

The Literacy Link – Supporting you through change

August 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 positively 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

Analyzing Data from EOIS CaMS

Learning from Literacy Link South Central's EOIS CaMS Round Table

Following a recent workshop where attendees dissected literacy and numeracy tasks into OALCF competencies and complexity levels, we received clear feedback that participants hoped for additional opportunities for training and discussion. With that in mind, on June 17, 2013, Literacy Link South Central hosted a Round Table. The goal of this Round Table was to give practitioners an opportunity to identify best practices and common challenges around EOIS CaMS data entry and management. What resulted was an open forum that allowed practitioners to brainstorm solutions to their most frequent EOIS CaMS data management concerns.

Topics of discussion

Having requested input in advance, attendees suggested several topics of discussion which were put on the agenda. As with many brainstorming sessions, conversation wove its way intuitively through several topics, as outlined below:

- Streamlining 3-6-12 month follow-up contacts
- Manipulating reports
- Keeping client files active
- The Learner Plan Template
- Data integrity
- Client tracking
- Report 64 - achieving maximum results

Streamlining 3-6-12 month follow-up contacts

Challenge	Discussion	Going forward
Having to contact the client at 6 & 12 months even though they were unreachable at the 3-month mark.	<ul style="list-style-type: none"> Such contacts are seldom successful. Would CaMS let users enter a future date, recording a contact failure 3 months from now? It is believed not. 	<ul style="list-style-type: none"> Use CaMS reports to keep on top of who is due for contact Make a note of where the client is going after leaving your program to help make contact with them later.
Managing the number of attempts to reach the client, and the number of potential contact numbers, while not “harassing” clients.	<ul style="list-style-type: none"> Programs are using all available contact information including their emergency contact numbers. Practitioners are spending considerable time trying to track down clients that don’t want to be found. 	<ul style="list-style-type: none"> Set the client’s expectation that you’ll be calling them at all the numbers you have on file the 3, 6 and 12-month mark. Consider a policy identifying the maximum number of phone call attempts you will make. Consider setting a program goal for the number of successful vs. lost contacts for the 3, 6 and 12-month follow-ups.
Not being able to reach the client directly, but getting information about the client from someone they know.	<ul style="list-style-type: none"> Is information from a client’s friend or family (casually, or during attempts to reach the client at the 3-6-12 month mark) considered a reliable source? What’s better: having lost contact with the client, or having some information recorded at the 3-6-12, even though it’s not directly from the client? 	<ul style="list-style-type: none"> This sort of information is not considered reliable – the client could have had a falling-out with the person you’re speaking with, someone may not be honest about what the client is doing, etc.
Not being able to reach the client directly, but getting information about the client through records in another system (e.g. seeing that they’ve registered for a class at the local college).	<ul style="list-style-type: none"> Permission from the client would be required to access and use their information. We must maintain full confidentiality of information from system-to-system. 	<ul style="list-style-type: none"> Try to contact the client at the organization/school that you know they’ve become associated with to complete the contact effectively. Check your organization’s consent and release forms to see if they could be revised to include a broader definition of the other organizations that information can be shared with.

Manipulating reports

Challenge	Discussion	Going forward
Having to view information that isn't relevant to what the user is looking for in CaMS	<ul style="list-style-type: none">• Is it possible to change the view in CaMS?• Practitioners would like to manipulate CaMS so reports could be pulled based on the specific criteria (e.g. a geographical report sorted by postal code).	<ul style="list-style-type: none">• At this time neither option is available.• As some of the reports are in Excel, it's possible to sort the reports by any of the criteria contained within, so for example, report 32A could be sorted by postal code, determining geographical areas.• Feedback about the reports desired can be sent to the developers via your ETC.

Keeping client files active

Challenge	Discussion	Going forward
How to keep client files active if it takes a long time for clients to complete milestones.	<ul style="list-style-type: none">• Suggestions include updating the Learner Plan with learning activities, although there are concerns that the client can end up with dozens of learning activities that are hard to sort through.	<ul style="list-style-type: none">• To keep the client active, you must create and update Learner Plans.• It was noted that this reinforces the earlier request to be able to change the view in CaMS so you can hide all the closed activities and only view the open ones.• Please share the above request with the CaMS development team via your ETC so changes can be made in the future.

The Learner Plan Template

Challenge	Discussion	Going forward
Using and recording a variety of activities from various sources as learning activities for the client.	<ul style="list-style-type: none">• It is anticipated that the Learner Plan Template will be printable from CaMS for the client, as several sites are participating in a pilot project where that functionality is available.	<ul style="list-style-type: none">• Task-based activities and materials can be used to support the client, and they can be recorded on the Learner Plan Template as well as entered in CaMS.

Challenge	Discussion	Going forward
Constant updating of the Learner Plan Template.	<ul style="list-style-type: none"> • Some organizations keep two different learner plans: one internal, one for MTCU. • Larger organizations often build administration time into the program. • Some organizations have a data-entry person. • Another creates a Learner Plan Template upon intake, and then updates it manually along the way, highlighting the items on the Plan that have been entered in CaMS (done when time is available). 	<ul style="list-style-type: none"> • Use whichever suggestion in the discussion column works best for your organization. If you have other suggestions, please share them with LLSC and we will disseminate to other programs. • A pilot test of new functionality that allows information added to the Learner Plan Template (in Word) to auto-populate into CaMS and vice versa is being run now.

Data Integrity

Challenge	Discussion	Going forward
Should every piece of information that appears in the client's file appear in CaMS, and vice-versa?	<ul style="list-style-type: none"> • ETCs will audit closed files to ensure that all that information is included. • Programs can do their own audits with a checklist of what should be included • This year, even open files may be audited, so it's best to put a plan in place to ensure that the all required information is included 	<ul style="list-style-type: none"> • Anything that was entered in CaMS must appear in the client's file in hard copy • The checklist being used by one organization is being distributed along with this PMF newsletter

Client Tracking

Challenge	Discussion	Going forward
The timing of when the client fills out the 3-page registration form	<ul style="list-style-type: none"> • Programs are concerned about putting people into CaMS as a client only to have them disappear, causing the need for follow-up without an established relationship. 	<ul style="list-style-type: none"> • Some programs think you need to have the registration form completed before the Learner Plan is done, and other programs think you have to do the Learner Plan before the registration form is complete. Please contact your ETC for confirmation of the correct procedure for your site.

Report 64 - achieving maximum results

Following the round table discussion, a Detailed Service Quality Comparison handout was reviewed, and the group spoke about comparing local programs stats to what is being achieved at the provincial level. Two statistics-based conversations arose from reviewing the handout:

- Percentage of learners who have completed culminating tasks - learners can refuse to do them but programs are rated on how many learners complete them. There is some question of whether they will become mandatory in the future.
- Target numbers – only 60% of the target # of learners was met across the Province, and 64% in the Region. How is that reflective of what’s happening at the program level? It’s challenging as those clients who used to be counted as “learners served” don’t count as learners served in CaMS, yet the target number wasn't dropped – it’s possible that a program completing the exact same activities with the exact same number of clients will appear as though their client # has dropped.

Moving forward

Round table sessions such as this are a great way to share the skills each LBS practitioner has to analyze data from CaMS. LLSC welcomes your feedback on how we can support programs in their ongoing CaMS journey - please talk to your ETC about any questions that you need clarified, and email Literacy Link with requests and suggestions as well.

Conclusion

Literacy Link would like to thank everyone who attended the EOIS CaMS Roundtable for sharing their thoughts and experiences, and to thank Robyn Cook-Ritchie for facilitating the discussion.



Questions about this newsletter? Please contact us at 519-681-7307 or literacylink@gamail.com