also help avoid duplication of services
- Group members shared tools that they've developed to help track referrals at the agency level (ex. a referral “passport”, checklists, master chart showing referrals, etc.). The passport is filled out by the learner and reflects the competencies of “engage with others” and

“manage learning” – it’s signed by the agency receiving the referral, and reviewed by the original agency

- Useful or appropriate referrals can often be identified during the intake process (food bank, Clothing Works, counselling or employment services, legal, etc.)
- There are challenges with referrals in rural areas
- The Service Coordination category (for referrals) is only counted once per client, regardless of the number of referrals actually made. That said, it’s requested that all referrals be recorded anyway, to ensure that clients aren’t referred multiple times to the same place, and so MTCU can get a better sense of the referrals happening. This helps inform MTCU of the barriers that clients are typically dealing with
- It might be helpful to survey class needs once a year to find out what services learners want, use, and need. A good example of how that information can be used at the program level was when LLSC asked which bus routes served programs in the area – one service provider turned that question into an activity for learners, tying it back to the competencies
- An advantage LBS has is that multiple service plans can be open in EOIS-CaMS, so you can work in partnership with other agencies serving the same client
- LBS agencies report verbally that they’re doing referrals, but those referrals aren’t all being captured in EOIS-CaMS
- MTCU suggests that agencies refer to the LBS EOIS CaMS report to keep track of what’s current (the guidelines were released in Jan 2013)

### **Learning activities (completions)**

- The group discussed the fact there that is not a definition for the term “learning activities”. They are not mentioned in the Curriculum Framework. They felt it would be helpful to have a common definition for learning activities. It was confirmed that the term learning activities is also not defined in the official glossary
- Some group members interpret learning activities as tasks, some as skills.
- The group discussed whether at exit, when you indicate if the learner completed all the learning activities, milestones and culminating tasks were included. It was pointed out that you report on milestones and culminating tasks separately and therefore this field just refers to learning activities
- The group discussed the fact that you cannot record all of the learning activities and that you need to be able to manage the amount of data you have to/are able to input into EOIS-CaMS. It was suggested that you group or chunk activities to record. One program records about one activity per week, another one per month
- If a more standard program is being delivered it is easier to identify the learning activities ahead of time. For many learners, however, the activities are identified just in time (and entered into CaMS just in time) to address changing learner needs. Learning activities change!

- The group discussed the fact that the amount of paperwork is taking over and cutting into the amount of quality “teaching” time
- The group discussed the fact that the learning activities usually have to be recorded as “custom basic plan item” which allows you to actually type in what the activity is. The group felt that only a small amount of detail was reasonable given how time consuming the data entry is
- The group discussed the use of a two file system - one file for the official ministry paperwork which needs to be kept locked up (PRF, initial assessment documentation, referral documentation, Learner Plan, completed milestones and culminating tasks, EXIT) and one for the learner to keep their work and other evidence of progress
- The group discussed the challenge of constantly updating the LPT and how they are handling this. Many agencies are updating by hand as updating electronically and reprinting is not feasible from a time perspective or a financial perspective
- The group discussed the challenges associated with administering the culminating tasks. For example, budgeting as a culminating task is not necessarily a great activity for someone on an income so low a budget isn't feasible. It also doesn't make sense for someone with a goal of independence unrelated to budgeting. The group noted that when you look at the Ontario statistics, only 15% of people exiting have completed a culminating task. This appears to be a province wide challenge

## Entry to exit

- The group discussed how reports use different terminology (ex. there's a reference to “plan items” but not learning activities.) Different programs have different ideas of what learning activities are – they're not really clear on what to fill in on Learning Activities, how many to enter, or how often to update
- It was clarified that there's no information available as of yet re: the funding model
- The group discussed whether culminating tasks, milestones and learning activities are all equally weighted
- Practitioners agreed that they don't have enough time to do all the documentation for learners from entry to exit. It was agreed that it would be good for programs to know how much time they're spending on specific tasks
- The question of where do the learners who used to be classified as “Left after Assessment” get recorded now was raised, and no answer was agreed on
- Practitioners would like to look at EOIS-CaMS collaboratively so they can understand it better and get credit for the work that they do, and the group agreed that it would also be good for programs to know what MTCU looks at in terms of data so they can better understand what MTCU is looking for when they do program visits
- There was a discussion about files that haven't been entered into EOIS-CaMS – how are programs handling these individuals? Should there be consistency?

- There was also discussion about the treatment of milestones and the challenges of balancing access to learner files while protecting the milestones themselves (some programs are keeping two sets of client files)
- The group discussed culminating tasks – some programs are using them, some are not. Some are finding challenges with them, and others find their learners are quite excited to use them. We discussed how the integration of milestones and culminating tasks could be used to inform program design. Programs wondered if the culminating tasks would become, or perhaps already are, optional
- The group discussed some of the support documentation that's been created. Programs reported positively on Becky Barber's work around self-assessments and Escargo. They agreed that this would be a good training activity for the future
- Programs would like a session on how to manage learning activities within EOIS-OCaMS and how to manage/organize learning activities into learning modules. They're interested in discussing how to fill in the learner plan – it may also be worthwhile to do a session on Learner Gains Assessment, depending on what training MTCU offers on the topic
- Some community-based programs reported that they are becoming less dependent on paper resources and more reliant on technology. Some practitioners noted that they are mandated to find out the best learning style for learners, but practitioner learning styles don't seem to be taken into account during their training
- Programs overall reported that they would like more structure, but what would structure look like? We certainly have enough frameworks – do practitioners actually want to be more confident in what they're doing?
- The group agreed that there are no outlets for practitioners to discuss issues and challenges with each other online – practitioners miss AlphaCom
- The group debated what the plan items will be, will there be a bank of items to draw from, how to prove they've been achieved, etc.
- The question was raised of how much time is spent by a service provider per client – how much time does it actually take?
- The group would like a better understanding what numbers are being counted in CaMS and which aren't, and how that might effect reporting, especially because of the number of learners served
- The group discussed the importance of triaging the client – knowing the most important things to track in EIOS CaMS to get them started on the right path quickly
- The group would like to know what MTCU looks at when they come for a program monitoring review. They would like to bring that set of expectations / guidelines in line with what LBS agencies track and monitor themselves
- The group discussed the pros and cons of entering clients into CaMS when you're not sure if they're going to be a long-term
- It was agreed that more training on interpreting the reports from CaMS would be appreciated

- The group also agreed that they would like some training on the Learner Gains Assessment, and it would also be good to have better resources for programs to discuss and share with each other to help brainstorm issues
- The discussion wrapped up with a look at the logistics of implementing performance management systems

## Discovering similar issues

As we can see from the recorded notes, there were consistent questions and concerns raised by participants regardless of what topic they were specifically discussing. Across several groups the fact that only one referral “counts” per client in EOIS CaMS, and that LBS cross-referrals don’t “count” at all was shared. Participants were interested to learn that many of them are keeping two sets of client files as they attempt to manage the information and time required for EOIS CaMS. A final consistent message – participants frequently commented on the need for additional training and discussion opportunities such as this one, to help everyone realize that they’re not alone in their performance management challenges and successes.

## Participant feedback

Following the training session, participants were given the opportunity to share their feedback. 85.2% of attendees reported that they understood the system of Performance Management within Literacy and Basic Skills better following the session. When asked what additional information or tools they would need to manage organizational performance, responses ranged from more opportunities for group sharing and discussion to requests for step-by-step processes by which to complete work plans and forms, along with sample files and forms completed to the standard MTCU expects. Those requests and suggestions will be referenced as future professional development opportunities are designed.

## Conclusion

Literacy Link would like to thank everyone who attended the March 19<sup>th</sup> training session for their input, and to thank Robyn Cook-Richie for facilitating that day’s Performance Management discussion.

Questions about this newsletter? Please contact us at 519-681-7307 or [literacylink@gmail.com](mailto:literacylink@gmail.com)

