Evaluation of the Literacy and Basic Skills (LBS) Program

Final Report

for the Ministry of Advanced Education and Skills Development

November, 2016

Cathexis

Table of contents

Acknowledgements

The project team wishes to thank everyone who contributed their time, effort, and expertise to this evaluation. We are especially grateful to:

- The service providers, support organizations, community partners, and learners who participated in consultations. The time they spent with us to explain how the program operates on the ground was invaluable.

- The evaluation working group that provided insights during the planning and reporting phases of the evaluation.

- The lead evaluation staff at the Ministry of Advanced Education and Skills Development, Liliya Volovik, Jasur Teshaev and Sarah Niles. Their leadership and dedication to useful evaluations were appreciated.

Report guide

Overall organization

This report begins with an introduction that describes the program and the evaluation. It is followed by the findings, which are organized by evaluation question (please see subsection 1.2 for a list of the evaluation questions). The report concludes with conclusions and recommendations. The appendices include three case studies that focus on key evaluation issues.

Referencing systems

The **following acronyms**, in superscript, have been used to indicate data sources:

- **AD:** Administrative data
- **CPI:** Community partner interviews
- **CV:** Consultation visits
- **IJ:** Interjurisdictional scan
- **LDG:** Learner discussion groups and interviews
- **LS:** Learner survey
- **MI:** Ministry staff interviews
- **SOI:** Support organization interviews
- **SPI:** Service provider interviews
- **SPS:** Service provider survey

As well, the **following definitions** have been applied to both qualitative and quantitative data:

- **All:** Reflects the opinions of 100% of respondents.
- **Majority/Most:** Reflects the opinions of at least 75% but less than 100% of respondents.
- **Many:** Reflects the opinions of at least 50% but less than 75% of respondents.
- **Some:** Reflects the opinions of at least 25% but less than 50% of respondents.
- **A few:** Reflects the opinions of at least two respondents but less than 25% of respondents.

1 Introduction

This evaluation of Ontario's Literacy and Basic Skills (LBS) program assesses the program's **relevance**, **delivery**, **effectiveness,** and **efficiency** between April 2012 and March 2016. The evaluation is meant to inform policy and program decisions about literacy and essential skills training in the context of the Transformation of Employment and Training Services, formerly known as Employment and Training Services Integration.

1.1 Program profile

Program objectives

Ontario's LBS program provides free training to adults in reading, writing, and math skills in order to achieve their goals. It is designed for people whose skills are below Grade 12 level.

Coordinated and funded by the Ministry of Advanced Education and Skills Development (MAESD)[1], the LBS program is delivered by 274 service delivery sites across the province (at the time of the evaluation). Community agencies, colleges, and school boards deliver the program through the Employment Ontario (EO) service delivery system.

The objectives of the program are to:

- **provide high-quality instruction and services** to adults who lack the literacy and basic skills they need to achieve goals related to employment, apprenticeship, postsecondary education, secondary school credit, and independence;

- provide learners with **appropriate referrals** to additional supports;

- **coordinate literacy and other services** to help move Ontario toward a seamless adult education and training system;

- provide literacy services to **those most in need** of them; and

- ensure accountability to all stakeholders by providing literacy services that are effective and efficient.[2]

---

[1] Formerly known as the Ministry of Training, Colleges and Universities.

[2] MAESD. (2015). 2015-2016 LBS program: Business plan service provider site instructions.

Service delivery and development

Service delivery

Service delivery is the main function of the program. The five service delivery functions available through the LBS are:

- information and referral,
- assessment,
- Learner Plan development,
- training, and
- exit and follow-up.

37, 294 in-person learners

5, 587 e-Channel learners

↑ Blended learners
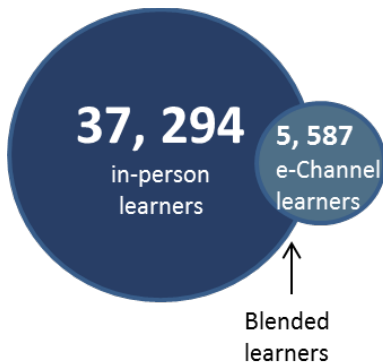
The **majority of LBS learners access services in person**. Training may involve one-on-one tutoring, structured courses, or unstructured classes and independent study. On average, in-person learners spend about 360 hours in LBS training over an eight month period; this ranges from less than a week to three and a half years.[AD]

Learners may also access **online learning,** in addition to in-person training, or separately, through one of the five LBS e-Channel providers. Learners who access both in-person and online learning are known as blended learners.

LBS in-person learners by stream 2014-15

Aboriginal 1, 233

Francophone 2, 896

Deaf 317

Anglophone 32, 847

Service providers are grouped into **three service delivery sectors**: College, School Board, and Community Agency. They operate in one of **four cultural service streams**: Anglophone, Francophone, Aboriginal, and Deaf.

LBS in-person learners by sector 2014-15

College 15, 570

Community Agency 11, 439

School Board 10, 043
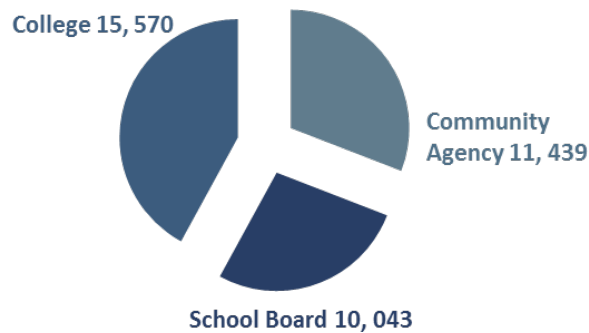
Service development

Service development activities support the delivery of the LBS program. These activities are provided by support organizations, which help service providers to achieve the objectives of the LBS program. They undertake activities in four service categories:

1. Support seamless client pathways across EO and other departments.

2. Support quality service delivery by providing resource development and support.

3. Support the improvement of service provider organizational capacity.

4. Support the collection and distribution of research findings and contribute to regional, sector, or stream perspectives to LBS-related research projects.[3]

The 27 support organizations have mandates that are organized by sector, stream, catchment area, and service.[4] They are comprised of:

- three **sector** support organizations (College, School Board, and Community Agency);

- three **stream** support organizations (Aboriginal, Francophone, and Deaf);

- 16 **regional networks** (each of which serves a regional catchment area); and

- five **other** support organizations (including publishing and technical support organizations and Laubach Literacy Ontario).[5]

---

[3] MAESD. (2016). LBS: Support organization program guidelines.

[4] MAESD. (2016). LBS: Support organization program guidelines.
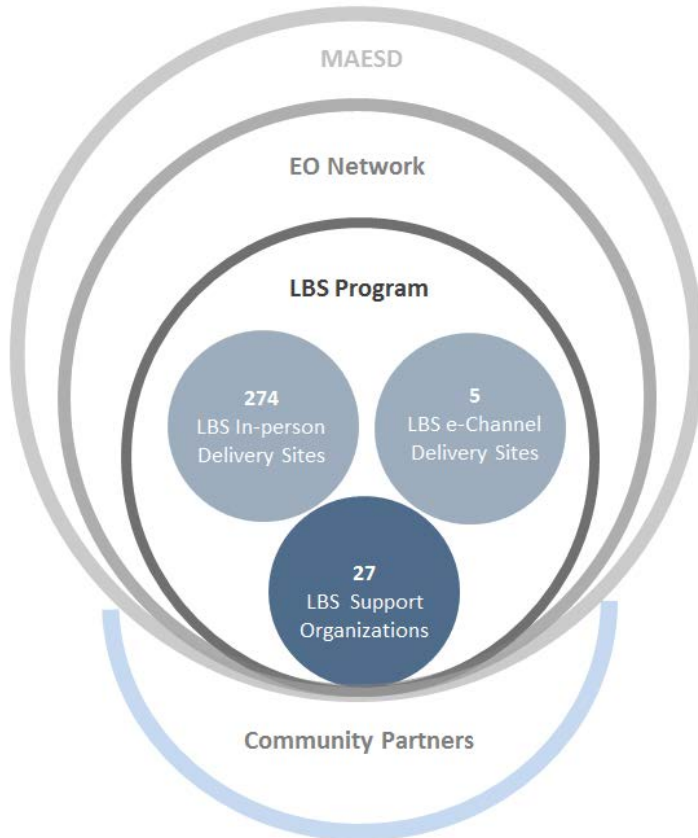
The LBS network

The LBS network and its players are depicted to the right.

The Ontario Adult Literacy Curriculum Framework (OALCF)

The OALCF was introduced to the service delivery network in 2011 and incorporated into service delivery starting in April 2012. It is an **organizing framework that is competency-based, learner centred, and transition oriented.**

Six **competencies** are described in the OALCF:

- find and use information,
- communicate ideas and information,
- understand and use numbers,

---

[5] MAESD. (2016). LBS expenditures for support organizations 2014-15 to 2015-16 spreadsheet.

- use digital technology,
- manage learning, and
- engage with others.

While the LBS program's former learner outcomes assessment framework had five levels (LBS Levels 1-5) based on **skill** levels, the OALCF has three levels, corresponding to the Essential Skills levels, based on mastery of **tasks**. The task-based approach was adopted to better enable learners to transfer their learning to authentic situations.[6]

The five **goal paths** in the OALCF are:

- transition to independence,
- transition to employment,
- transition to secondary school credit,
- transition to postsecondary, and
- transition to apprenticeship.

The OALCF defines exit standards to make the transition from one or more of the pathways. It is not a curriculum in the traditional K-12 sense but rather an articulation of a set of competencies.

Milestones are completed by learners to demonstrate progress towards completing their goals and making a transition beyond the LBS program. These progress indicators are goal-related assessment activities. The tasks are chosen by the learner and practitioner to ensure that the tasks are meaningful and appropriate given the learner's literacy skills and goals.

Culminating Tasks are undertaken at the end of a learner's progress towards their goal. They draw together multiple competencies that may be at different levels of complexity. Successful completion of Culminating Tasks is a demonstration of the learner's ability to manage tasks beyond the LBS program.

The final core component of the OALCF is **learner supports and service coordination**. Learners may need a variety of supports including financial, academic, employment, social service, and health. Practitioners work with learners to identify the necessary supports through a variety of means including assessment tools and building trusting relationships with the learners.[7]

---

[6] MAESD. (2011). Curriculum framework;

[7] MAESD. (2011). Supporting learners through service coordination and referrals.

1.2 Purpose of the evaluation

This evaluation is meant to inform policy and program decisions about literacy and essential skills training in the context the Transformation of Employment and Training Services, formerly known as Employment and Training Services Integration. It assesses the program's **relevance**, **delivery**, **effectiveness,** and **efficiency**.

The specific evaluation questions that guided the evaluation are the following:

Relevance

1. How relevant is the LBS program to the needs of learners?

2. How well does the LBS program align with community and government priorities?

Program delivery

3. How well does the LBS program determine and address the needs of local communities?

4. How well does the OALCF support effective program development and delivery?

5. Have service providers implemented and delivered LBS service delivery functions in accordance with the OALCF guidelines?

6. How viable is e-Channel as a way of providing high-quality LBS programming?

7. How effectively do LBS support organizations conduct LBS service development and support OALCF implementation?

Effectiveness

8. To what extent is the program achieving or demonstrating progress towards intended participant outcomes?

Efficiency

9. To what extent is LBS being delivered in an effective and efficient manner?

10. How well is the Performance Management Framework (PMF) supporting business intelligence and continuous improvement?

11. How effective are the Ministry's current support and funding structures?

1.3 Evaluation methodology

This evaluation relied on multiple methods:

- Administrative data (about learners)

- Consultation visits with service providers (17)

- Discussion groups with learners (11)

- Inter-jurisdictional scan

- Learner survey (1,519)

- Service provider interviews (10)

- Community partner interviews (26)

- Support organization interviews (25)

- Ministry interviews (12)

- Service provider survey (244)

Administrative data

The administrative data about learners was obtained from EOIS-CaMS for in-person learners and from a temporary supplementary Excel database for e-Channel learners.

The evaluation includes learners who were in LBS between April 1, 2012 and March 31, 2014.

This administrative data was reviewed for reliability and integrity prior to its use for this evaluation.

Consultation visits with service providers

The consultation visits collected information from service providers about alignment with the OALCF, what is working well, and challenges.

In total, 13 consultation visits with in-person providers and four consultation visits with e-Channel providers were conducted. The visits were one to two days in length and occurred in February and March 2016. No Ministry staff were present.[8] The visits included staff interviews, activity observation, and document review.

To select sites for consultation visits, stratified random sampling was conducted based on region, sector, stream, and size, along with prioritization for five sites that were in close

[8] A preliminary training process that included a visit to multiple sites in Hamilton, Ontario included both Ministry and Cathexis staff. The purpose of this process was for the evaluators to gain a better understanding of the program. It was not a consultation visit.

proximity to evaluation team members to encourage efficiencies. Visits were conducted with providers representing all streams, sectors and regions.

Discussion groups with current learners

Discussion groups obtained information from current learners about their experiences, with a focus on what they have done, whether/how it is making a difference, and what is working well and not working well.

In total, 11 discussion groups[9] took place in February and March 2016 at nine different service provider sites (all of which also participated in consultation visits). With the exception of Aboriginal learners, learners represented all streams, sectors and regions. On average, six learners participated in each group. Learners self-selected based on interest in participating.

Inter-jurisdictional scan

The inter-jurisdictional scan provided a point of comparison for evaluating the effectiveness and efficiency of the LBS program. The scan built on the scan prepared for the 2011 LBS evaluation.

The following 10 jurisdictions included:

- **Canada (5):** British Columbia, Alberta, Saskatchewan, Manitoba, Nova Scotia
- **United States (2):** Michigan, Massachusetts
- **International (3):** England, Australia, New Zealand

Interviews with community partners

The community partner interviews helped to understand how partners work with LBS service providers and how community needs are identified and met.

In total, 26 partners participated in interviews in January and February 2016. Interviews took place by phone and typically lasted 15 to 30 minutes.

---

[9] One site featured individual interviews with learners in lieu of a discussion group, at the request of the service provider.

Selection of interviewees was done by random stratified sampling based on region and partner type[10].

Interviews with Ministry staff

Interviews with Ministry staff contributed to understanding the program's alignment with government priorities, the alignment of service delivery with the OALCF, perceptions of the program's effectiveness and efficiency, best practices, LBS leadership, reporting requirements, and LBS monitoring and management.

In total, 12 Ministry staff participated in interviews between December 2015 and February 2016. Interviews took place by phone or in person and typically lasted 60 minutes.

Purposeful sampling was done to ensure a range of perspectives. Interviewees included staff representing regional offices (e.g. Service Delivery Managers, Employment and Training Consultants [ETCs]) and policy, program design and development, delivery support (e.g. Analysts, Managers, Directors).

Interviews with service providers

The service provider interviews contributed to understanding the needs of learners, how community needs are identified and responded to, what supports providers are receiving and still need, the impact of key changes, contributors and detractors to efficiency and effectiveness, the accuracy and usefulness of reporting requirements, and the leadership of LBS.

In total, 10 service providers participated in interviews between January and April 2016. Interviews took place by phone and typically lasted 60 minutes.

Stratified random sampling was conducted to ensure that there was participation from each region, sector, and stream. The Deaf stream was purposefully oversampled (four interviewees) in order to collect data to better understand this stream (see Appendix C: Case study on the Deaf stream).

---

[10] Community partners included representation from employment, training and education, social and income support, housing, mental health, immigration and settlement, and labour market adjustment.

Interviews with support organizations

The support organization interviews contributed to understanding the services they offer, how community needs are identified and responded to, the accuracy and usefulness of reporting requirements, and the leadership of LBS.

In total, 25 (out of 27) support organizations participated in interviews in January and February 2016. Interviews took place by phone and typically lasted 60 minutes.

All support organizations were invited to participate.

Survey of past in-person learners

The survey of past in-person learners captured information about perceptions, expectations, experiences, and outcomes related to LBS.

1,154 learners participated. This is close to the target of 1,200 learners and represents an overall response rate of 9.9%. Only a small number of Deaf learners participated; other regions, streams, and sectors are represented.

The survey was primarily conducted by phone. Other methods (e.g. online, American Sign Language [ASL]) were available upon request. The survey took place between January and March 2016.

Participants for the surveys were selected via stratified random sampling. The sample was stratified by region, sector, and stream, with higher targets for Aboriginal, Deaf, and Francophone streams (to ensure sufficient response). The sample pool was restricted to learners who had participated in the program between April 1, 2012 and March 31, 2014; had available contact information; and had closed Learner Plans.

This survey was performed by Leger on behalf of Cathexis.

Survey of past e-Channel learners

The survey of past e-Channel learners captured information about perceptions, expectations, experiences, and outcomes related to e-Channel.

364 learners participated. This exceeded the target of 350 learners and represents an overall response rate of 6.6%. Response rates for learners from ACE Distance and the LearningHUB were higher than response rates for learners from the other three e-Channel providers.

The survey was primarily conducted online. Other methods (e.g. phone, ASL) were available upon request. The survey took place between January and March 2016.

All 5,519 learners who had participated between April 1, 2012 and March 31, 2014 and had available contact information were invited to participate.

This survey was performed by Leger on behalf of Cathexis.

Survey of service providers

The survey of service providers provided information relating to the challenges and successes of delivery, alignment with the OALCF, and the effectiveness of the LBS program.

In total, 244 service providers participated, representing a response rate of 86%.[11] Surveys were completed online in January 2016.

All service providers were invited to participate.

1.4 Evaluation analysis

Where data was qualitative in nature (e.g. interviews, discussion groups), data was imported into NVivo (a qualitative analysis software program) and analysed using a structured coding key. Attributes (e.g. role, region, stream, sector) were assigned to allow comparisons across groups.

Where data was quantitative in nature (e.g. administrative data, surveys), Excel and/or SPSS was used. Appropriate descriptive statistics were run for all continuous (e.g. mean, median, mode, minimum, maximum, range, standard deviation), categorical (e.g. median, mode, frequency tables) and ordinal (e.g. median, mode, frequency tables) data.

1.5 Evaluation strengths and limitations

We have confidence in the overall findings and conclusions of this evaluation.

Key strengths include:

- There was extensive consultation with LBS program stakeholders (learners, service providers, support organizations, and the Ministry).

- Information about learner characteristics and outcomes was available from programs' client information database. A data assessment was undertaken to determine which information was reliable enough for use in the evaluation.

[11] Based on contact information available from the Ministry for 283 service providers.

- Limitations of specific data methods were mitigated by the triangulated approach. Different lines of inquiry converged on similar conclusions, increasing the trustworthiness of results.

- In the few instances where the findings from different sources conflicted, this has been noted in the relevant sections of the report and the resulting limitations have been described.

Key limitations include:

- There was limited consultation with community partners, including employers and educational institutions.

- Only consulted with program participants, therefore, it is not possible to know whether LBS would meet the needs of those who might benefit, but did not participate.

- No comparison group was available for learners, therefore difficult to know if learners' outcomes would have improved without intervention.

- Limited information was gathered regarding how services are delivered. While 17 consultation visits were done (which offered the opportunity to see service delivery first hand), most of this information was self-reported by service providers.

2 How relevant is the LBS program to the needs of learners?

2.1 Introduction

This chapter focuses on whether LBS programming is relevant to learners' needs and goals. It concludes that the LBS program is highly relevant to learners' needs and goals, and that they are satisfied with the services they are receiving. However, the program is serving only a small proportion of all of the Ontarians who could benefit from literacy upgrading.

2.2 There is a need for literacy programming

Ontario's economic plan[12] for an information-driven economy relies on a highly-skilled, adaptable workforce. Premier Wynne has called for **"strategic investments in the talent and skills of our people"** as a means for building future opportunity and security.[13] In her mandate letter to the Ministry, she asked the Minister to focus resources particularly on those who need them most – persons receiving social assistance, persons with disabilities, the long-term unemployed, Aboriginal peoples, newcomers, and at-risk youth – as part of the government's Poverty Reduction Strategy.[14]

Literacy and other basic skills clearly play an important role in this. Strong links have been found between literacy levels and wages, political efficacy, volunteerism, employment, and health. The Organisation for Economic Co-operation and Development (OECD), based on findings from the 2012 international PIAAC survey, concluded that "skills transform lives, generate prosperity and promote social inclusion."[15]

Ontario's PIAAC results[16] indicate that continued effort is needed to strengthen literacy skills in the province. Although about one in six adults in Ontario has very strong skills (Levels 4 and 5), almost half of the population has weak skills (below Level 3). Extrapolating to the population

---

[12] Ontario. Ministry of Finance. (2016). Jobs for today and tomorrow: 2016 Ontario budget.

[13] Wynne, K. (2014). 2014 mandate letter: Training, Colleges and Universities. P. 1

[14] Wynne, K. (2014). 2014 mandate letter: Training, Colleges and Universities.

[15] OECD. (2013). Skilled for life? Key findings from the survey of adult skills. P. 6.

[16] Statistics Canada. (2013). Skills in Canada: First results from the Programme for the International Assessment of Adult Competencies (PIAAC).

of Ontario, over four million adults in Ontario have levels of literacy that could make it difficult for them to participate fully in an information-rich world.

Likewise, recently launched provincial initiatives emphasize the need for improved literacy skills. The Premier's Highly Skilled Workforce Expert Panel puts forth a vision for Ontario's highly skilled workforce. It emphasizes the need for effective skills training and for people to have a "strong foundation in literacy, numeracy, and essential skills, i.e. the skills individuals need to learn, work and adapt in the ever-changing knowledge based economy." [17]   The Ontario Poverty Reduction Strategy recognizes that part of the solution to exiting poverty includes employment and training programs that help Ontarians, particularly those from vulnerable populations, obtain the skills they need to get jobs.[18]

2.3   The LBS learner population is aligned with program objectives

The following infographic provides an overview of LBS learners' characteristics when they first enter the program.[AD] The **LBS program is reaching the learners they are intended to serve, as indicated in the program guidelines**:

The LBS program focuses on adults who reside in Ontario and are unemployed, with special emphasis on people receiving income support. The LBS program is also open to employed Ontarians who need to improve their literacy and basic skills to maintain or upgrade their work skills.[19]

---

[17] Premier's Highly Skilled Workforce Expert Panel. (2016). Building the Workforce of Tomorrow: A Shared Responsibility. P. 10.

[18] Ontario Government. (2016). Moving towards employment and income security.

[19] MAESD. (2016). LBS: Service provider program guidelines. P. 6.

43% **57%**

Age
- 16-18: 3%
- 19-24: 27%
- 25-44: 44%
- 45-64: 22%
- 65+: 4%

84% Canadian citizens

at home
- **English** **85%**
- Other 7%
- French 6%
- Indigenous, Aboriginal or ASL/LSQ <2%

Group identification
- 9% Persons with disabilities
- 7% Aboriginal
- 7% Francophone
- 1% Deaf or deaf-blind

- **49%** have **not completed** high school
- **53%** have **interrupted** education
- **48%** have **been out of school** 6+ years
- **80%** completed most **education in Canada**

Sources of income
- 26% Employment
- 25% OW
- 17% Other
- 11% ODSP
- 9% No income source
- 7% EI
- Dependent of OW/ODSP 3%
- Self-employment 2%
- Crown ward 1%

Employment status (at start of training)
- Unemployed 53%
- Employed 35%
- In school 14%
- Registered apprentice 4%

While the graphic showcases the commonalities between learners (a high proportion are unemployed, have not completed high school, and have a history of interrupted education),

there is also **immense diversity amongst LBS learners**, above and beyond the diversity inherent in the non-Anglophone cultural streams (Deaf, Francophone, Aboriginal). Currently the LBS program does not collect ongoing data on this diversity. The evaluation offered the opportunity to gather examples of this diversity, including:

- learners with developmental disabilities who are described as having very low levels of literacy, but who do not have anywhere else in the community to get support;[CV]

- learners with multiple barriers such as poverty, homelessness, violence, past criminal involvement, Fetal Alcohol Syndrome Disorder, autism and brain injuries, who enter and exit the program frequently, building their skills slowly over time;[CV, LDG, SPI]

- older learners who have retired and are upgrading their skills for personal interest;[LDG]

- learners who want to advance in their careers (e.g. to obtain a management position);[CV]

- learners who were educated in another country and are working towards Canadian credentials;[LDG]

- learners from Mennonite communities who have little formal schooling;[CV]

- learners who attended residential schools and are learning to read in their 40s;[SPI] and

- learners with high levels of skill who need to upgrade in one area or subject.[CV]

> "Four to five months ago, I found out I had a brain injury. I didn't know I had it. [Name of instructor] hasn't pushed me. But I'm not at a pace as other people are. **You have to consider what I have going on.**"
>
> -Learner[LDG]

This diversity also plays out in their goals, skills, and needs. **Learners may want to go back to school, get a job, get a better job, or become more independent in life.[AD]** Learners do not always have a single goal and often speak of multiple aspects of their life that they hope LBS will help improve.[LDG, SPI] In terms of their skills and needs, some learners may enter the program with very low levels of literacy, while others will only need to improve their skills in one area.[CV, SPI] As a result, learners may progress quickly or take a longer period of time to improve their skills as they come and go during their program journey.[CV, SPI, SPS]

For example, learners expressed:

- I'm looking forward to going to college after I get my GED. Looking at this nice car here [refers to photograph], want to supply for my kids. I'm looking to the small business and entrepreneur course that I want to take in the future.[LDG]

- [I want to] improve my English skills because I want to be an airplane mechanic, which requires English as well as math skills. I'll need to read the manuals and communicate with hearing people by email, so I need English reading comprehension and writing for that.[LDG]

Learners' goal paths(n=51,474)[AD]

Goal path	Percentage
Postsecondary	39%
Employment	28%
Secondary	16%
Independence	12%
Apprenticeship	6%
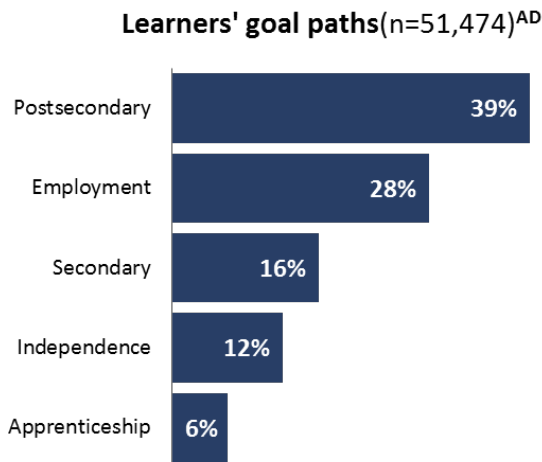
2.4 LBS is meeting the needs of current learners

Learners are highly satisfied with LBS services, and they report that they are getting what they need:

- 89% reported that they are satisfied with the quality of training.[LS]

- 86% indicated that it met their needs.[LS]

- More than 90% (91%[LS], 98%[AD]) of learners would recommend the services to others.

- 90% indicated training activities were relevant to their goals.[LS]

- 87% agreed the amount of learning opportunities received was satisfactory.[LS]

- 87% felt more confident about their next steps.[LS, 20]

---

[20] Learner satisfaction rates may be overestimated. On the learner survey, respondents had high levels of satisfaction across the board, even on items where there were reasons to believe that satisfaction might be lower (e.g. Culminating Tasks). Likewise, the Customer Satisfaction scores recorded in EOIS-CaMS are never fully anonymous (learners are asked about their satisfaction face-to-face by staff with whom the learner has a personal relationship[CV]).

When learners felt their needs were not met (9% of learners), it was commonly because the training was ineffective (it did not help them meet their goal or was not tailored to their needs) or because they did not like particular aspects of the training (such as instructors or classes).[LS]

Learners appreciate the supportive and nonjudgmental approach of LBS staff.[LDG,LS] They also appreciate the program's friendly and enjoyable atmosphere, and the fact that it is free of charge and individualized to each learner.[LDG]

Learners appreciated that, as a result of the program, they are seeing a change in their lives – whether it be an increase in their skills or a gain in self-esteem and confidence.[LDG] LBS offers a "second chance" for learners to succeed. As explained by one learner:

For people like me who fell through the cracks in the regular school system, many years ago, this school has given me a second chance to achieve my goal because it has brought up my self-confidence. Before this, I was always told I was stupid.[LDG]

(For further information related to learner outcomes, please see chapter 8.)

For learners with multiple barriers, such as mental health, substance use issues or homelessness,[21] LBS is intended to support effective referrals and coordination for learners.[22] Over half of learners (54%) surveyed indicated they were connected with another service or support while in LBS.[LS, 23] Of those learners, 43% indicated that they would not be able to attend LBS without these supports, which shows the value of these services.[LS] For further information regarding learner referrals, please see subsection 5.2.

During consultation visits service providers **stressed the importance of tailoring services** to the needs of the individual learner or the learner group that they are serving in order to support transitions.[CV]

However, based on a triangulation of all available evidence (learner survey data, learner discussion groups, Customer Satisfaction scores, and statements by community partners and providers), it can be stated with confidence that learners are generally very satisfied with LBS training.

[21] The LBS program does not does not collect and report data on these multiple barriers so it is not possible to estimate the proportion of learners with multiple barriers.

[22] MAESD. (2016). LBS: Service provider program guidelines.

[23] According to the administrative data, only 15% of learners were referred out.[AD] Referrals out may have been underreported due to misconceptions about what counts as a referral (see chapter 10, which focuses on the PMF) or the administrative burden of data entry (see chapter 9, which focuses on effectiveness and efficiency).

> "The teachers are **very supportive** and **go at my pace**. If I have a question, I get answers within a few minutes."
>
> -Learner[LDG]

The following three composite[24] stories illustrate the diversity of how LBS service providers tailor their services:

Composite example 1

A school board, "Central Ontario School Board" in a busy urban area offers LBS services to learners with developmental disabilities, including brain injuries, intellectual disabilities and Autism Spectrum Disorder. The school board began offering this program when they realized that these learners were not being adequately served in their other LBS service offerings. The organization has hired retired special education teachers to staff this program.

Services are offered three times per week for three hours each at the school board's adult learning centre. Learners typically attend the program about one year, with attendance being fairly consistent.

Learners are typically living at home or in an assisted living residence. Learners have a variety of goals – from getting a high school diploma, to attending an Early Childhood Education program at a local college, to being able to do banking on their own.

Approximately 10 learners are participating in the program, with two instructors and an occasional volunteer available to support the students. Learners do a mix of independent and group activities. For example, learners work independently to develop a mock presentation about an issue that is important to them, which they then present in a group setting in order to demonstrate their presentation and communication skills, which they may need in future jobs or school-based settings.

The instructors ensure that learners are aware of the relevant services in their community, including the Ontario Disability Support Program, Community Living and employers that commonly hire people with disabilities. These supports are often critical to ensuring that learners transition to their goals.

---

[24] "Composite" means that, where possible, information is based on multiple sources and sites. This is done in order to ensure confidentiality. In some cases, other details have been included as well, in order to further disguise the identity of particular sites or stakeholders.

Composite example 2

A community agency, "Francophone Literacy Services", situated within a predominantly Anglophone rural community offers Francophone LBS services. The organization is co-located within a community hub that includes other supports, such as Employment Service (ES).

Training is offered primarily on a one-to-one tutoring basis, with a focus on improving computer skills for employment- or education-related goals. This one-on-one approach was taken because this site serves such a small number of learners.

The two part-time instructors work diligently to get to know the learners' backgrounds and goals in order to tailor the training accordingly. For example, one learner wants to work on her communication skills in order to enter a customer service position so the instructors role-play with her in order to practice working with colleagues and customers.

Learners are often already connected with Ontario Works, but may need help finding out about lesser known resources such as Legal Aid, the food bank or night classes offered by the francophone school board.

Learners often have a lot going on in their own personal lives and may attend for a few weeks and then suddenly stop attending, only to return a few months later. While many learners transition to their goals, some learners come and go for extended periods of time.

Composite example 3

A community based Aboriginal stream organization, "Literacy Skills Organization", offers LBS services to Aboriginal learners on-reserve. The reserve is home to approximately 500 individuals, most of whom are survivors of the residential schooling system, or the children of survivors; most suffer from what program staff describe as historical trauma.

Learners have the goals of getting their high school diploma, finding employment in forestry or other industries, or gaining greater independence so that they can read notes from their child's schoolteachers, budget for groceries, and the like. LBS is offered a few days a week and the program operates on a drop-in model where learners can use computers and work on individualized activities when the LBS room is available. Culturally relevant activities such as sewing and quill box making help to practice numeracy (based on the measuring involved).

Learners generally know about services on the reserve, so the staff do not need to make many referrals.

Staff find that learners experience barriers in meeting their goals. The reserve has high rates of suicide, substance abuse, Fetal Alcohol Syndrome, diabetes, poverty, and unemployment that are well above provincial averages. Staff strive to be flexible, non-judgmental and encouraging in order to help learners move towards their goals.

2.5 LBS is not meeting all potential needs

The LBS program, like many literacy programs,[25] is not reaching all of the individuals who could benefit from it. **Most Ontarians with low literacy levels are not accessing LBS**: each year, the program serves only about 40,000 of the four million working-age Ontarian adults with literacy skills below Level 3.[26]

The evaluation uncovered several potential reasons for this unmet need:

Demand is much lower than need. Fewer than 20% of programs have wait lists, and waiting times for LBS services are typically less than six weeks.[27] Providers explained this low demand by pointing to the powerful stigma associated with low literacy.[CV, SPS] Low demand may also be due to the fact that potential learners do not always see the need to improve their skills, may lack motivation, and sometimes experience practical barriers such as a lack of time.[28] Since the evaluation did not solicit the perceptions of Ontario adults who are not participating in LBS, it was not possible to formally assess the level of demand or the reasons for low demand.

Public awareness of the LBS program is weak. Many learners (64%) expressed that they did not know that LBS training was offered in their community before they started.[LS] Providers pointed to a lack of resources for publicly promoting and branding the LBS program.[CV, SPS] Indeed, learners find out about LBS most commonly through their social networks (family or friends), rather than through public promotion campaigns.[AD, CV, LDG, LS] Alternatively, they learn about the service through other providers, such as Ontario Works (OW), ES, and school.[AD, CV, LDG, LS]

LBS expansion is limited by funding. The LBS program as a whole is currently reaching fewer than its target number of learners served (92% of target),[AD] and providers report that their current budgets leave them financially stretched.[CV, SOI, SPI, SPS] As such, significantly expanding LBS's reach to additional learners will likely require an increase in funding.[29]

Recommendation F-2: Explore strategies to reach more potential learners. These strategies may include:

---

[25] Encyclopedia of social problems. (2008). Illiteracy, adults in developed nations.

[26] Statistics Canada. (2013). Skills in Canada: First results from the Programme for the International Assessment of Adult Competencies (PIAAC).

[27] MAESD. (2015). Locations project data.

[28] Windisch, H. C. (2015). Adults with low literacy and numeracy skills: A literature review on policy intervention. OECD Education Working Papers, No. 123.

[29] MAESD. (2015). 2014-15 performance analysis – budgets.

- Increasing demand for the program, for example by changing its name to deemphasize the stigmatized words "literacy" and "basic."

- Increasing awareness of the program, for example by launching a provincial promotion campaign which makes clear what supports are offered through LBS and the benefits that it can confer on learners.

- Increasing capacity, for example by identifying providers that serve high-demand areas, investing additional funds into those providers, and raising their Learners Served targets accordingly.

2.6 Conclusions

A great strength of the LBS program is that learners are satisfied and feel that they are getting what they need to transition to their next step. This strength was also highlighted in the 2011 evaluation of LBS.[30]

However, **LBS, like many literacy programs,[31] is reaching only a small fraction of the individuals** who could benefit from it. Meeting more of the province's literacy needs will require transforming need into demand, increasing awareness of the program, and expanding program capacity through additional funding.

---

[30] Deloitte. (2011). Evaluation of the LBS program.

[31] Encyclopedia of social problems. (2008). Illiteracy, adults in developed nations.

3 How well does the LBS program align with government priorities?

3.1 Introduction

This chapter focuses on the extent to which the LBS program aligns with government priorities.[32] As a ministry, the MAESD is focused on supporting vulnerable populations to achieve the skills they need and on supporting transitions to further education, training and strengthened employment.

This chapter concludes that LBS is strongly aligned with the following Ministry priorities:

- supporting vulnerable populations;

- supporting transitions;

- collaborating with other ministries; and

- applying systematic tracking, accountability, and transparency.

There remain questions about whether LBS is intended as an economic intervention designed to get people jobs, a social intervention designed to spread literacy as a human right, or both.

3.2 LBS contributes to Ministry priorities

As mentioned in chapter 2 which focuses on relevance for learners, **Ontario is committed to developing a highly skilled, adaptable workforce**. The 2014 mandate letter emphasizes this role for skill development along with focusing resources on those who need them most.[33] The mandate letter details how the Ministry is contributing to this vision through three core objectives:

- Helping people choose their path.

- Ensuring an accessible, high-quality, and sustainable postsecondary education system.

---

[32] Information regarding community priorities is covered in the next chapter on determining and addressing community needs.

[33] Wynne, K. (2014). 2014 mandate letter: Training, Colleges and Universities.

- Building Ontario's integrated employment and training system.[34]

> "Growing the economy and helping to create good jobs are fundamental to building more opportunity and security, now and in the future. That critical priority is supported by **strategic investments** in the **talent and skills of our people**, from childhood to retirement."
>
> -Premier Kathleen Wynne

LBS contributes to each of the Ministry priorities, as detailed below.

Supporting vulnerable populations

In her mandate letter, Premier Wynne asked the Minister to focus resources particularly on those who need them most – persons receiving social assistance, persons with disabilities, the long-term unemployed, Aboriginal peoples, newcomers, and at-risk youth – as part of the government's Poverty Reduction Strategy.[35] The LBS program, with streams dedicated to Francophone, Aboriginal, and Deaf learners and a focus on people who are unemployed, is clearly designed to support vulnerable Ontarians.[MI, 36]

Currently, LBS learners are more likely than the general population to be Aboriginal, Francophone, or Deaf, but appear to be less likely to have disabilities.[37] It is important to note

---

[34] Wynne, K. (2014). 2014 mandate letter: Training, Colleges and Universities.

[35] Wynne, K. (2014). 2014 mandate letter: Training, Colleges and Universities.

[36] MAESD. (2016). LBS: Service provider program guidelines.

[37] Population comparisons were based on the best information available and are not perfect; however, they provide meaningful information to understand how LBS compares.

Ontario. Ministry of Finance. (2013). 2013 National Household Survey highlights: Factsheet 3.

Ontario. Office of Francophone Affairs. (2014). Data based on the Inclusive Definition of Francophone from the 2011 Census.

Accessibility Ontario. (2016). About the Accessibility for Ontarians with Disabilities Act.

Canadian Association for the Deaf. (2015). Statistics on Deaf Canadians.

that the learner estimates for each of these groups are likely underestimates, as learners may not disclose this information during the registration process.[CV] Even in the non-Anglophone streams (Francophone, Aboriginal, and Deaf), learners may choose not to identify as such, indicating strongly that these identities are underreported.[AD, CV]

LBS also serves a high number of individuals receiving social assistance and who are unemployed, compared to the general population.[AD]

LBS group identification[AD]

In-person LBS learners
General population

Aboriginal 7.0% / 2.4%	Francophone 7.0% / 4.8%	Person with Disabilities 9.0% / 15.5%	Deaf or Deaf-Blind 1.0% / 0.1%

Social assistance and employment[AD]

Receipt of social assistance 33.0% / 6.5%	Unemployed 53.0% / 7.9%
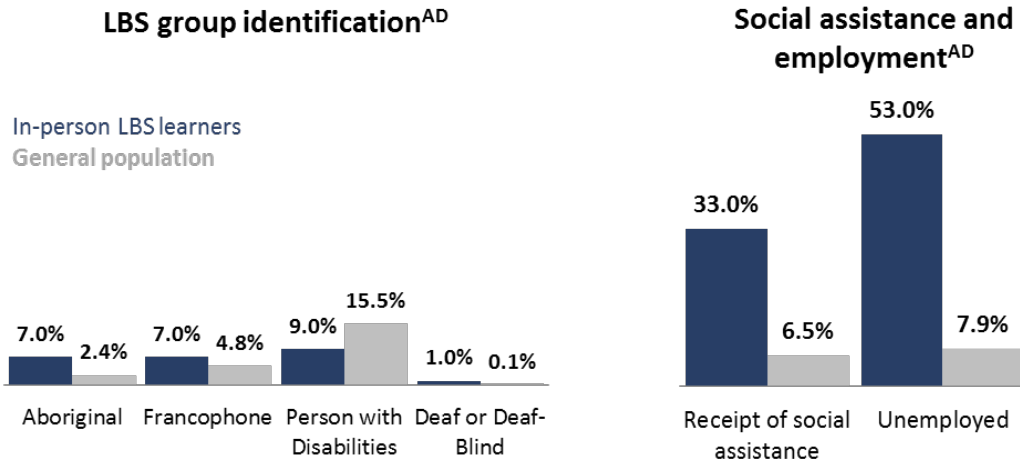
Supporting transitions

The mandate letter instructs the Ministry to focus on transitions and emphasizes employment and further education as transition pathways.[38] In keeping with this, LBS is built on a transition-focused framework, the OALCF, which offers learners goal-directed programming in order to achieve their next steps, whether it be further education, training, employment, or independence. As described in an OALCF-related document:

Over the years, LBS practitioners have deepened their understanding of how goal-directed and contextualized learning can contribute to a learner's success to move within and beyond the LBS Program – to transition to her or his next steps of employment, broader education and training, or independence. Furthermore, practitioners have realized that adult literacy learners

---

Ontario. Ministry of Community and Social Services (MCSS). (2016). Ontario Social Assistance monthly statistical report: OW; ODSP.

Statistics Canada. (2016). Estimates of population, Canada, provinces and territories.

[38] Wynne, K. (2014). 2014 mandate letter: Training, Colleges and Universities.

achieve more positive outcomes when they also receive integrated support services from their communities.[39]

Chapter 8, which focuses on learner outcomes, provides more detail on how learners are succeeding in making transitions that are aligned with their goals.

Collaborating with other ministries

The mandate letter emphasizes collaboration with a number of other ministries including the Ministry of Education (EDU) and the Ministry of Citizenship, Immigration and International Trade (MCIIT), with a focus on transitions.[40] Ministry interviewees indicated that collaboration with relevant ministries is indeed occurring,[MI] however, based on the data collected it is not possible to know how extensive this is.

At the program delivery level, it is known that referrals are being made to EDU- and MCIIT-funded programs, which does show collaboration between funded programs on the ground.[AD, CV] Seamless transitions between programs funded by the MAESD, EDU, and MCIIT are supported by co-location, where an LBS program is housed in the same building as ESL (English as a Second Language) and/or secondary school programs.[CV]

Supporting Aboriginal communities

There are currently 19 Aboriginal stream LBS service providers, with five providers on reserve and the remainder off-reserve. Partnerships with Aboriginal communities are in place, but these learners and communities could be better supported.[CV, MI, SOI] For example, LBS could expand into more Aboriginal communities and support organizations could provide additional capacity building for Aboriginal stream providers.[MI]

---

[39] MAESD. (2011). Foundations of transition-oriented programming. P. 1.

[40] Wynne, K. (2014). 2014 mandate letter: Training, Colleges and Universities.

> "We are working in partnership with Aboriginal communities – but we **could do so much more.**"
>
> -Ministry staff[MOI]

Applying systematic tracking, accountability, and transparency

Accountability and transparency across the employment and training system are an area of focus for the MAESD.[41] The PMF and EOIS-CaMS, along with this evaluation, are intended to support accountability and transparency. Most service providers (75%) agree that EOIS-CaMS supports accountability.[SPS] but there are pervasive concerns about time commitment required for EOIS-CaMS.[CV, MI, SOI, SPI, SPS] (These issues are explored in depth in chapters 9 and 10, which focus on effectiveness and efficiency and the PMF). Further work needs to be done in order to ensure that the results of LBS data collection efforts are meaningful, accurate, and accessible to relevant stakeholders.

Recommendation F-1: Continue to fund and support the LBS program as a key part of the Ministry's efforts to promote skill development. Communicate that LBS is a valued and integral part of the EO system.

3.3 There are questions about LBS's alignment with other Ministry priorities

Serving youth

The Ministry mandate letter includes an emphasis on supporting youth.[42] Service providers are allowed to serve young adults (16-18 years old) on an exception basis, and the proportion of young adult learners enrolled in a fiscal year at a site cannot be more than 10%.[43] Currently, just 3% of LBS in-person learners are aged 16-18 years old.[AD] Ministry staff indicated that the Ministry of Education focuses on serving the younger population, which is why this restriction is

---

[41] Wynne, K. (2014). 2014 mandate letter: Training, Colleges and Universities.

[42] Wynne, K. (2014). 2014 mandate letter: Training, Colleges and Universities.

[43] MAESD. (2016). LBS: Service provider program guidelines.

in place.[44] Additionally, it is recognized that suitability indicators for LBS gear the program to older learners (between 45 and 64 years of age).[45]

Service providers and support organizations questioned why youth could not be served by LBS, as they felt the program is well positioned to do so:[SOI, SPI]

'Why aren't youth included?' some people ask. If you have a young person who is addicted or has mental health issues or is couch-surfing, that youth needs to be served. For Employment Services, it's all about youth youth youth so why isn't LBS recognized for serving youth?[SOI]

More specific questions were raised about the MAESD Youth Job Connection (YJC) program,[SOI] which serves "youth aged 15 to 29 who experience multiple and/or complex barriers to employment by providing more intensive supports beyond traditional job search and placement opportunities."[46] It was indicated that the mandates of LBS and YJC may overlap:[MI, SOI, SPI]

When you think of someone on their path to employment, they would need foundational skills in order to then get a job. Within YJC they deliver what is close to an Independence goal path, arguably, in order to be better ready for employment. We've had the question whether YJC was thinking about outsourcing it to LBS. Are we paying them to ramp up LBS instead of YJC?[MI]

We have the Ontario Jobs Grant and YJC, and literacy is an afterthought of that. YJC works with at-risk youth [but] literacy isn't part of it….We weren't even listed as being involved with that.[SOI]

Providing customized workplace programs

The mandate letter indicates that customized workplace training programs are an option for giving people the experience they need to fill high-demand occupations.[47] Indeed the literature indicates that the workplace is an ideal context for learning.[48] This approach can reach learners

---

[44] Communication with Ministry staff.

[45] MAESD. (2016). LBS: Service provider program guidelines.

[46] MAESD. (2016). Youth Job Connection (YJC).

[47] Wynne, K. (2014). 2014 mandate letter: Training, Colleges and Universities.

[48] Windisch, H. C. (2015). Adults with low literacy and numeracy skills: A literature review on policy intervention. OECD Education Working Papers, No. 123.

who would not normally attend literacy-related programs and have a positive impact on employers and learners alike.[49]

LBS does not consistently specialize in customized workplace programming. Over 2009/2010 – 2010/2011 the Ministry piloted the Workplace and Community Workforce Literacy and Essential Skills (WLES) Initiative, which included workplace specific programming. Over the course of the evaluation, examples of this type of training were mentioned during consultations (e.g. training to operate a chainsaw, work at a cash register, or work in a call centre)[CPI, CV] Ministry interviewees raised the idea that there could be a better understanding of employers' workforce development needs to ensure that employer needs are being met.[MI] This could include the expansion of workplace-based literacy services and career laddering programs.[MI]

Preparing learners for independence

The mandate letter includes an emphasis on supporting vulnerable populations, as well as an emphasis on supporting transitions to employment and further education and training.[50] In some cases, however, vulnerable populations face multiple barriers in their life which make it difficult to quickly move towards transition.

This creates dilemmas for the LBS program. Ministry interviewees questioned whether LBS is a good fit for learners in the Independence goal path given that it focuses on social inclusion as opposed to employment and education.[MI] 12% of learners are in the Independence goal path.[AD] Interviewees stressed that learners with Independence needs should continue to be served but potentially by another body (whether it is by another program or ministry or at another level of government):

The question always is, where does [the Independence goal path] belong? It is alluded to in the mandate letter that there isn't a wrong door, but maybe there is a better door.[MI]

Service providers and support organizations indicated that the field is feeling pressure to not serve learners in the Independence goal as learners do not score well on the PMF and/or stress the need for the Ministry to recognize the value of this goal path. [CV, SOI, SPS]

---

[49] Windisch, H. C. (2015). Adults with low literacy and numeracy skills: A literature review on policy intervention. OECD Education Working Papers, No. 123.

[50] Wynne, K. (2014). 2014 mandate letter: Training, Colleges and Universities.

> "There isn't a **wrong** door, but maybe there is a **better** door."
>
> – Ministry staff[MI]

3.4 Conclusions

LBS supports a number of Ministry priorities. In particular, LBS aligns with the government's commitment to support vulnerable populations, support transitions (especially transitions to employment and education), collaborate with other ministries, and ensure accountability.

Questions have been raised about areas where alignment could be stronger. LBS service providers do serve youth aged 16-18 but only a small number of them (3% of the program's learners). The **Ministry should consider whether LBS ought to have a stronger role supporting the literacy needs of youth** under 18.

Likewise, a **few customized workplace programs are being offered** by individual LBS service providers, but this could be done more systematically and could be better supported at a provincial level. LBS is primed to play a key role in delivering these types of programs, should this align with the Ministry's plans and resources.

Ministry interviewees also **raised questions about the Independence goal path,** while providers and support organizations have felt pressure to move away from this path. This is in line with the inherent tension about who LBS should be serving: the program is supporting transitions to employment and education, on the one hand, and serving vulnerable populations on the other. While it is recognized that these two groups are not mutually exclusive, this tension, between **LBS for those who need it most** and **LBS for those who can make the most progress**, plays out in a number of areas of program management and service provision, and particularly in service providers' dilemmas in meeting PMF requirements (see chapter 10 which focuses on the PMF). Given the program's focus on serving vulnerable populations and building skills, it does seem like the Independence goal path fits within the program and the Ministry's mandate. Unless this goal path and its related learners fit well in another government program, LBS will need to continue to support these learners and consider how to best adapt aspects of the program (e.g. the PMF) to fit it.

4 How well does the LBS program determine and address the needs of local communities?

4.1 Introduction

This chapter explores how community needs are identified and addressed and the extent to which LBS offerings are in line with community needs.

LBS service providers operate across four regions and 16 regional catchment areas of Ontario. Each program is situated within a smaller community and expected to identify and meet the unique needs of learners in that community and collaborate with community partners and regional networks to ensure community needs are met. The program is designed to meet local community needs, with the formal Literacy Service Planning and Coordination process in place to address emerging community needs and reduce duplication.[51]

It was out of scope of this evaluation to do an in-depth consultation with community partners/employers. As well, Literacy Service Plans (LSPs) are not rolled up and analysed at the regional or provincial level by the MAESD which meant that trends in community needs could not be systematically identified.

LBS service providers are building on partnerships and available data to make decisions about how to best serve their communities. Partners believe the supports offered are largely meeting the needs of their communities. Strong partnerships are fueling the ability to meet community needs, and a lack of resources and awareness are the key barriers.

4.2 Needs are determined and addressed based on partnerships and data

To identify community needs, **service providers rely largely on mechanisms that bring them together with their partners** (connections with partners, regional network-related activities such as discussions, meetings, LSPs) and on existing data sources (labour market information, learner data).[SPS] See the following chart for details.

---

[51] MAESD. (2016). LBS: Service provider program guidelines.

Where service providers get information about community training needs (n=242)[SPS]

Source	Percentage
Connect with our community partners	94%
Review labour market information	79%
Regional network planning discussions/meetings	78%
Literacy Service Plan	76%
Learner data: EOIS-CaMS	74%
Other community planning (not reg. network)	71%
Regional network	68%
Sector support organisation	52%
Own needs assessments/planning/research	48%
Learner data: Non-EOIS-CaMS	41%
Stream support org.	31%
Other	29%
We don't get information about our community's training needs	2%

Literacy service planning is working. The Literacy Service Planning process, coordinated by the regional networks, was seen as highly supportive for its contribution to service planning and service coordination. [SOI, SPI] This resonates with the 2011 evaluation finding that the LSPs are an effective way of coordinating service delivery.[52]

LSPs were described as helping to understand what is happening in the community, reducing duplication of services, supporting community engagement, sharing resources and best practices, and discussing challenges.[CPI, CV, SOI, SPI]

---

[52] Deloitte. (2011). Evaluation of the LBS program.

> "We build [the LSP] together and approve it together. From attending those meetings, we know exactly what's going on."
>
> – Service provider[SPI]

Recommendation F-3: Continue Literacy Service Planning at the local level, with the involvement of relevant community partners.

Recommendation F-4: Develop capacity to roll up and analyse LSP documents regionally and provincially in order to systematically document trends and issues and respond quickly to emerging needs. Streamline the process by which Ministry staff can gain access to EOIS-CaMS data, and support organizational capacity in the Ministry to have the data analysis skills necessary to make the best use of EOIS-CaMS data.

4.3 LBS is largely aligned with community needs

Overall, **LBS is meeting at least some of the demand for literacy-related services** in local communities based on consultations with service providers, support organizations, and community partners.[CPI, SOI, SPS] About one quarter of providers (26%) believe that LBS service providers are fully meeting community training needs.[SPS]

LBS community partners include a variety of organizations focused on employment, health (including mental health, substance use issues), social assistance, education, social services (e.g. housing, food banks), newcomer services (including ESL), and workforce development.[CPI, CV, SOI, SPS] Based on interviews with a sample of community partners, they perceive that community needs are generally being met, with appreciation for literacy training that builds employment skills and life skills (e.g. filling out forms, reading bank statements).[CPI]

Support organizations most commonly stressed that LBS providers were meeting needs related to wraparound supports/service coordination.[SOI]

> "For the past couple of years, there was more of a push for LBS agencies to prepare people for apprenticeship. This is more **in line with the labour market needs in our region**."
>
> – Community partner[CPI]

4.4 Enablers and barriers

Strong partnerships and relationships with other providers was the most common enabler of addressing learner needs. [CPI, CV, SOI, SPI] This supports trust building and open lines of communication, avoids competition, and supports cross-referrals. [CPI, SOI, SPI] Community partners value their relationships and connections with LBS service providers through participation on roundtables/committees and through informal contact. [CPI]

Stakeholders pointed to the following reasons for not meeting community needs: a lack of resources (unable to provide a full range of services or meet demand), a lack of awareness of LBS, or a lack of awareness that literacy is an issue. [CPI, SOI, SPI, SPS]

Specific needs cited as not being met included computer-related literacy classes/supports, supports for learners with low levels of literacy, support for learners in remote locations, and second language training (which LBS does not offer). [CPI] Support organizations added that other learner groups were not receiving as much support as they could. [SOI] Community partners identified the following groups as not having their literacy needs fully met: youth, learners with complex barriers and special needs, learners with mental health issues, learners with English as a second language and Aboriginal learners. [SOI, 53] It is recognized that the LBS mandate does not focus on youth or learners with English as a second language.

4.5 Conclusions
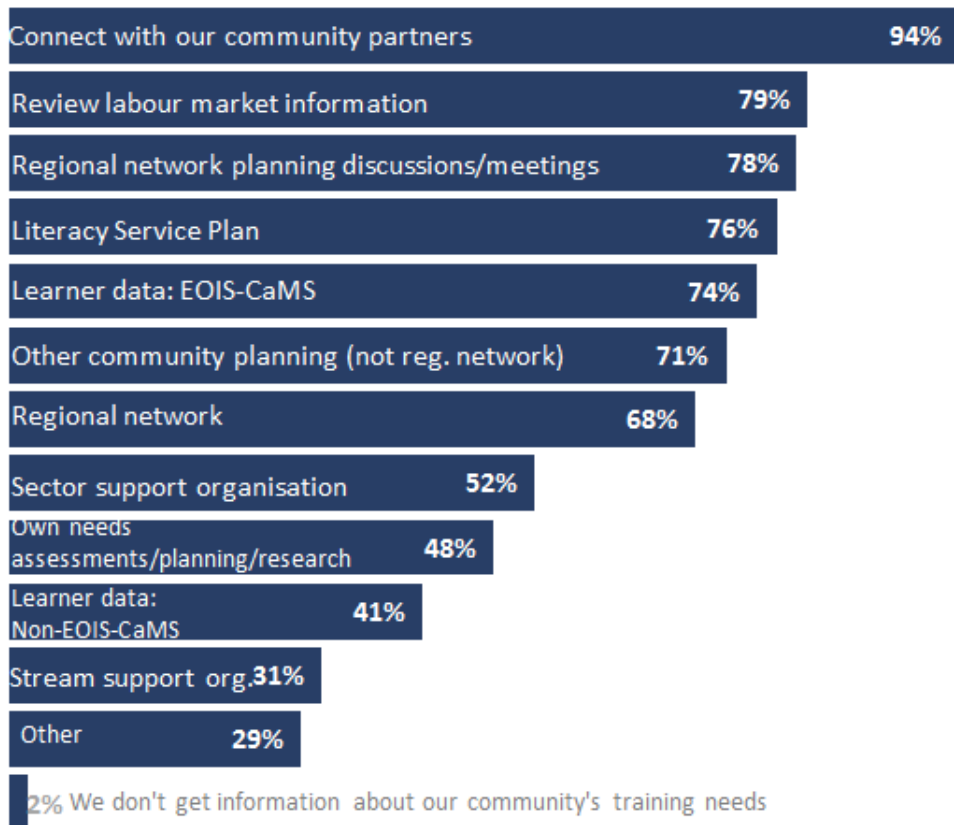
LBS service providers are building on partnerships and available data to make decisions about how to best serve their communities. An efficient planning process at the regional level helps to coordinate and eliminate duplication. Partners believe the supports offered are largely meeting the needs of their communities. Strong partnerships are fueling the ability to meet community needs, and a lack of resources and awareness are the key barriers.

---

[53] Given that only a small subset of community partners (26 individuals) were interviewed, these interviews were treated as exploratory in nature and should not be viewed as representing all potential community partners. It is not possible to assess the extent to which these specific needs are or are not being met.

5 How well does OALCF support effective program development and delivery? & Have service providers implemented and delivered LBS service delivery functions in accordance with the OALCF guidelines?

5.1 Introduction

This chapter focuses on the OALCF's implementation, LBS service alignment with the OALCF and its overall effectiveness.

The OALCF is an organizing framework that is competency based, learner centred, and transition oriented. It was introduced to the service delivery network in 2011 and incorporated in service delivery starting in April 2012. The framework is outcomes based with six competencies at three levels organized along goal paths. The OALCF requires service providers to work with learners to identify their goals and determine what competencies they need to take their next steps toward those goals.

Although implementation of some aspects of the OALCF is uneven, its learner-centred, transition-oriented spirit is embraced by providers and learners alike. Overall, LBS implementation is in line with the spirit of the OALCF. Service providers are implementing a task-based approach that is helping learners achieve their goals.

Providers feel that the OALCF has impacted their services positively or in a neutral way. Providers did indicate that the OALCF has negatively impacted the time it takes for their site to deliver services. Other stakeholders (Ministry, learners, community partners) are largely satisfied with aspects of the OALCF.

This chapter is organized by the five LBS service delivery functions (as shown in the graph below):

- information and referral,
- assessment,
- Learner Plan development,
- training, and
- exit and follow-up.

MAESD. (2016). LBS: Service provider program guidelines. p. 10

Each of the service delivery function sub-sections includes a description of intended and actual OALCF implementation along with a summary of the key themes emerging related to this function (in terms of alignment and effectiveness) and a summary of overall alignment with the OALCF.

It is worth noting that other jurisdictions are also organized with a delivery framework similar to the OALCF. Three provinces (British Columbia, Manitoba, and Nova Scotia) have an articulated system that starts with basic literacy and leads to an adult high school diploma.[IJ] Saskatchewan has a similar system but without the adult high school diploma.[IJ] The provincial frameworks are outcome based with levels, while still allowing for flexibility in order to allow curricula to match learners' needs.[IJ] Internationally, Australia, Massachusetts, Michigan, New Zealand and the United Kingdom all have frameworks to support skill development.[IJ] For example Australia has a national core skills framework for Reading, Writing, Numeracy, Oral Communication, and Learning which has five performance levels.[IJ]

5.2 Information and referral

Information and referral, under OALCF, is intended to:

- Provide practitioners with common language/concepts for describing and discussing learner performance.[54]

- Make referrals to LBS based on what learners can do and need to work on, including goal paths.[55]

- Help learners move easily across literacy programs.[56]

- Encourage other stakeholders to use the indicators to help make informed decisions about client referrals to programs in LBS delivery agencies.[57]

- Include learners in LBS with skills assessed as being less than the end of Level 3 of the OALCF.[58]

Description of implementation

Information and referral encompasses both how learners are referred into the program and how referrals occur while learners are in the program.

Learners commonly find out about LBS through word of mouth (about one third of learners[AD, LS]) or connections with other providers in the community (e.g. OW, ES).[AD, CV, LS] Once learners connect with a LBS provider, they may have an informal conversation about their needs and background or they may advance directly to a more formal assessment process.[CV] The program is described to learners so that it relates their goals.[CV] Staff describe how the program works, the options for learning (tutoring, classroom), what learners can achieve once they leave, and the estimated length of time they would require LBS services.[CV]

---

[54] MAESD. (2011). Curriculum framework; MAESD. (2015). OALCF desk aid.

[55] MAESD. (2011). Curriculum framework; MAESD. (2015). OALCF desk aid.

[56] MAESD. (2011). Curriculum framework; MAESD. (2015). OALCF desk aid.

[57] MAESD. (2011). Curriculum framework.

[58] MAESD. (2015). OALCF desk aid.

> "I greet them, ask them what they are looking for. We sit and chat. If it's busy in here I will go next door to talk privately. What did you take in high school? Academic stream? Basic stream? **We find out where they are at.**"
>
> – Service provider [CV]

Programs assess whether learners are eligible and best served by their LBS services.[CV, SPS] The main considerations for acceptance into a program are whether the client is best served by the programs offered by their organization (92%), the client's skill level in the OALCF competencies or International Adult Literacy and Skills Survey (75%), and the learning environment offered by their site (67%).[SPS] During consultation visits, providers referred to the three OALCF levels as opposed to the previous five-level LBS system.[CV]

The participant registration form is completed by staff and/or the learner.[CV] Each site determines when a learner is entered into EOIS-CaMS, and each provider does this differently.[CV, MI] A few (4/13 sites visited) mentioned concerns about the length and complexity of the registration form and indicated that it made learners uncomfortable because of the personal information requested.[CV]

OALCF common language is being used

Service providers and support organizations are **familiar with OALCF-related terms and concepts** (e.g. goal paths, Milestones, Culminating Tasks, Learner Plan, three OALCF levels, task-based).[CV, SOI, SPI, SPS] The spirit of the OALCF permeates LBS agency promotional materials (e.g. reference to goal paths but not reference to more specific terms like Milestones). It is unknown if OALCF language is used in referral protocols.

Providers generally perceive that OALCF concepts make sense to instructors (64%).[SPS] However, only 35% of service providers think OALCF concepts make sense to learners.[SPS] It is worth noting that OALCF concepts make more sense to instructors and learners in school boards and community agencies than in colleges.[SPS]

Goal paths are reflective of learner transitions

The goal path descriptions provide the framework for practitioners to support learners through training and information and referral services. Looking to other jurisdictions, a few (British Columbia, Michigan) specify particular goals that learners are intended to work towards, while

others (Manitoba, Michigan, Saskatchewan) work with learners to identify a goal unique to that learner.[IJ]

Overall, service providers think goal path descriptions reflect what learners need to be able to do when they transition to their next step.[CV, SPS, 59] As described in more detail in the chapter 8, which focuses on learner outcomes, the goal paths are aligned with where learners transition to, showing they are not just an abstract concept.[AD] A small number of providers shared concerns about the goal path descriptions included vague descriptions,[SPS] no breakdown by literacy level,[SPS] the language used is often beyond learners' capabilities,[SPS] the descriptions do not have actual pathways only explanations of what an outcome could be (with the exception of Secondary School Credit),[SPS] insufficient goal path-specific assessments,[SPS] and descriptions are too wordy.[SOI]

Referrals play an important role in learner success

Once in the LBS program, learners may be referred to other services at entry in order to support learner persistence and transitions,[CV, LS] or as instructors get to know learners better.[CV] 15% of learners are also offered training supports (on average $315) to help reduce barriers related to transportation and child care.[AD]

Most common services or supports learners referred to (n=1,149)[LS]

Service	Percentage
Computer training	24%
ES	20%
Transportation supports	19%
OW	18%
Volunteer opportunities	12%
ODSP	10%
Food banks	8%
Newcomer services	7%
Child care	7%

---
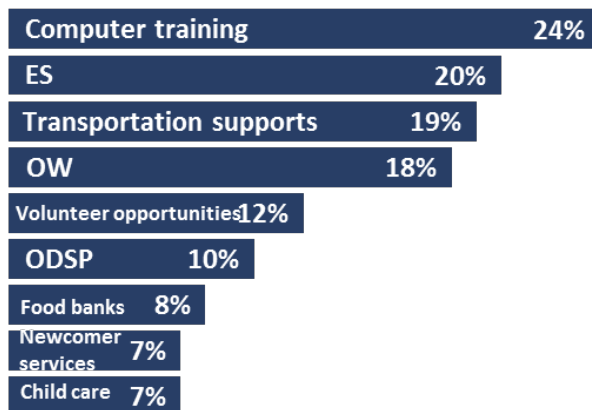
[59] It is important to note that, based on the open-ended responses, respondents often spoke about goals in terms of Milestones and Culminating Tasks in their responses; these are not, however, included in the goal path descriptions. As a result, these responses should be viewed with caution.[SPS]

Over half of former learners surveyed (54%) had been connected with another service.[LS] Of those learners, 43% indicated that they would not be able to attend LBS without these supports, which shows the value of these services.[LS] Most commonly, these services were computer training, Employment Services, transportation supports, OW, volunteering opportunities, and Ontario Disability Support Program (ODSP).[LS, 60] Current learners mentioned being referred to parenting supports, volunteering, brain injury services, testing for learning disabilities, YJC, pregnancy centres, and academic programs.[LDG] As described by one learner:

Instructors are really supportive. Whatever you need outside of here, they are getting. They tell me about other things in the community. [Instructor] has been good at referring us to places to community so don't have to go out of town. I didn't realize there is a brain injury place right here in town so I got referred. I would have gone all the way to [name of a city about an hour away].[LDG]

The 2011 LBS evaluation, which had a stronger focus on assessing wraparound supports, found that coordination of services was inconsistent across the province.[61] As a result, learners were often not aware of all the supports available to them.[62] It is important to note that this evaluation did not explore referral and coordination in great detail.

Relationships and partnerships developed between service providers and their community partners have made it easier to identify and address community needs.[CPI, SOI, SPI] Co-location, positive relations and good promotion practices were named as being especially supportive.[CPI, CV] Challenges regarding referrals include stigma related to literacy and a lack of places to refer learners (especially a concern for Deaf and Francophone streams).[CV, SPS]

Information and referral is challenging when learners leave early

Service providers highlighted that information and referral is an important service, but it takes a **significant time investment** to work with learners to understand their needs and this effort is not fully reflected in EOIS-CaMS.[CV, SPS] This is especially challenging when providers may spend a significant amount of time with **potential learners who do not end up staying** with the program.[CV] As described by one service provider:

---

[60] According to the administrative data, only 15% of learners were referred out.[AD] Referrals out may have been underreported due to misconceptions about what counts as a referral (see chapter 10, which focuses on the PMF) or the administrative burden of data entry (see chapter 9, which focuses on effectiveness and efficiency).

[61] Deloitte. (2011). Evaluation of the LBS program

[62] Deloitte. (2011). Evaluation of the LBS program

We need to wait to put [learners] into the system so we're certain they'll come back and are committed to the process. Out of 40 people I meet, maybe five will turn into [learners].[CV]

Extent of alignment

Providers are aligned in the following ways: They are integrating the OALCF language, giving learners information about the program and assessing learner fit for their program. While referrals are being made for many learners, there is room for increasing the focus on coordination and integration with community providers to ensure learners have the supports they need to succeed.

5.3 Assessment

Assessment, under OALCF, is intended to:

- Assess learners' level of performance at any given point in time (intake, ongoing, exit) using appropriate assessment tools.[63]

- Assess learners based on an assessment strategy (related to goal completion and Learner Gains) that includes assessment tools by goal path.[64]

- Assess learners based on the goal path descriptions, which help learners and practitioners understand the requirements of learners' goals.[65]

- Include Milestones (ongoing assessment) and Culminating Tasks (exit assessment).[66]

- Support accountability of the LBS program.[67]

Description of implementation

Learner assessment is an ongoing process that supports understanding of how learners are progressing towards their goals. Where assessment processes are working well, they can add structure to the training, track progress, and identify where the learner can improve.[CV]

---

[63] MAESD. (2011). Curriculum framework; MAESD. (2011). Foundations of assessment.

[64] MAESD. (2015). OALCF desk aid; MAESD. (2011). Foundations of assessment.

[65] MAESD. (2015). OALCF desk aid.

[66] MAESD. (2015). OALCF desk aid; MAESD. (2011). Foundations of assessment.

[67] MAESD. (2011). Foundations of assessment.

Most service providers (over 90%) indicated that they have an assessment strategy that includes:

- a suite of tools tailored to the learner's goal/level;

- tools for initial, ongoing, and exit assessment by goal path; and

- an indication of how the tools will be used and when.[SPS]

With the exception of Milestones and Culminating Tasks, tools to assess Learner Progress and Learner Gains are not prescriptive in nature and are unique to each provider.[CV, 68]

Assessments are commonly carried out by instructors who work with the learner on a day-to-day basis.[CV]

Initial assessments focus on particular skills, learning styles, and learning disabilities through a combination of formal tools and informal conversation.[CV] The majority of learners undergo an initial assessment (79% of past learners indicated they had an initial assessment[LS]; 84% of providers indicated all learners had an initial assessment[SPS]). Aboriginal stream providers are less likely to employ an initial assessment with all learners (53%) compared to other streams.[SPS]

Ongoing assessment occurs throughout the time that a learner is in a program. Many past learners recalled doing a test to track their learning progress (70%) or doing a Milestone (57%).[LS] Likewise, based on available data from EOIS-CaMS, learners are working on competencies and 97% are attempting Milestones.[AD] On average, learners attempt 2.7 Milestones, with 86% of the Milestones attempted actually being completed.[AD] A learner is in LBS for nine weeks (on average) before they complete a Milestone.[AD]

Ongoing assessments commonly include Milestones, instructor observation, demonstrations, and in-class tests and assignments.[CV] Instructors also provide ongoing informal feedback to learners.[CV, LDG, LS]

Exit assessments are intended to help identify that learners are ready for their next step. Only 33% of providers indicated they complete an exit assessment (beyond a Culminating Task) for all learners.[SPS] Exit assessments include Culminating Tasks, Milestones, and tests for specific subjects.[CV] Colleges (64%) are more likely than other sectors to have an exit assessment for all learners (school boards 13%, community agencies 26%).[SPS] As well, Deaf and Aboriginal stream service providers (18% and 13% respectively) are less likely to do exit assessments than Anglophone and Francophone providers (35% and 38% respectively).[SPS] Four of the 13 in-person consultation visit sites do not use any type of exit assessments.[CV] Providers were especially critical of Culminating Tasks,[CV, SPS] and it is not surprising that only 7% of learners complete a

---

[68] MAESD. (2011). Foundations of assessment.

Culminating Task[AD] given the issues raised. Chapter 10, which focuses on the PMF, provides more detail on these issues. Reasons for not employing an exit assessment include: exit is based on all the cumulative work that learners have completed while in the program as opposed to a final assessment; learners come and go unpredictably; or the learner decides when to exit based on their needs.[CV]

It was out of scope of this project to evaluate the appropriateness of the assessment tools used, including whether they relate to goal path descriptions.

Assessment approaches vary across providers, with concerns about Learner Gains

Each provider has a unique assessment process relying on different tools to assess learners.[CV] This is not surprising given that the Ministry does not prescribe how assessment is done but instead has suggested tools compatible with the OALCF.[69] Likewise, there is no regulation regarding who conducts assessments, with only one out of 13 providers visited during consultation visits having a full-time assessor position.[CV]

Ontario has been exploring the implementation of an LBS Learner Gains performance measure that is linked to a mandated pre-post assessment tool. Based on the jurisdictions reviewed, different approaches are employed regarding mandating assessments:

- Michigan, Massachusetts, and New Zealand use mandated assessment tools.[IJ]
- British Columbia, Manitoba, and Nova Scotia provide guidance on how to conduct literacy assessments without mandating tools.[IJ]

A few LBS providers indicated that they are concerned about the resulting assessment requirements that will come out of the Learner Gains Research Project.[CV, SPS] As stated by one provider:

The Ministry is moving towards Learner Gains. This is utterly daunting. It's just one more thing that will be put in front of the learner as an obstacle.[CV]

Milestones and Culminating Tasks are not perceived as effective by providers

Service providers **expressed criticism of the assessment aspect of the OALCF in two key areas: Milestones/Culminating Tasks and the administrative burden** associated with them.[CV, SPS]

---

[69] MAESD. (2011). Selected assessment tools.

Milestones and Culminating Tasks are the only assessment tools provided by the Ministry. Milestones are being used by providers, but Culminating Tasks are not.[AD, CV] Providers do not view these assessments as relevant or meaningful to learners (especially Culminating Tasks), with concerns about the time they take to implement and the potential to be damaging to learners.[CV, SPI, SPS] There are also concerns that there are not enough Milestones and Culminating Tasks to choose from to ensure that the assessment given is relevant to the learner's training goals.[CV, SPS] Overall, College sector and Deaf stream providers were more negative about Milestones and Culminating Tasks.[SPS, 70]

> "The **Milestones are not very meaningful to the students**. The Milestones are more meaningful to TCU than anyone else."
> – Service provider [CV]

The graphic below provides an overview of providers' views on Milestones and Culminating Tasks:

	Agree	Neither agree nor disagree	Disagree	Don't know
Milestone Tasks are **easy** to administer (n=240)	67%		13%	20%
Milestone Tasks are **relevant** to the learners we work with (n=240)	30%	26%	44%	
There are **enough** Milestone Tasks to choose from (n=239)	21%	18%	61%	1%
The Milestone Tasks are a **meaningful** part of instruction (n=240)	33%	23%	44%	
The Culminating Tasks help to assess if a learner is **ready for the next step** (n=238)	16%	16%	63%	6%
There are **enough** Culminating Tasks to choose from (n=240)	13%	12%	69%	7%

Where providers did find Milestones useful, it was because they were task-based, tied to learner goals, focused on learning, and tailored to the learner's goals.[CV]

---

[70] Based on an average of levels of agreement across six Milestone- and Culminating Task-related questions.

Unlike providers, **the majority of learners surveyed viewed Milestones positively**; 93% of learners agreed Milestones helped them see improvements in their skills.[LDG, LS, 71] However, this information should be viewed with caution, as learners surveyed tended to rate all aspects of the program highly (in the survey).[LS]

A more in-depth discussion of the impacts of the Milestone and Culminating Task implementation is contained in chapter 10.

Recommendation D-2: Review the merit of Milestones and Culminating Tasks in consultation with the field and with recognition of the field's concerns about these measures. In order to increase learner and employer buy-in, consider recognizing successful completion of a Milestone with an informal credential (such as a "badge") and attaching a formal credential to the successful completion of a Culminating Task.

Recommendation D-3: Develop more Milestones targeted towards particular tasks, learners, and goals.

Recommendation B-3: Do not implement the Completion of Goal Path measure until and unless the concerns that providers have with Culminating Tasks (the time required to take them, low learner buy-in, unattainability for many learners) have been resolved. Alternately, remove Culminating Tasks as a component of the Completion of Goal Path measure and implement a more suitable measure of readiness to transition.

Extent of alignment

Each provider has a unique assessment strategy, which is not surprising given that the Ministry does not prescribe any assessment tools beyond the Milestones and Culminating Tasks.[72] Most providers are doing initial assessments, using ongoing assessments and providing feedback.

The main area where alignment is not in place is the lack of exit assessment at the end of training. Providers are applying Milestones, which support ongoing assessment, but they are not consistently using Culminating Tasks, which support exit assessment. Providers have concerns about the relevance of both tools, indicating that their main purpose is to support accountability to the Ministry.

---

[71] Cross-referencing Culminating Task data from the learner survey[LS] with EOIS-CaMS data[AD] revealed concerns about accuracy of the learner survey data on this particular question. Similar concerns were not present for the Milestone question on the learner survey.

[72] MAESD. (2011). Selected assessment tools.

5.4 Learner Plan development

Learner Plan development, under OALCF, is intended to:

- Support Learner Plan development based on areas of strength and level of need specific to an individual learner.[73]

- Document what a learner needs to be able to do once she or he transitions.[74]

- Support a Learner Plan that provides other stakeholders with a clear understanding of what a learner has achieved in LBS.[75]

- Integrate OALCF concepts and terms (goal path, competencies, task groups, levels, etc.).[76]

Description of implementation

The Learner Plans should provide a clear indication of what learners should be able to do once they complete their goals and what they need to do to get there.[77] Learner Plans (or a similarly named document) are commonplace in literacy programming, with seven of the 10 jurisdictions we reviewed requiring such a document as part of literacy service delivery.[IJ]

Almost all service providers (97%) indicated that they have a Learner Plan for all learners.[SPS] Learner Plans are developed based on intake conversations, interviews, and assessments.[CV] As a result, reaching the point where a Learner Plan can be prepared can take a few weeks.[CV] Providers indicate that the content of the Learner Plan reflects the learner's goals.[SPS] Only a small number of Learner Plan templates (5) were provided during consultation visits. The templates that were reviewed contained OALCF language.[CV]

Providers have the option of creating their own Learner Plan form, or they can utilize the Learner Plan template created by the Ministry.[78] Regardless, providers are intended to have a Learner Plan separate from the Service Plan created in EOIS-CaMS.[79] The Learner Plan includes

---

[73] MAESD. (2015). OALCF desk aid.

[74] MAESD. (2015). OALCF desk aid.

[75] MAESD. (2015). OALCF desk aid.

[76] MAESD. (2011). Curriculum framework.

[77] MAESD. (2011). OALCF Learner Plan template instructions.

[78] MAESD. (2011). OALCF Learner Plan template instructions

[79] MAESD. (2012). OALCF Q&A part 2.

additional instructional and assessment information that the Service Plan does not.[80] A small minority of providers (13%) indicated that learners do not have a Learner Plan that is separate from the EOIS-CaMS service plan.[SPS]

About three quarters of service providers (74%) indicated that they always create Learner Plans with their learners.[SPS] About half of past learners (55%) recalled having a Learner Plan.[LS] Examples were given where the Learner Plan is also used by learners to keep track of their own learning.[CV, SPS] It is not known if Learner Plans are commonly shared with other stakeholders.

Most providers keep Learner Plans up to date.[LS, SPS] Sites may update plans according to a structured schedule, while other sites update Learner Plans on an ad hoc basis according to staff knowledge of specific learners.[CV]

The flexibility of Learner Plans is appreciated

Service providers **appreciate that they can use their own Learner Plans** and do not have to rely solely on the plan template created by the Ministry.[CV] This enables service providers to tailor the plans to their learner population.[CV] For example, at one site, this means that learners with special needs have Learner Plans in a very simple format, which makes it easier to follow, and learners entering secondary school courses have plans that look similar to the syllabus of credit courses so that they can get used to working with such documents.[CV]

Value of Learner Plans varies

The **perceived value and use of the Learner Plan varies**.[CV] About half of the providers participating in consultation visits placed low value on the Learner Plans, viewing them as additional administrative burden that did not meet staff or learner needs.[CV]

In the remaining sites visited, the Learner Plans are, at minimum, used by instructors to guide learning. Each Learner Plan acts as an individualized curriculum. Providers explained that Learner Plans are used actively by the learner themselves to track their progress.[CV]

Overall, **learners too have varied experiences with Learner Plans**. Only about half of learners recalled that they had a Learner Plan.[LDG, LS] Where learners did recall having a Learner Plan, they reported that they were involved in creating the plan (88%), it was created to meet their individual goals (93%), and it helped identify what they needed to achieve their goals (94%).[LS] In discussion groups, a few learners indicated that their Learner Plan was created when they first started and that it helped to clarify their goals, but that it was never referred to again.[LDG] At

---

[80] MAESD. (2012). OALCF Q&A part 2.

other sites, learners spoke about how the Learner Plan was useful for tracking their progress over time.[LDG] For example, they used the Learner Plan as a reference for what they would do each day and checking activities off once completed.[LDG]

Learner Plans are not always personalized to the learner when a structured curriculum is in place

Learner Plans are intended to be tailored to the learner in light of their individual goals; no two Learner Plans should be the same.[81] Based on consultation visits, **a small number (3 of 13 sites) do not feel that individualized Learner Plans make sense** when a structured curriculum is offered.[CV] As explained by a provider:

This is where I struggle, because OALCF's philosophy is that [the Learner Plan] should be collaborative between learner and staff to develop. But because we're following course outlines, which are signed off by the Chair, it doesn't fit us that well. We do explain to the student how it relates to ACE and where they need to go but it's not highly individualized because they're all going to ACE and then to postsecondary.[CV]

Extent of alignment

The majority of service providers (97%) are meeting the minimum alignment requirement of having a Learner Plan for all learners.[SPS] However, the Learner Plan is not being consistently used with learners in an ongoing way, with some providers using the plan only for administrative purposes, while others use it actively with learners to guide training. Individualized plans are not always useful in structured courses/programs. It is unknown if the Learner Plan provides other stakeholders with a clear understanding of what a learner has achieved in LBS.

5.5 Training

Training, under OALCF, is intended to:

- Support a task-based, competency-based approach to literacy instruction.[82]
- Support transition-oriented training that is tied to learner goals.[83]

---

[81] MAESD. (2012). OALCF Q&A part 1.

[82] MAESD. (2011). Curriculum framework.

[83] MAESD. (2011). Curriculum framework.

- Guide training content[84] (e.g. support practitioners in determining what tasks, activities, and learner materials are appropriate for each of the goal paths and learner levels[85]).
- Enable learners to make progress and gain competencies.[86]

The OALCF is *not* intended to impose a prescriptive curriculum.[87]

Description of implementation

LBS in-person service providers deliver training based on the following models:

- One-on-one tutoring, where a volunteer or staff person works with the learner individually.

- Structured courses, where groups of learners work on the same or similar activities with direction from an instructor; this may involve lectures, group work, and/or individual work, depending on the site and the course.

- Unstructured classes and independent study, where each learner works on his/her own individualized activities and receives support from an instructor on an as-needed basis. In some cases, small group activities may also be integrated.[CV]

Service providers integrate task-based and contextualized learning into their training activities to varying degrees.[CV] Providers who were part of consultation visits emphasized that they strive to provide their learners with an authentic learning experience that prepares them for their next step (transition oriented), but they also felt that there is a tension between this contextualized approach and the need to teach specific skills.[CV]

> "The **tasks are hopefully authentic** in that they parallel what they are doing in the community or on the job."
> – Service provider[CV]

Without conducting intensive observation, it is not possible to determine the extent to which sites are *fully* implementing task-based learning. Examples of task-based learning activities described by service providers included:

---

[84] MAESD. (2015). OALCF desk aid.

[85] MAESD. (2011). Curriculum framework.

[86] MAESD. (2011). Curriculum framework.

[87] MAESD. (2015). OALCF desk aid.

- Gardening
- Cooking
- Practicing job-related tasks
- Budgeting
- Making drums
- Calculating changes in the stock market
- Leaving a voicemail for a boss
- Reading medical prescriptions
- Practicing activities from a college-based program

Training is relevant to learner goals

As discussed in chapter 2, **learners overwhelmingly felt that the training they received was relevant** to their goals (90%) and that the amount of learning opportunities received was satisfactory (87%).[LDG, LS]

Task-based learning is not always clearly aligned with goal paths

Six out of 13 in-person delivery sites visited indicated that **task-based learning is inappropriate for students in particular goal paths** and can actually undermine transition-oriented programming.[CV] In this connection, two of the sites highlighted the Postsecondary Education goal path, while two of the sites highlighted the Secondary School Credit goal path.[CV] These sites sometimes focus on skills-based or academic training rather than task-based or contextualized training. This was explained as follows: [CV]

- Often the pre-ACE people don't have time for task-based. They [just] want to pass the test and get back in the ACE program.[CV]

- We try to use task-based learning activities as much as possible, so that if they don't go on to postsecondary they can use those skills somewhere else in life….So we're trying to incorporate more task-based into our academic stuff. But we are an academic program so we have to do a lot of the skills-based as well.[CV]

These examples may reflect confusion regarding how task-based learning could be adapted to certain streams, sectors, and goal paths, as opposed to an actual mismatch between task-based learning and LBS training.[CV] The OALCF conceptualizes task-based programming for those goal paths leading to further education and training. The practitioner guide to task-based programming provides examples of goal-related tasks:

- "Taking notes from a lecture
- Preparing for tests and exams

- Conducting research

- Working with other students on a project

- Locating the right resources in a library."[88]

And, when explaining whether tasks or skills come first: "In task based programming, goal-related tasks always come first….it is always task-to-skills-to-task."[89] OALCF documents acknowledge that for the Secondary School Credit and Postsecondary Education goals paths, providers need to find the right balance between skill-building and task-based activities.[90]

While providers are receiving training support to implement the OALCF, they want more

Three quarters of service providers have instructors who have received training related to the OALCF in the last 12 months, with the Deaf stream (58%) indicating its instructors had not received much training compared to other streams.[SPS] Support organizations have indicated that they are offering support and training regarding the OALCF.[SOI]

When asked what additional training providers would like, the most common response was OALCF-related training, including:

- general refresher regarding all aspects of the OALCF,

- implementation of next phase of the PMF (e.g. Learner Gains),

- ways to meaningfully integrate Milestones and Culminating Tasks into existing curricula, and

- the Apprenticeship goal path.[CV]

Extent of alignment

The flexibility inherent in the framework allows providers to tailor their offerings in order to address identified community needs.[CPI, CV] Service providers integrate task-based and contextualized learning into their training activities to varying degrees. Sites emphasized that they strive to provide their learners with an authentic learning experience that prepares them for their next step (transition oriented), but they also felt that there is a tension between this

---

[88] MAESD. (2011). Practitioner guide to task-based programming. P. 5.

[89] MAESD. (2011). Practitioner guide to task-based programming. P. 21

[90] MAESD. (2011). Practitioner guide to task-based programming.

contextualized approach and the need to teach specific skills. Most learners are making progress and gaining competencies.

There appear to be some misconceptions about what contextualized task-based training entails within different contexts. Without more intensive observation of LBS service delivery, it is not possible to determine the extent to which sites are *fully* implementing task-based learning in alignment with the OALCF.

5.6 Exit and follow-up

Exit and follow-up, under OALCF, is intended to:

- Support effective transition to next step goals, in part through referrals.[91]

- Ensure that learners undergo a formal exit interview.[92]

- Track, analyse, and follow up on learners who exit the program and transition to their goal.[93]

- Determine readiness to transition in exit interview.[94]

Description of implementation

Learners leave LBS after an average of eight months of training (range: 3.5 years) .[AD] Learners have a variety of reasons for exiting the program.[CV, LS] Learners and providers indicate that learners leave because:

- personal circumstances arose (health, family, busy with other things),[CV, LS]

- they achieved their goals,[CV, LS]

- the staff or the learner felt that that the learner was ready to exit,[CV]

- the program was not meeting their needs or expectations,[LS]

- a natural end date arrived (e.g. beginning of secondary school courses),[CV] or

---

[91] MAESD. (2011). Goal path descriptions.

[92] MAESD. (2015). OALCF desk aid.

[93] MAESD. (2015). OALCF desk aid.

[94] MAESD. (2015). OALCF desk aid.

- the learner reached Level 3 of the OALCF.[CV]

Notably absent are the Culminating Tasks; providers did not mention these as helping to determine if learners are ready to leave the program.[CV]

> "They may exit even if we don't think they're ready. **It's based on their timelines** and what's going on in their lives."
> – Service provider [CV]

81% of service providers indicated that all or most learners had an exit interview.[SPS] Only some learners (36%) reported doing an exit interview; where exit interviews were done informally learners may not have recognized them as such.[LS] The majority of service providers (at least 86%) indicated that exit interviews cover where learners are going next, their next steps, feedback on training, additional supports needed, referrals to those supports, and learners' satisfaction.[SPS]

Providers collect learner satisfaction data using the Ministry-mandated standard satisfaction questionnaire for all learners.[CV] These do not appear to be conducted anonymously.[CV] Many providers participating in consultation visits value the data because it gives them information for improvement and it positively affects the site's Service Quality Standard (SQS) scores.[CV] Some providers did not find it useful because the information is provided directly to a staff person (since learners will feel social pressure to give a positive response) or because most learners rate the program highly (so the feedback does not help sites identify areas for improvement).[CV]

Referrals are made to next-step organizations with or on behalf of learners.[CV] Providers are generally confident that learners are reaching their next step[CV, SPS] based on the follow-up process (at three, six, and 12 months); seeing learners informally; and through connections with other organizations that work with their learners afterward.[CV] Based on administrative data, between 58% and 64% of learners are followed up with at three and six months, and about half of learners are followed up with at 12 months.[AD]

Follow-ups are challenging

The most common challenge for follow-up is **transient learners who become unreachable** (e.g. the learner's phone number changed).[CV, SPS] Follow-ups were also considered time consuming and adding to an already busy work load, as this task falls to instructors.[CV]

Extent of alignment

Providers are aligned with the spirit of the OALCF related to the exit and follow-up service delivery function. Time and losing contact with learners are barriers to completing exit and follow-up processes with all learners.

5.7 Stakeholder perceptions

The Ministry appreciates the OALCF's structure

According to Ministry interviewees, the **OALCF provides a framework to shape how the program is delivered**.[MI] ETCs are able to use this framework to work with LBS service providers on a day-to-day basis.[MI]

Service providers have mixed perceptions about the OALCF

The majority of service providers (89%) feel their site has the capacity to deliver LBS services in alignment with the OALCF.[SPS] In terms of how the OALCF has impacted service delivery, **many feel that the OALCF has impacted their services positively or in a neutral way**.[SPS] The **main exception is the time it now takes to deliver services**, which 45% of providers saw as negative.[SPS]

	Positive	Neither positive nor negative	Negative	Don't know
OALCF impact on **quality of LBS services** (n=240)	44%	38%	17%	1%
OALCF impact on **learners' gains in skill/competence** (n=240)	41%	44%	9%	5%
OALCF impact on the **time** it takes for learners to attain their goals (n=240)	29%	42%	26%	3%
OALCF impact on **time** it takes for our site to **deliver LBS services** (n=240)	25%	29%	45%	2%
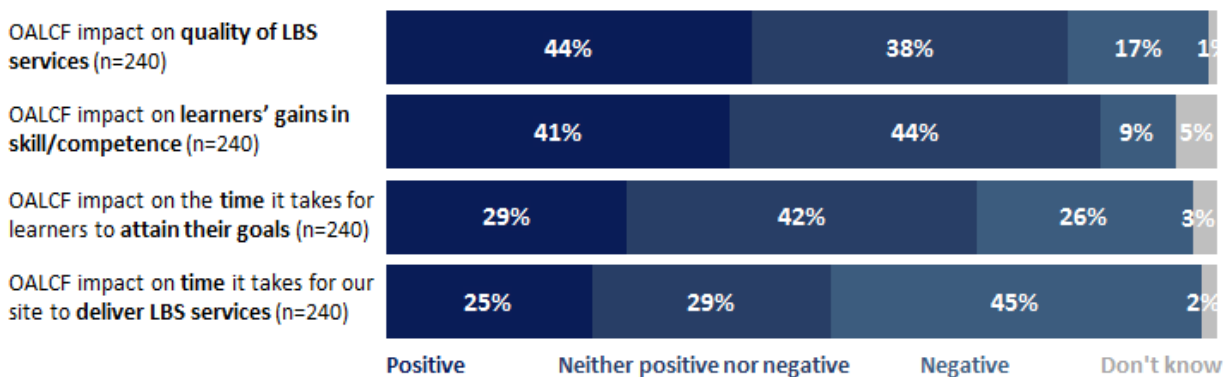
42% of providers perceive that the OALCF concepts (e.g. goal paths, Milestones, competencies) have contributed to the consistency of LBS program delivery across regions.[SPS] Consistency across the province should help learners move easily across Ontario's literacy programs. This perception is not surprising, nor necessarily a cause for concern, given the diversity inherent in

the program's structure (across sectors, streams, regions) and the intended flexibility of the OALCF.[95]

Positive comments offered by a few providers include: the OALCF has improved accountability, provided a common measurement process, increased consistency across the programs, delivered a solid process for measuring learners' progress, offered a more structured and standardized approach, allowed for flexibility given that the curriculum is not prescriptive, and provided meaningful goal paths.[SPS]

> "The three levels in the OALCF are so broad that there's a lot of leeway within them, and I like that about the new framework. It helps the students focus on what their next step in life is. **We take the elephant and figure out what the bites are.**"
>
> – Service provider [CV]

Some sectors and streams were less positive than others about the OALCF:

- College sector: 53% of respondents felt the OALCF negatively affected the time it takes for learners to achieve their goals, and 71% felt it negatively impacted the time it takes to deliver services.[SPS] In their open-ended comments, College respondents emphasized the extra work associated with administrative requirements that have resulted from the OALCF implementation, such as EOIS-CaMS data collection and entry and the implementation of the Milestones and Culminating Tasks, which do not always align with the College curriculum.[SPS]

- Cultural streams: The Aboriginal and Deaf streams indicated challenges with adapting the OALCF to their learners during consultation visits, but service provider survey results were not drastically different.[CV, SPS] This sentiment is expressed by a provider from the Deaf stream:

  There's not often much capacity to make things compatible for Deaf people. Essential Skills was developed and piloted for Anglophones. We found that the Deaf stream is often the last people consulted. That pretty much applies to everything – they develop for the Anglophone stream first and then try to fit it into the other streams. They need to change their way of thinking to be inclusive of everyone.[CV, SPI]

(For more information, please see chapter 10, which focuses on the PMF, and Appendix C: Case study on the Deaf stream, which includes a case study on the Deaf stream.)

---

[95] MAESD. (2015). OALCF desk aid.

Often, providers use the term "OALCF" almost interchangeably with "PMF" and "EOIS-CaMS." This indicates a perception that the OALCF is as much or more about accountability as about pedagogy, and a sense that these three changes are closely interrelated and part of a single overall Ministry strategy.[SPI] For some, the OALCF is inextricably intertwined with data entry and reporting requirements.[CV, SPI]

Community partners value aspects of the OALCF

While not necessarily understanding all the concepts, **community partners acknowledged the learner-centred and tailored training** taking place in LBS agencies.[CPI] For example, they value how LBS providers develop tailored training in response to the literacy needs identified by partners (e.g. computer literacy, customer service).[CPI]

Learners appear to value the OALCF

On the learner survey, learners indicated high levels of satisfaction (greater than 87% level of agreement) with OALCF elements, such as learner plans and assessments.[LS] It is difficult to interpret this finding, however, as learners consistently responded positively to *all* questions on the learner survey.[LS] It is likely that this represents a "halo effect": learners had a positive overall experience with the LBS program, and so they extended this sentiment towards each individual element of it.

Generally, learner satisfaction rates with specific aspects of service delivery were similar between the learner survey given as part of the present evaluation in 2016[LS] and the learner survey given as part of the previous evaluation in 2011.[96] It is challenging, however, to make meaningful comparisons on specific elements, as the 2011 survey was composed mainly of a different population (current, as opposed to past, learners).[97]

5.8 Conclusions

Although implementation of some aspects of the OALCF is uneven, **its learner-centred, transition-oriented spirit is embraced by providers and learners alike.** Providers feel that the OALCF has impacted their services positively or in a neutral way, except for adding to the time it takes to deliver services.[SPS] The flexibility allowed in the framework allows providers to adapt to meet their community needs.

---

[96] Deloitte. (2011). Evaluation of the LBS program.

[97] Deloitte. (2011). Evaluation of the LBS program.

Areas where the OALCF is not being fully implemented or concerns have been raised include the following:

- Exit assessments are not commonly used.

- Milestones and Culminating Tasks are not always viewed as relevant.

- While all learners have Learner Plans, these are not always used to support training.

- There is confusion regarding how task-based learning applies to certain streams, sectors, and goal paths.

- Exit and follow-up is time consuming and challenging.

Many of the accountability mechanisms associated with the OALCF are perceived to pose barriers to learners. The **main areas of concern expressed by providers were the Milestones and especially the Culminating Tasks**. Providers indicated that that they were seen as not meaningful to learners, time consuming and potentially damaging to the learner's confidence. For instance, one provider told the story of a learner who had left the program because of the anxiety and embarrassment caused by a Milestone.[CV,SPI] It was not possible to ascertain the prevalence of these negative effects. Learners who were surveyed did not share the same concerns; however, it is worth noting that they consistently responded positively to all survey questions.[SPS] Other, less prevalent concerns included the exit and follow-up interviews (time consuming, not best way to collect data) and the participant registration form (lengthy, asks personal questions).[CV]

Recommendation D-1: Keep the OALCF as a flexible competency-based, transition-oriented framework.

Recommendation D-4: Invest in continued OALCF training for service provider staff, with emphasis on areas of difficulty (e.g. task-based programming, effective use of learner plans).

6 How viable is e-Channel as a way of providing high-quality LBS programming?

6.1 Introduction

This chapter outlines the size, cost, implementation, effectiveness, and unique challenges of e-Channel. Overall, the findings suggest that e-Channel is a viable model for providing high-quality programming for certain learners either in conjunction with or as an alternative to in-person training. A case study exploring the future role for e-Channel within the LBS is also included in Appendix B: Case study on e-Channel.

6.2 Description of implementation

e-Channel is a MAESD initiative that provides online learning for Ontario adults. e-Channel was launched in 2007. Initially, e-Channel began with three service providers serving the Anglophone, Francophone, and Aboriginal streams. The College Sector Committee for Adult Upgrading (CSC) was funded to deliver Academic and Career Entrance/Access Carrières Études (ACE) Distance in 2008, and George Brown College (GBC) received funding to deliver e-Channel to the Deaf stream in 2012. In addition, the MAESD funds Contact North to provide technical support and services to e-Channel service providers.

There are now five organizations funded to deliver e-Channel:

- ACE Distance Delivery: Offered by the CSC, which is the e-Channel lead for the College sector.

- Le service de formation à distance pour adultes de l'Ontario (F@D): Offered by Coalition ontarienne de formation des adultes (COFA), which is the e-Channel lead for the Francophone stream.

- Good Learning Anywhere (GLA): Offered by Sioux Hudson Literacy Council (SHLC), which is the e-Channel lead for the Aboriginal stream.

- The LearningHUB: Offered by the Avon Maitland District School Board (AMDSB), which is the e-Channel lead for the Anglophone stream.

- Deaf Learn Now: Offered by GBC, which is the e-Channel lead for the Deaf stream.

The Learning Hub serves the most learners

The Learning Hub	2,656
ACE Distance	1,514
Good Learning Anywhere	844
Formation à Distance (F@D)	356
Deaf Learn Now	217
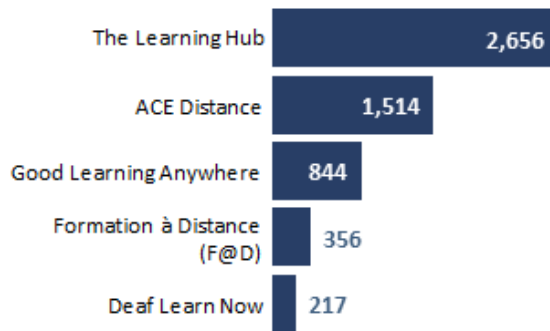
Three of the five e-Channel providers (SHLC, AMDSB, GBC) also offer in-person LBS services.

There were 5,587 e-Channel learners in 2014-2015, which is consistent with learner numbers from the previous year.[98] The Learning Hub and ACE Distance have 75% of e-Channel learners.[AD] As shown in the graphic to the right, Anglophone learners are most common across both delivery modes, with e-Channel also offering the opportunity to reach more Deaf and Aboriginal learners (when compared to in-person).[AD]

Stream distribution of LBS learners[AD]

	In-person (n=51,806)	e-Channel (n=6,789)
Anglophone	89%	75%
Deaf	1%	3%
Francophone	7%	7%
Aboriginal	3%	15%
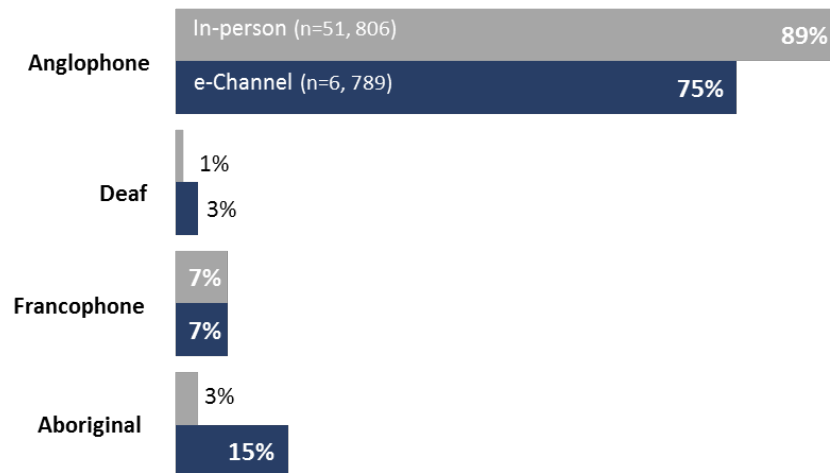
The majority of service providers (78%) across all streams, regions, and sectors report having "blended learners," except for the College sector, which is slightly lower (63%).[SPS, 99] Although it was not possible to determine the exact number of blended learners, it can be estimated that

---

[98] MAESD. (2015). E-channel costs, 2013-14 and 2014-15.

[99] Blended learners refer to learners who are concurrently enrolled in both in-person LBS and e-Channel.

at least one third of e-Channel learners (about 1,800 learners) are blended, given that this proportion of learners find out about e-Channel from an in-person service provider.[LS, 100] Throughout this chapter, it should be kept in mind that e-Channel figures include a large but unknown number of blended learners who are also attending in-person LBS training; the groups are not as distinct as they may appear.

37, 294 in-person learners

5, 587 e-Channel learners

Blended learners
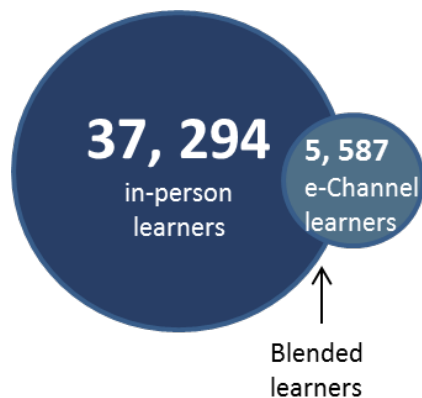
6.3 e-Channel is less costly and less intensive than in-person LBS

e-Channel is significantly less costly per learner[101] than in-person training, as shown in the chart to the right.[AD]

This is **most likely due to e-Channel being less intensive** for learners (i.e. e-Channel learners spend less time in training per week and attend for an average of 10 weeks, while in-person learners attend for 33 weeks on average)[AD] and because e-Channel has a higher learner-to-trainer ratio.[CV]

---

[100] Existing 2012-2013 and 2013-2014 LBS administrative data did not allow for the matching of user IDs for e-Channel and in-person data sets to produce a more precise number of blended learners. LBS data for more recent years should have this capability.

[101] 2014-15 operating budget divided by actual number of learners in 2014-15, regardless of how many weeks they attended.

**e-Channel costs three time less
per learner compared to in-person[AD]**

e-Channel	$650
In-person	$2,000
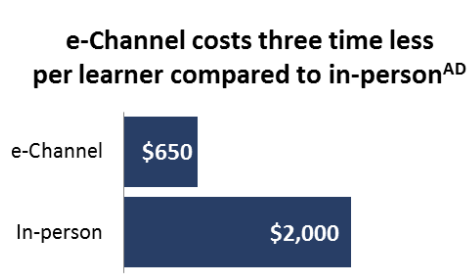
6.4 e-Channel is implemented according to the OALCF

e-Channel functions similarly to in-person services in that learners participate in initial and ongoing assessments including Milestones, complete Learner Plans, receive regular feedback from instructors, participate in exit interviews, and are followed up with after leaving e-Channel. However, referrals to other services are rarely made, there are fewer Milestones to choose from, e-Channel courses are more structured, assessments are more standardized, and there is less contact between instructors and learners.[102]

This subsection is organized by the five LBS service delivery functions:

- information and referral,
- assessment,
- Learner Plan development,
- training, and
- exit and follow-up.

Information and referral

Learners become aware of e-Channel in a variety of ways: in-person LBS providers (about one third of learners[LS]), the e-Channel's website, word of mouth, and connections with other providers (e.g. high school, ES).[CV, LDG, LS]

Potential e-Channel learners contact e-Channel through email, telephone, in person, or by filling out an online registration form.[CV] e-Channel sites consider the LBS eligibility criteria when accepting learners.[CV] Providers also consider whether the learner has the computer access,

---

[102] The differences between e-Channel and in-person services are discussed in more depth in the e-Channel case study in Appendix B: Case study on e-Channel.

Internet access, and digital skills necessary to use e-Channel services.[CV] Some eligible learners are deemed better suited to other programs and are referred as appropriate.[CV]

Like in-person learners, e-Channel learners need to complete participant registration forms.[CV] Compared to in-person sites, e-Channel sites rely more heavily on the learners themselves to fill out the registration form.[CV] e-Channel learners fill out the participant registration form on the computer, though some receive support for this process from staff over the telephone or via Skype.[CV]

There is inconsistent information between the administrative data and the learner survey on how often e-Channel learners are referred to community supports (34%[AD] and 7%[LS]). However, e-Channel providers reported rarely referring learners to community supports.[CV] Reasons why are discussed in the subsection 6.6, which focuses on challenges related to e-Channel.

Assessments

The majority of e-Channel service providers indicated that they have an assessment strategy in place that includes:

- a suite of tools tailored to the learner's goal/level (5/5 providers);
- tools for initial, ongoing, and exit assessment by goal path (4/5 providers); and
- an indication of how the tools will be used and when (4/5 providers).[SPS]

Many e-Channel learners undergo an initial assessment (64% of past learners indicated they had an initial assessment[LS]; 3/5 of providers indicated all learners had an initial assessment[SPS]). It appears that e-Channel learners are less likely to undergo initial assessments when compared to in-person learners.[LS, SPS] One e-Channel provider has a very high proportion of blended learners and collaborates with in-person service providers in order to share intake assessment duties.[CV]

The main methods of ongoing assessment are class quizzes, tests, and assignments.[CV] Almost two thirds of learners indicated that they took tests to track their progress during their training, which is similar to the proportion of in-person learners.[LS] The majority of e-Channel learners reported receiving regular feedback on their training progress.[LS]

Providers are also implementing Milestones but mainly do so for accountability purposes as opposed to tracking learners' progress.[CV] On average, learners attempt 1.9 Milestones (compared to 2.7 for in-person learners), with 93% of learners successfully completing at least one Milestone (compared to 86% for in-person learners).[AD] One provider requires learners to successfully complete a Milestone before being able to complete a course.[CV]

Exit assessments are not generally part of e-Channel learning. Sites may administer Milestones to a learner at the end of a course, and some courses have final exams, but these are not administered at the end of the learner's e-Channel training, only at the end of a course.[CV] The

e-Channel provider that is part of the Learner Gains Research Project is the only site that administers a test at exit.[CV]

No e-Channel providers administer Culminating Tasks to learners as no Culminating Tasks have been developed for online administration.[CV]

Learner Plans

All e-Channel service providers indicated that they have a Learner Plan for all learners.[SPS] Approximately half of all e-Channel learners reported having a Learner Plan, about the same percentage as in-person learners.[LS] It is common for service providers to develop learner plans collaboratively with learners.[103,LS,CV]

Learner Plans include the learner's goal path, the competencies they will be working on, the associated Milestones, and, generally, the specific courses to be taken.[CV] All Learner Plans are tailored to the learner's goals in terms of the courses that the learner is enrolled in.[CV, SPS]

Providers have the option of creating their own Learner Plan form, or they can utilize the Learner Plan template created by the Ministry.[104] Regardless, providers are intended to have a Learner Plan separate from the Service Plan created in EOIS-CaMS.[105] All e-Channel providers indicated that learners have a Learner Plan that is separate from the EOIS-CaMS service plan.[SPS]

e-Channel providers review and update Learner Plans as the learner progresses, but the extent of this varies widely.[CV, SPS] For example, one provider reviews each Learner Plan once a week, while another provider only changes Learner Plans if a learner changes his or her goal or leaves the program for six months or longer.[CV]

---

[103] During consultation visits, three out of four e-Channel service providers said they developed learner plans collaboratively with learners while one provider said they give the learner the responsibility for developing their own learner plan. All e-Channel providers indicated they developed learner plans with learners in the service provider survey.

[104] MAESD. (2011). Learner Plan template instructions.

[105] MAESD. (2012). OALCF Q&A part 2.

> One site lets learners **develop their own Learner Plans**, because they feel learners who cannot do so lack the self-motivation necessary to succeed in online learning.[CV]

Training

e-Channel providers offer structured courses as the major method of training rather than the more tailored training that many in-person providers offer.[CV] Examples of courses offered range from foundational courses (e.g. math, communications, literacy, self-management, computer fundamentals) to more specialized courses (e.g. business math, introduction to Excel, driver's education, customer service).[CV]

Online courses are offered through electronic platforms such as Saba, Learnscape, Centra, Moodle, and Plato PLE.[CV]

Two providers mentioned that they offer courses on both a fee-paying and non-fee-paying basis.[CV] At one site, fee-paying learners are those learners who live outside of Ontario. At another site, fee-paying learners are those who wish to take a course immediately without having to wait for an e-Channel spot to open up. [CV] Fee-paying learners are not entered into EOIS-CaMS and are not included in reports submitted to the Ministry.[CV]

e-Channel providers integrate task-based and contextualized learning into their training activities. For example, one site offers courses on conflict resolution, customer service, and self-esteem, and another site offers a course on getting a driver's licence.[CV]

> "Courses are not tailored to the student....We develop courses to have a **broad appeal**."
>
> – e-Channel provider[CV]

Exit and follow-up

Learners stay in e-Channel for an average of two months (compared to eight months for in-person learners).[AD] Learners have a variety of reasons for exiting the program.[CV, LS] Learners and providers indicated that learners leave because:

- They are too busy with other things.[LS]

- Personal circumstances arose (health, family).[CV, LS]

- They achieved their goals.[CV, LS]

- They have limited access to a computer and Internet.[LS]

- The program was too difficult, or it was difficult to study alone.[CV, LS]

- The program was not meeting their needs or expectations.[LS]

- There was inactivity on the learning system (i.e. rules for how often a learner needs to log on or be in contact before the learner is removed from the system).[CV]

All providers indicated in the service provider survey that they do exit interviews with at least a proportion of their learners.[SPS, 106] One provider does exit interviews through an online exit survey followed by a telephone call if necessary.[CV] Another does exit interviews through email, but also resorts to texting, Facebook, phone, or other medium of communication if the learner does not respond to the email.[CV] e-Channel providers are more likely than in-person providers to conduct follow-up electronically.[CV]

According to e-Channel service providers, the proportion of learners successfully followed up with varied widely from provider to provider, from "almost all" to just 10%.[CV, 107] According to the learner survey, approximately half of e-Channel learners were successfully followed up with after leaving e-Channel (about the same percentage as in-person learners).[LS]

6.5 Learners and providers perceive e-Channel to be effective

e-Channel is **perceived as an effective delivery model for literacy training by learners and service providers** alike for particular learners. At a minimum, learners must have computer/Internet access and digital skills in order to use e-Channel.[CV]

---

[106] During consultation visits, one provider indicated exit interviews are not done at their organizatation.[CV]

[107] e-Channel administrative data was too incomplete to use to understand how frequently follow-ups were being done.

> "I signed up for in-class group computer class, but I didn't like it. The independent online thing [platform] was **much better**."
>
> – e-Channel learner[LDG]

Almost three quarters of service providers reported referring learners to e-Channel (73%).[SPS] The majority of service providers refer because they perceive that learners prefer blended learning (77%) or learners cannot come during hours of operation (73%).[SPS]

Service providers refer to e-Channel because...(n=171)[SPS]

Some learners prefer blended learning	77%
Some learners can't come during hours of operation	73%
Some learners live in remote locations	53%
There are courses not offered in our program	51%
Some learners are not comfortable attending classes	47%
Other	24%
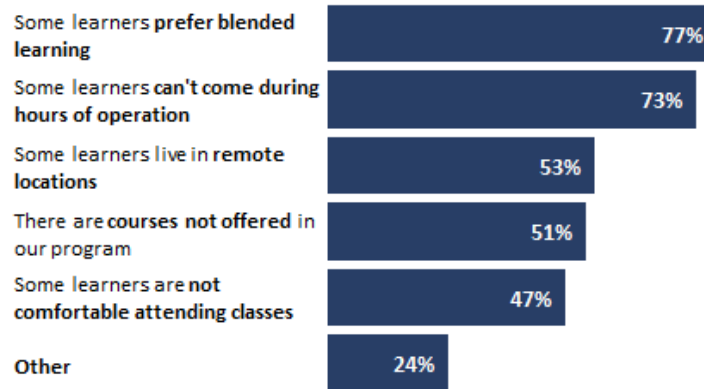
Generally, service providers appreciated that e-Channel learning is diverse, flexible, and supportive; supplements in-person learning; and is accessible.[SPS]

Some e-Channel learners felt that their literacy skills improved by participating in LBS.[LS] Aside from increasing literacy skills, the e-Channel learners also commonly reported increased confidence.[LS]

> "**Before, I could not communicate very well**, but now I can write emails in English, I can answer the phone, or make phone calls!"
>
> – e-Channel learner[LDG]

Overall, **e-Channel learners are satisfied and their needs are met**.[LS] The overall ratings for e-Channel are slightly lower than in-person training; however, these should be viewed with caution because two of the five e-Channels are overrepresented.[LS] Over three quarters of

learners felt e-Channel met their needs, that it was relevant to their goals, and that they received enough learning opportunities.[LS] Many e-Channel learners reported that e-Channel prepared them for their next steps and that their skills improved.[LDG, LS] A few learners reported that the courses were easy or convenient and also that the online platforms were straightforward to use.[LDG, LS] The majority of learners reported having no problems taking e-Channel courses.[LS]

Satisfaction: Comparing e-Channel to in-person[LS]
(% learners who agreed)

Relevancy of learning/ training to goals	e-Channel (n=365)	87%
	In-person (n=1, 154))	90%
Satisfaction with the quality of training		83%
		89%
Courses/training met needs		78%
		86%
Would recommend		87%
		91%
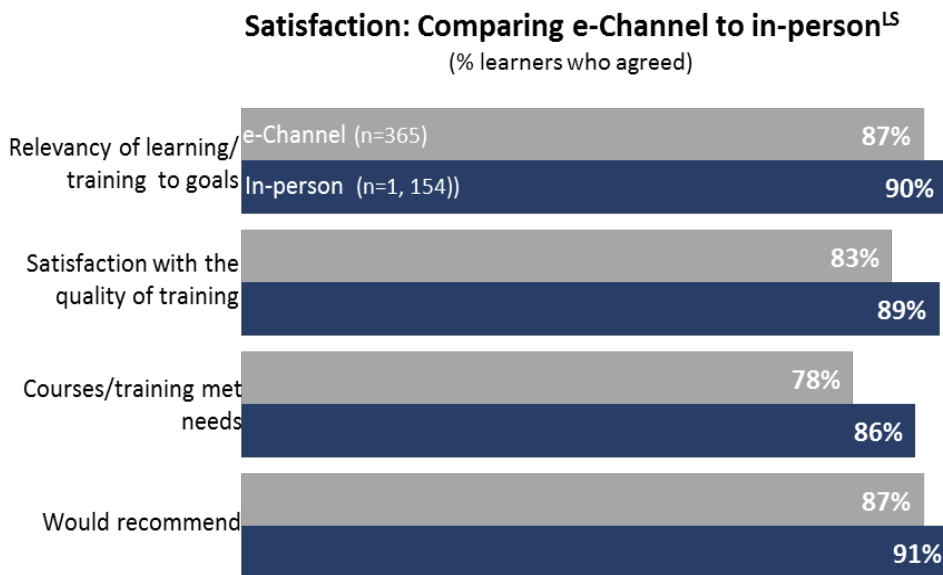
When asked about enablers of high-quality services, e-Channel providers commonly cited:

- dedicated and skilled staff with deep understanding of the unique needs of the population they serve;[CV, SPS]

- collaboration with in-person services, the MAESD, and other EO and ministries' learning programs;[CV, SPS]

- engaging courses (e.g. gamification, electronic badges[108]);[CV]

- updated technologies to provide e-Channel services;[CV, SPS] and

- adequate funding.[SPS]

---

[108] Gamification and electronic badges are discussed in more depth in Appendix B: Case study on e-Channel.

There are a few learners and service providers who do not perceive e-Channel to be effective

Though e-Channel is generally perceived as an effective service delivery model by the majority of service providers and e-Channel learners, **there were providers who do not agree**. Service providers do not refer to e-Channel for the following reasons:

- e-Channel may not be effective for learners with lower levels of literacy or weak computer skills, as staff are not physically present to help them access services.[CV, LS, SPI, SPS] The perception that low literacy skills are a barrier to online learning was the most common reason for service providers to not refer to e-Channel.[SPS]

- e-Channel may not be effective for learners who require more direct support or who lack self-direction.[LDG, LS, SPS, 109]

- 11% who do not refer were generally unsure that online learning was effective.[SPS]

- A few service providers and e-Channel learners felt that there is a lack of sufficient support for e-Channel learners and that there needs to be more personal contact and feedback from e-Channel mentors. They cited that learners may require more regular positive encouragement, may have questions about specific tasks, or may not be comfortable strictly using email as the main form of communication.[LDG, LS, SPS]

> "They come for social interaction … and **don't want to sit on the computer**. They spend a lot of time on those things already."
> – Service provider[SPS]

Recommendation E-1: Continue to fund e-Channel as a complement to, rather than replacement of, in-person instruction.

6.6 e-Channel faces unique challenges

e-Channel faces a number of unique challenges. **The PMF and OALCF were not specifically designed to apply to online learning services.** As a result, e-Channel providers experience special challenges with these initiatives, above and beyond the challenges faced by other LBS providers, such as difficulties in making meaningful referrals, challenges in administering

---

[109] More information on this topic can be found in Appendix B: Case study on e-Channel.

Milestones online, challenges in administering Culminating Tasks online, and challenges following up with learners who have exited the program.

Other more general challenges for e-Channel not related to the PMF or OALCF include a lack of integration with in-person services for blended learners, a lack of awareness about e-Channel among potential learners and service providers, and outdated platforms and associated technical issues.

Recommendation E-3: *Invest in efforts to increase awareness of e-Channel among service providers and potential learners.*

Recommendation E-6: *Invest resources in updating e-Channel platforms and reducing technical issues.*

The PMF and OALCF create challenges unique to e-Channel

Meaningful referrals are more difficult for e-Channel providers for at least three reasons. First, e-Channel learners are geographically dispersed across Ontario, making it difficult or impossible for staff to be aware of local services to refer learners.[CV] Second, the lack of face-to-face instruction makes it difficult to informally identify learners' barriers.[CV] Third, blended learners tend to rely on their in-person providers for referrals, removing the need for e-Channel providers to do so.[CV] As a result of these issues, e-Channel providers reported that they rarely refer learners to wraparound support services.[CV] This is also evident in the learner survey, where only 7% of e-Channel learners reported being referred to other services compared to 54% of in-person learners.[LS] In contrast, in-person LBS services are much better suited to identify learners' needs and make referrals as in-person services have more direct contact with learners and are also aware of the local services available to learners. e-Channel learners are often also attending in-person LBS services where in-person instructors have already identified and referred learners to the appropriate wraparound supports (before e-Channel providers might need to).[CV]

> "Understand that **e-Channel is and should be different** from in-person LBS."
>
> – e-Channel provider[CV]

Recommendation B-5: *Eliminate Service Coordination as an SQS element for e-Channel providers, in recognition of the high number of blended learners and the inherent difficulty that e-Channel providers have in providing referrals for their learners.*

There are fewer Milestones to choose from, and some are not adapted for an online environment. e-Channel providers encounter unique difficulties in administering Milestones to learners in a digitized environment:

- While Level 1 Milestones are available online, it is challenging to adapt Level 2 or 3 Milestones for an online platform.[CV]

- Milestones sometimes require the learner to have two computer screens. For example, one Milestone requires the learner to read a long document and then write their answer, but the computer screen does not allow the learner to view the text and write the answer at the same time.[CV]

- Milestones sometimes require instructor supervision, necessitating the instructor to be on Skype with the learner.[CV]

- Milestones sometimes require the learner to download a PDF to their desktop and then re-upload it to the site. The instructor must then trust that the learner has deleted the PDF off their desktop once they have completed the Milestone so that it cannot be shared with other learners.[CV]

Recommendation E-4: Support the full integration of Milestones into e-Channel's online platforms.

Culminating Tasks have not been fully integrated online. e-Channel providers reported difficulties in administering Culminating Tasks,[CV] as only three Culminating Tasks (all for the Employment goal path) have been developed for online administration. While 7% of in-person learners have completed a Culminating Task, just three e-Channel learners in total completed a Culminating Task.[AD]

Recommendation E-5: If Culminating Tasks continue as part of the OALCF, ensure that they are fully deployed on e-Channel's online platforms. Do not implement Completion of Goal Path among e-Channel providers until and unless Culminating Tasks are fully integrated into online platforms. Alternately, remove Culminating Tasks as a component of the Completion of Goal Path measure.

Follow-up is difficult to achieve, with e-Channel providers encountering challenges in conducting 3-, 6-, and 12-month follow-ups. In addition to difficulties identified by in-person LBS providers (e.g. learners are transient, questions are intrusive, contact information changes), e-Channel providers indicated the following additional challenges:

- Given higher learner-to-trainer ratios, following up personally by telephone is very time consuming.[CV]

- Blended learners may be contacted twice, once by their in-person provider and once by the e-Channel provider, and are reluctant to give information twice.[CV]

- Since learners are geographically spread out across the province, once contact with the learner has been lost, it is not possible to re-establish contact with them. For example, one e-Channel provider said, "It's worse for online learning because it's easier for them to disappear. You aren't going to see them at the grocery store."[CV]

One support organization summarized the difficulties as follows:

While in-person programs may also have difficulty following up with learners, they can also run into a learner at the coffee shop or grocery store, or have somebody who knows somebody to tell them that they moved. But for e-Channel, that's not going to happen and it's unfair to give them the same responsibility….This is a different environment so learners are available in different ways, and you can't necessarily achieve the same kind of contact with them as you could in in-person programs.[SOI]

> "The nature of the online beast is that they can be **here today and gone tomorrow**."
> – e-Channel provider[CV]

e-Channel is not well integrated with in-person services

e-Channel providers expressed concerns about **duplicated efforts and lack of coordination** for blended learners:

- The learner must register for both in-person services and e-Channel services separately.[CV]

- Providers may need to enter the learner into EOIS-CaMS twice (once by the in-person provider and once by the e-Channel provider).[CV]

- Providers must create two Learner Plans (one for in-person and one for e-Channel).[CV]

- Providers must follow up twice at three, six, and 12 months after exit (total of three times by the in-person provider and three times by the e-Channel provider).[CV]

- In-person providers are unable to view a learner's e-Channel activities in EOIS-CaMS, and e-Channel providers are unable to view a learner's in-person activities.[CV]

- Although initial assessments can be coordinated between the in-person provider and the e-Channel provider,[110] this is not always done.[CV]

- Although an in-person provider and an e-Channel provider can share credit for a learner's achievement of a Milestone or Culminating Task,[111] this does not appear to be well known. For example, e-Channel providers expressed concern that learners need to undertake twice as many Milestones and Culminating Tasks in order for both service providers to meet their SQS requirements.[CV]

- Although both the in-person provider and the e-Channel provider are credited with a learner served for a blended learners, there is still some competition around retaining learners: of those service providers who do not refer learners to e-Channel, 8% do not refer because it negatively impacts their site's enrolment numbers.[SPS]

There are learners who take courses from more than one e-Channel provider.[AD] If these learners are also accessing in-person LBS services at the same time, the process is tripled.[CV]

Deaf Learn Now (the Deaf stream e-Channel provider) is the exception to the rule: it works closely with Deaf stream in-person providers to avoid duplication wherever possible, such as in initial assessments.[CV]

Recommendation E-2: Better integrate e-Channel services with in-person services for blended learners in order to reduce competition and duplication of efforts.

Awareness of e-Channel could be strengthened

Some service providers who do not refer learners to e-Channel (26%) reported that they **do not know enough about e-Channel to make a referral**.[SPS] This is especially the case in the College sector: 58% of colleges who do not refer to e-Channel said it was because they do not know enough about e-Channel.[SPS]

Support organizations and Ministry staff also believe that there is a **lack of awareness among learners** about what services are available to them.[MI, SOI] They indicated that e-Channel has the potential to reach more learners if more resources were invested in marketing and branding.[MI, SOI] One support organization suggested rebranding e-Channel with a new, more intuitive name that emphasizes what the service can offer.[SOI]

---

[110] MAESD. (2014.) Clarification regarding the administration of Milestone and Culminating Task assessments for learners accessing multiple LBS sites.

[111] MAESD. (2014.) Clarification regarding the administration of Milestone and Culminating Task assessments for learners accessing multiple LBS sites.

e-Channel platforms are outdated

Support organizations, service providers, and e-Channel learners indicated that **e-Channel services run on slow, outdated platforms and have various technical issues**.[CV, LDG, SOI] This sometimes acts as a barrier to learners completing their learning activities. For instance, one learner indicated continuing from one slide to the next and exiting lessons can be very slow:

If you are reading a passage and a question on one slide, and the question/answer may be on the next slide, moving to the next slide can take a long time, and by the time you get there, you have forgotten the passage/question, but can't go back.[LDG]

In addition, one site would like to make it possible for learners to submit a presentation in video format as a class assignment, but this is not possible on its current platform.[CV] According to this provider, overhauling an online course (including updating the course content and upgrading the technology) costs approximately $50,000.[CV]

6.7 Conclusions

e-Channel is implemented similarly to in-person services in that it follows the same service delivery pathway (from information and referral to exit and follow-up). However, there are differences in online learning that require acknowledgment by the Ministry, particularly in relation to the PMF and OALCF, which present genuine difficulties for e-Channel providers (e.g. service coordination). Other challenges unique to e-Channel include a lack of integration with in-person services for blended learners, a lack of awareness about e-Channel, and outdated platforms.

e-Channel is an effective, lower-cost, viable method of providing LBS services to certain learners. e-Channel costs approximately three times less per learner than in-person services. It is perceived as an effective delivery service model for literacy training by learners and service providers alike. e-Channel cannot, however, serve as a replacement for in-person services as it is not accessible for all learners. Instead, e-Channel is well suited to complement in-person LBS training, through blended learning for some learners and as a stand-alone option for others.

7 How effectively do LBS support organizations conduct LBS service development and support OALCF implementation?

7.1 Introduction

This chapter provides an overview of the support organizations' role and effectiveness.

Support organizations help service providers to achieve the objectives of the LBS program. They undertake activities in four service categories:

1. Support seamless client pathways across EO and other departments.

2. Support quality service delivery by providing resource development and support (including instructional content, mode of instruction, and assessment).

3. Support the improvement of service provider organizational capacity.

4. Support the collection and distribution of research findings and contribute to regional, sector, or stream perspectives to LBS-related research projects.[112]

In addition, "regional network" support organizations play a role in the identification of community needs through the Literacy Service Planning and Coordination process, and "service" support organizations provide specialized technical and publishing supports.[113]

In examining the effectiveness of support organizations, it was not possible to directly measure support organizations' impact on the quality of service provision in the field. Instead, this chapter uses a proxy: the extent to which service providers report relying on support organizations to effectively deliver their programs.

Based on this proxy, this chapter concludes that support organizations are effective overall in conducting service development and supporting the implementation of the OALCF. However, support organizations encounter problems in supporting service providers in areas requiring greater authority and coordination than they currently possess (such as the PMF and EOIS-CaMS), pointing to the need for either stronger leadership from the Ministry or a more empowered and consolidated support organization network.

---

[112] MAESD. (2016). LBS: Support organization program guidelines.

[113] MAESD. (2016). LBS: Support organization program guidelines.

7.2 Support organizations are organized by sector, stream, catchment area, and service

The **LBS program included 27 support organizations in 2015-16**.[114] One support organization closed since the previous fiscal year (Essential Skills Ontario, which supported the Anglophone stream).

The 27 support organizations have mandates that are organized by sector, stream, catchment area, and service.[115] They are comprised of:[116]

- Three **sector** support organizations (College, School Board, and Community Agency);

- Three **stream** support organizations (Aboriginal, Francophone, and Deaf);

- 16 **regional networks** (each of which serves a regional catchment area); and

- Five **other** support organizations (including publishing and technical supports and Laubach Literacy Ontario).

The following page shows the network of LBS support organizations in 2015-16 (including the now-defunct Essential Skills Ontario). The circles are sized by budget and organized by type.[117]

---

[114] MAESD. (2016). LBS expenditures for support organizations 2014-15 to 2015-16 spreadsheet.

[115] MAESD. (2016). LBS: Support organization program guidelines.

[116] MAESD. (2016). LBS Expenditures for Support Organizations 2014-15 to 2015-16 spreadsheet.

[117] MAESD. (2016). LBS Expenditures for Support Organizations 2014-15 to 2015-16 spreadsheet.

Stream-based

Deaf Lit. Initiative
$101,250
(Deaf)

Essential Skills Ontario
$155,000
(Anglophone)

Ontario Native Lit. Coalition
$120,600
(Aboriginal)

COFA
$236,000
(Francophone)

Other

AlphaPlus
$616,177
(effective use of digital technology)

Laubach Lit. Ontario
$100,000
(Laubach method)

Ningwakwe Learning Press
$120,419
(Aborig. press)

Centre FORA
$244,850
(Francophone press)

Contact North
$461,500
(e-Channel technical support)

Sector-based

CLO
$78,827
(Comm. Agencies)

CESBA
$83,413
(School Boards)

CSC
$69,212
(Colleges)

Northern region

Literacy Northwest
$114,292

Mid North Network
$110,000

Literacy Network Northeast
$100,000

Regional networks

Western region

Project READ Lit. Network
$87,000

QUILL Network
$87,000

Tri-County Lit. Network
$87,000

Lit. Link Niagara
$85,000

Literacy Link South Central
$137,000

Adult Basic Education Assoc.
$85,000

Eastern region

Lit. Link Eastern Ontario
$110,000

Lit. Ontario Central South
$89,197

Ottawa Community Coalition for Lit.
$123,800

Central region

Simcoe/ Muskoka Lit. Network
$79,750

Lit. Network of Durham Region
$75,163

Metro Toronto Movement for Literacy
$119,163

Peel-Halton-Dufferin Adult Learning Network
$84,327

Because of this organizational scheme, **each service provider is served by several support organizations**. For instance, a Francophone community agency in Toronto could seek assistance from:

- COFA, the Francophone support organization;

- Community Literacy of Ontario (CLO), the Community Agency support organization;

- The Metro Toronto Movement for Literacy, the regional network for Toronto;

- Centre franco-ontarien des ressources en alphabétisation (Centre FORA), a support organization that publishes literacy resources in French; and/or

- AlphaPlus, for support in using digital technologies effectively.

There are patterns to the kinds of support organizations that providers turn to for help. Based on answers to the service provider survey question "Where do you get information about the LBS training needs of your community?",[118] it is evident that:

- **Non-Anglophone streams** (Francophone, Deaf, and Aboriginal) tend to rely more on their stream support organizations and less on regional networks.[SPS] This may reflect the unique needs of these streams[SPI] and the perception that regional networks are run mainly by Anglophone staff.[119] For instance, one Francophone provider referred to the regional networks as "English regional networks."[SPI]

- **e-Channel** providers conduct their own needs assessments rather than relying on regional networks.[SPS] This is because e-Channel providers serve learner populations that are defined by sociolinguistic background and learner goals, not by geography.[CV] Two e-Channel providers (F@D and ACE Distance) are run by stream support organizations, giving those providers direct access to information about the needs of the sociolinguistic community that they serve.[CV]

- **Colleges** rely heavily on their sector support organization (the CSC), while school boards and community agencies rely less heavily on their sector support organizations[SPS] for reasons that were not immediately clear.

---

[118] Respondents appear to have interpreted "community" in a broad sense, encompassing not just communities defined by geography but also communities defined by characteristics such as enrolment in the College sector of LBS.

[119] No regional network lists its preferred language of communication as French or ASL.

7.3 Support organizations help the field adapt to the PMF, EOIS-CaMS, and the OALCF, and contribute to service coordination

Support organizations reported that service providers most commonly ask for supports related to the PMF, EOIS-CaMS, OALCF-relevant teaching materials, and service coordination and promotion.[SOI]

Assistance with the PMF

Support organizations reported that they **frequently provide advice to providers about how to achieve SQS standards as well as clarification about reporting requirements**.[SOI] This is done through individualized one-on-one coaching of providers as well as province-wide efforts such as the creation and dissemination of SQS "tip sheets" by the Learning Networks of Ontario (LNO), a consortium of regional networks.[SOI]

These supports are often geared towards helping providers meet their SQS standards, rather than improving service delivery per se. A regional network interviewee reported:

Service providers now call on me to help them find ways to complete even more Milestones, even more clients participating in Milestones, in order to improve the numbers they report. I'm now frequently being brought in in order to troubleshoot on, for instance, how to get the [Completion of] Goal Path statistics to work. It's sad really, because it's not about client service, it's all about how I can jam the client into this narrow little prescriptive measure….We are constantly looking at ways to help the programs exploit the system so that they can survive.[SOI]

> "It's sad really, because **it's not about client service**….We are constantly looking at ways to help the programs **exploit the system** so that they can survive."
> – Regional network director[SOI]

As an example, the SQS tip sheets created by the LNO include tips that arguably increase a site's SQS scores without improving service, such as:

- "Be … strategic at the beginning of the fiscal year – remember that … a learner needs to complete a milestone in the current reporting period (fiscal year) for it to count."[120]

- "Us[e] activities with language that is similar to the Milestone language."[121]

- "Us[e] a 'mock' or 'mirrored' C[ulminating] T[ask]" to prepare learners for the real Culminating Task.[122]

Assistance with EOIS-CaMS

EOIS-CaMS supports are not part of the mandate of support organizations,[123] nor are support organizations well positioned to offer assistance in this area since they lack access to the EOIS-CaMS platform[SOI] and have no authority to decide how data entry should be done.

Nonetheless, **support organizations reported that service providers frequently ask for assistance with EOIS-CaMS**, including technical support and guidance on definitions.[SOI] For instance, one support organization interviewee said, "I get into the weeds of the [EOIS-CaMS] technical manuals so that [providers] don't have to have that level of understanding."[SOI]

Development of resources that align with the OALCF

Support organizations reported that they are frequently called upon to support the ongoing implementation of task-based, transition-oriented programming that aligns with the OALCF.[SOI] In the words of one support organization interviewee, "We are at a place where we understand the OALCF framework very well, and we can start to become really creative in our offerings."[SOI] These offerings include, for instance:

- task-based teaching materials, such as the QUILL task portal,[124] "targeted training" resources,[125] and material that prepares learners for specific in-demand occupations;[SOI]

- assessment supports, such as information about which initial assessments are most suitable for particular types of learners[SOI] and finding ways to get more learners to achieve Milestones in order to bring up Learner Progress scores;[SOI] and

---

[120] LNO. (nd). Tip sheet – Learner Progress.

[121] LNO. (nd). Tip sheet – Learner Progress.

[122] LNO. (nd). Tip sheet – Completion of Goal Path.

[123] MAESD. (2016). LBS: Support organization program guidelines.

[124] QUILL (Quality In Lifelong Learning) Learning Network. (nd). Task portal.

[125] LNO. (nd). Targeted training in Ontario through LBS.

- goal path supports, such as short, plain-language versions of the goal path descriptions for specific audiences (e.g. service providers, learners, and employers).[SOI]

Aligning LBS programming with the OALCF has been a major focus of research and development projects funded by the Ministry through the Service Delivery Network Development Fund (SDNDF). Before 2015-16, SDNDF funding was available to LBS support organizations as well as organizations outside of LBS through a competitive process. In 2014-15, of the 29 SDNDF-funded projects conducted by LBS support organizations, about half included a major focus on alignment with the OALCF.[126] These projects included, for instance:

- training service providers to incorporate digital skill building in LBS services,

- training service providers to use the Common Assessment for the OALCF Goal Paths Resource Package, and

- creating French and Deaf versions of an e-Channel course.

One regional network director described her organization's role in research and development as follows:

We're kind of like the head office of a franchise. We come up with products, services, ideas, and marketing, and then the franchises [service providers] decide [whether to adopt them].[SOI]

Support organizations expressed frustration that SDNDF funding is no longer available.[SOI] It is not clear what impact this will have on further development of task-based teaching resources, provision of service provider training, and alignment of LBS services with the OALCF.

Service coordination and promotion

Regional network directors stated that their organizations have an **important function to play in information, referral, promotion, and service coordination** for the LBS program.[SOI] For instance, one regional network director explained:

> "I'm the **point person** for all things literacy."
>
> – Regional network director[SOI]

---

[126] MAESD. (2015). Summary of 2014-2015 SDNDF projects.

I'm the point person for all things literacy….The service providers don't have time to research, to reach out to the community, to collate or collect best practices, to do the administrative piece that goes along with service coordination….My role is to do all those things that they don't have time for. Because I don't have program responsibilities, I can be out in the community much more often and to a greater extent than the service providers, who spend their time teaching. I act as a spokesperson for all literacy programs in the community, including at any community roundtable – for example, immigration, housing, community development, poverty, housing security, food. I'm the one who represents the collective interests of all the literacy programs.[SOI]

Another regional network emphasized that regional networks are uniquely good at service coordination because they are impartial:

We come without an agency-specific agenda. We represent all of the agencies….We make sure people get to the right door versus a service provider may want to keep a learner because they get funding for that learner.[SOI]

The **Literacy Service Planning and Coordination process was a commonly cited technique for promoting service coordination**.[SOI] Regional networks bring together all of the LBS service providers in their catchment areas as well as community partners that serve LBS learners or have a stake in the community's literacy needs. These partners include a variety of organizations focused on employment, health (including mental health and substance use issues), social assistance, education, social services (e.g. housing organizations and food banks), newcomer services (including ESL), and workforce development.[CPI, CV, SOI, SPS] This process identifies the community's training and employment needs, finds appropriate niches for particular providers, reduces duplication and competition, and ensures that relevant services are aware of what LBS can offer to their clients.[MI, SOI, 127] The results of this process are delivered annually to the Ministry as an LSP for each catchment area. One regional network director described the LSP as "our biggest deliverable."[SOI]

Support organization interviewees also support service coordination by sitting on committees and working groups, doing research and project work, and creating referral protocols and directories.[SOI]

7.4   Service providers rely on support organizations

Providers consistently reported that they rely on the resources and assistance provided by support organizations for both learning materials and professional guidance.[CV, SPI, SPS] In the

---

[127] MAESD. (2016). LBS: Support organization program guidelines.

service provider survey, when asked to share up to three resources that were most helpful, service providers mentioned resources from support organizations much more often than any other source (see following chart).[SPS, 128] Interviews and consultation visits revealed the same.[CV, SPI]

---

[128] In comparison, few sites reported using teaching materials provided by the Ministry,[CV, SPI, SPS] and instructors at sites did not report getting professional guidance from the Ministry.[CV]

Sources of resources that providers find to be particularly helpful[SPS]

Source	% of resources that come from this source	Examples
Support organizations	45%	COFA online resources, AlphaPlus online resources, ESKARGO resources, task-based activities, webinars
MAESD	10%	Report 61, Report 64, goal path descriptions, curriculum framework
Service providers	9%	Bridging to Deaf success resources, webinars, assessment guides, OALCF documents
Published materials	8%	Math Sense Series, Active Reader Series, GCF Learn Free resources, Aztec Learning, Challenger Reading Series
Other	8%	Free online resources, correspondence courses

Providers were positive about support organizations, stating:

If I need something I give [my regional network] a call….They are the 'go to' people.[SPI]

[The person] who runs [our regional network] is phenomenal. He's always up on the new thing, very passionate….The regional networks keep us connected. We are so busy and we would stay in our silo if not for the regional networks.[CV]

[Support organizations] put out resources. They provide training for us. They gather information about where our needs are and what the Ministry is doing. They will do training specific to what we need. For example, they have done workshops on mental health, using the OALCF, and partnering with other organizations and Employment Services.[SPI]

To keep abreast of community needs, most service providers reported using the LSP (76%) and the planning discussions/meetings (78%) conducted by their regional network.[SPS] One provider reported:

We meet on an approximately bimonthly basis with [name of regional network] in a roundtable format to discuss what's going on. That's when we put together our Literacy Service Plan for

the year. We build that together and approve it together. From attending those meetings, we know exactly what's going on.[SPI]

Many providers (52%) also relied on their sector support organization to keep abreast of the needs of their learners, and some (31%) relied on their stream support organization.[SPS]

There appear to be high levels of trust between providers and support organizations,[CV, SOI, SPI, SPS] which makes it easier for support organizations to provide effective supports. A few support organizations pointed directly to this high level of trust as a major enabler of the work they do:[SOI]

Programs trust us. They know we have their best interest in mind.[SOI]

They just tell me what their needs are. I don't need to ask….They are really honest about their problems with me.[SOI]

7.5 Support organizations are asked, but not allowed, to fill a leadership role

Support organizations **are often asked for assistance that they are not intended to, or able to, provide**. This is the case of two of the most common supports that support organizations are asked for, namely EOIS-CaMS and the PMF.[SOI] Support organizations have trouble providing assistance in these areas for the following reasons:

- They **lack access**. Support organization staff do not have access to the EOIS-CaMS platform,[SOI] making it difficult to provide technical support to providers.[SOI] They also lack direct access to EOIS-CaMS data that might help them to provide evidence-based suggestions for raising a site's SQS scores.

- They **lack authority**. Support organizations are not empowered to, nor intended to, decide what the definitions of variables on EOIS-CaMS ought to be, what data entry practices are allowed and disallowed, or what count as legitimate ways to meet SQS standards as opposed to illegitimate behaviours to 'game the system'.

- They **lack coordination**. Support organizations are fragmented into 27 separate organizations with no hierarchical structure and no mechanism in place for their materials to be critically reviewed and approved by the Ministry.[MI] This, and the fact that each provider can turn to at least four support organizations for help, virtually guarantees that advice will be inconsistent across sectors, streams, and regions. Some of the support organization interviewees pointed to inefficiencies including overlapping mandates, competition over funds, and a lack of coordination:[SOI] "It is not clear to the funder or the field who can or does do what."[SOI] The loss of Essential Skills Ontario has made it more difficult to coordinate between support organizations according to a few support organization directors.[SOI]

Recognizing this issue, support organizations have engaged in ad hoc initiatives to coordinate their services.[SOI] The largest example of this is the LNO, an ad hoc, unfunded umbrella organization for all 16 regional networks that meets at least once per year and shares a website.[SOI, 129] Regional network interviewees spoke highly of the LNO, noting that it allows cost savings and coordination through hosting a common website, and builds connections through which to share best practices.[SOI] There are also smaller ad hoc umbrella organizations for regional networks such as the Networks of Ontario East and the Learning Networks of Ontario Western Region.[SOI, 130]

However, these amalgamated entities lack funding, official recognition, or any authority to make decisions. For instance, the LNO created tip sheets for providers to help them increase their SQS scores, but these tip sheets are not Ministry approved and therefore do not provide authoritative guidance.

Despite these difficulties, responsibility for EOIS-CaMS and PMF support frequently falls on the support organizations.[SOI] This is because **providers do not feel they are receiving adequate supports in this area from the Ministry**[CV, SOI, SPI, SPS] (see chapter 11, which focuses on the effectiveness of the Ministry support and funding structures). This leaves a gap that support organizations struggle to fill. Providers are also anxious about revealing areas of difficulty to their ETCs, and prefer to share their concerns with support organizations (which have no power to curtail funding).[CV, SOI, SPI, SPS] For instance, a service-based support organization director reported that they have become a confidante to providers and trusted intermediary between them and the Ministry:

We have asked providers to tell us about issues confidentially. For example, we shared concerns with TCU about Culminating Tasks which were raised confidentially by members.[SOI]

Recommendation A-2: Explore possibilities for centralized, consolidated, and consistent LBS leadership (leadership includes administration, program development, analysing and interpreting data, providing guidance to the field, ongoing consultation with the field, and offering overall vision). LBS leadership could be consolidated into a single body within or outside of the Ministry.

---

[129] LNO. (nd). LNO website.

[130] Another area of support organization consolidation and efficiency is in e-Channel. Two e-Channel providers (F@D and ACE Distance) are run by LBS support organizations, giving those providers direct access to information about community needs and avoiding duplicating the work of reaching out to communities across the province. This is a logical and efficient set-up, since both support organizations and e-Channel providers have clientele across the province rather than confined to a specific geographical area.[CV]

Recommendation F-5: Provide greater EOIS-CaMS data access to support organizations to ensure that they are able to support community-level planning for the LBS organizations they support. Build capacity among support organization staff to make the best use of this data.

7.6 Conclusions

Support organizations are important to the LBS program and to the service providers. With no day-to-day responsibilities for learners, support organization staff have time to develop and pilot innovative materials and keep an eye on the wider community and evolving best practices in the adult literacy field. Service providers rely on them for a variety of important supports, including the continuing efforts to align service provision with the OALCF.

Service providers have also, however, **come to rely on support organizations for leadership that they are not intended to provide.** If support organizations are to fill this role, they must be given the access, authority, and coordination required to do so. Conversely, if they are not to fill that leadership role, it must be filled more effectively by the Ministry.

8 To what extent is the program achieving or demonstrating progress towards intended participant outcomes?

8.1 Introduction

This chapter outlines the extent to which LBS is progressing towards intended immediate, intermediate and long-term outcomes for participants.

LBS aims to increase participant outcomes in the following areas[131]:

Immediate outcomes	Intermediate outcomes	Long-term outcomes
Learners experience programming as relevant/meaningful Learners move easily across ministry programs **Learners make progress (improve their literacy and essential skills) and gain competencies** **Learners complete goal path requirements** Training matches/addresses participant's and/or provincial/territorial needs/priorities	**Learners successfully transition to employment, postsecondary, apprenticeship, secondary school, and increased independence** Learners move to further education/ training that represents progression toward employment	Enhanced learners' employability and labour market participation/ attachment **Increased learners' participation and engagement in community, social, and political processes** Employment and training services align with labour market development needs and priorities Enhanced population's competencies and proficiency in key information-processing skills leading to improved economic and social well-being and health

This evaluation focused on the outcomes listed in **bold**.

---

[131] MAESD. (2015). LBS logic model.

Based on learner outcome data and stakeholder perceptions, the LBS program is achieving the intended outcomes.[132] The majority of learners felt their literacy and basic skills improved as a result of participating in the LBS program, as did their confidence. Learners are successfully completing Milestones and goal path requirements, and they feel that the training prepares them for their next steps.

Some learners are successfully transitioning to their next steps. Specifically, learners in the Employment and Apprenticeship goal paths are gaining employment in the year after exiting the program. Learners in the Postsecondary Education goal path are returning to school upon exiting the program and remaining there for the following year. Learners in the Secondary School Credit goal path are also returning to school upon exiting the program, with some transitioning into employment within the year after exiting the program.

Learners have also become more engaged in their community, achieving greater social integration and civic engagement.

8.2 Immediate outcome: Learners' literacy and basic skills have improved

The majority of learners felt that their literacy and basic skills improved as a result of participating in LBS training and that the training prepared them for their next steps.[LDG, LS]

The majority of learners (85%) across all sectors, streams,[133] and regions **reported that their skills improved** as a result of LBS training,[LS] which is in line with results from the 2011 evaluation of the LBS program (88%).[134]

---

[132] It should be acknowledged that learning outcomes are largely based on self-report data. Moreover, the causal role of LBS in these outcomes cannot be established for certain. However, triangulation from multiple sources (learners' self-reported outcomes and the perceptions of learners and service providers) gives us confidence in the results.

[133] Learners in the Deaf stream were not included in this analysis as there were very few respondents.

[134] Deloitte. (2011). Evaluation of the LBS program.

85% of learners agree their skills improved as a result of LBS training (n=1,149)[LS]
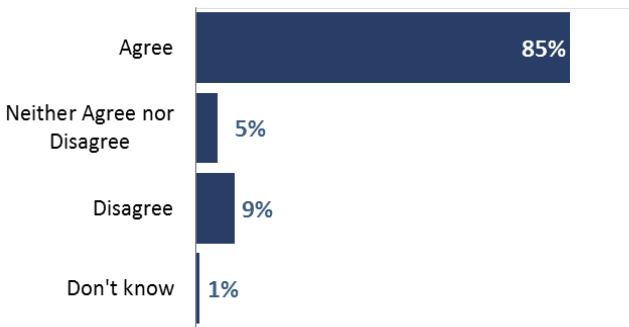
The following skills were commonly mentioned:[LDG]

- Reading
- Grammar
- Digital literacy
- Writing
- Writing emails
- Interpersonal skills
- Time management
- Organizational skills
- Teamwork
- Goal setting
- Problem solving
- Budgeting
- Making phone calls

The majority of learners across all sectors, streams,[135] and regions also agreed that they could apply the skills they learned **in their day-to-day lives**.[LS]

---

[135] Learners in the Deaf stream were not included in this analysis as there were very few respondents.

> "I didn't get my schooling in Jamaica. I was not able to attend, because they beat me to get me to learn. When I came to Canada, I could only read my name. Now I can read."
> – Learner[LDG]

Service providers also indicated learners improved their skills. Across all sectors, regions, and streams, the majority of service providers (95%) indicated that either most or all of their learners make meaningful improvements in literacy and essential skills.[SPS]

> "I'm learning how to manage my budget – working with what we have…It's easier now. **We can get through the month**."
> – Learner[LDG]

Most **learners are successfully completing Milestones.** On average, learners are successful in completing 84% of the Milestones they attempt. Of the learners who were in the program between April 1, 2012 and March 31, 2014, 86% had successfully completed at least one Milestone Task by the time they exited the program.[AD]

8.3 Immediate outcome: Many learners are completing their Learner Plans

At program exit, over half of learners (59%) had successfully completed all of the "goal path-required learning activities" (as determined by their instructors).[AD, 136] This is comparable to the completion levels found in the 2011 evaluation of the LBS program (57%).[137]

---

[136] Note that this is not the same as the PMF measure of Goal Path Completion, which also requires completion of a Culminating Task.

Of the past learners who left the program before completing it[138]:

- 45% left for personal reasons (health, family, too busy);

- 29% left because they had achieved their goals (got a job, returned to school);

- 27% left because of challenges with the program (too difficult, not what they expected, didn't like it, hard to get to, weren't getting what they needed); and

- 7% left for other reasons.[LS]

8.4 Intermediate outcome: Learners feel prepared for their next steps

Most learners (83%) felt the training prepared them to take the next steps toward their goals.[LS] The majority of service providers (87%) also believed the training was preparing most or all learners for their transition to next steps.[SPS]

## 8.5 Intermediate outcome: Learners make gains in education and employment

As shown in the following graphic, **learners made gains in both employment and education**.

---

[137] Deloitte. (2011). Evaluation of the LBS program.

[138] Surveyed learners were asked if they left the training before completing it. Therefore, this information is based the learners' perception of program completion.

Outcomes for all learners
(n=31,475)[AD]
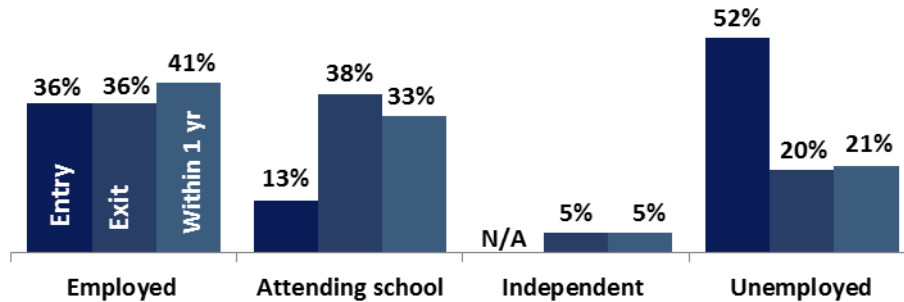
Figures include only past learners with information at all three points in time (complete information was available for 64% of learners who have completed the program).

Follow-up information was gathered within one year of exit (if a learner had multiple follow-ups, the most recent information was used).

The percentage of learners in school increased from 13% when they began LBS training to 38% when they exited the program. This means that 25% of learners went back to school after taking part in the LBS program.

Employment levels stayed the same from program entry to exit (36%) but then increased to 41% within the year after exit, indicating that an additional 5% of learners gained employment.

These results are similar to those found in the 2011 LBS program evaluation,[139] with the exception that more learners are employed now (both before and after their LBS training).

The learner survey, conducted in January-March 2016, provides more up-to-date information about learners' current activities. It suggests that employment outcomes continue to improve with time. Overall, over half of past learners (51%) reported that they are working, and 55% of these individuals are employed full time.[LS] In addition, 23% said they are in school (58% of these are attending college).[LS, 140]

---

[139] Deloitte. (2011). Evaluation of the LBS program.

[140] There was overlap between those in school and the learners working. In total, 9% of past learners are both working and in school.[LS]

Among past learners who were employed both before and after the LBS program, many indicated that the *quality* of their employment had improved. 58% of past LBS learners who are currently working reported they got a better job since they began their LBS training.[LS] This translates to approximately 30% of all past learners surveyed.[LS]

8.6 Intermediate outcome: Some learners are reaching their goals

When broken down by goal path, gains in employment and education are much more evident, and outcomes are strongly correlated with the goal path a learner is in. For example, learners in the Postsecondary goal path have much stronger outcomes in school enrolment than they do in employment.

Learners in Apprenticeship and Employment goal paths make substantial gains in employment

Learners in the Employment goal path made substantial gains in employment. 40% of learners were already employed when they began LBS training. By the end of LBS training, this increased to 53% and then further increased to 58% within one year of exiting the LBS program.[AD] There were also gains in school enrolment for those in the Employment goal path. The percentage of learners enrolled in school tripled from 6% to 18% by the end of LBS training.[AD]
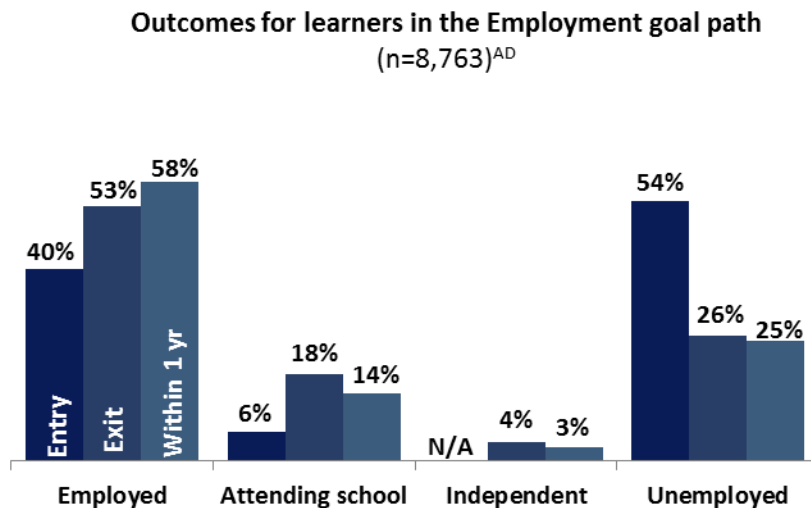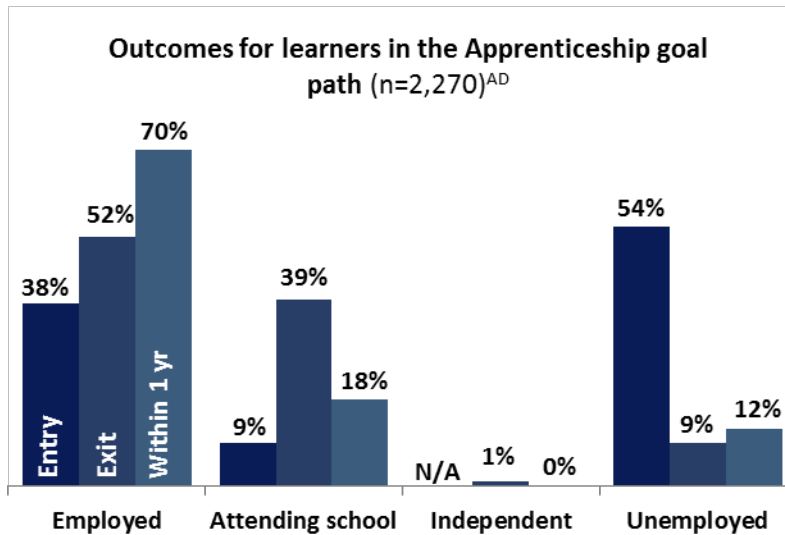
Outcomes for learners in the Employment goal path
(n=8,763)[AD]

Outcomes for learners in the Apprenticeship goal path (n=2,270)[AD]

Figures include only past learners with information at all three points in time (complete information was available for 64% of learners who have completed the program).

Follow-up information was gathered within one year of exit (if a learner had multiple follow-ups, the most recent information was used).

Learners in the Apprenticeship goal path made even larger gains in employment (overall increase of 32% from entry to follow-up). Gains in school enrolment were also impressive, more than quadrupling from entry to the time of exit (9% to 39%) and then decreasing to 18% within one year of exiting the program.[AD]

Learners in Postsecondary Education and Secondary School Credit goal paths return to school

Many learners in the Postsecondary Education goal path returned to school. The percentage of learners going back to school tripled from entry (18%) to exit (55%). The employment rates increased overall as learners left their jobs to go back to school.[AD]

Outcomes for learners in the Postsecondary goal path
(n=12,621)[AD]

Chart: Employed — Entry 39%, Exit 29%, Within 1 yr 31%; Attending school — Entry 18%, Exit 55%, Within 1 yr 53%; Independent — N/A, Exit 1%, Within 1 yr 1%; Unemployed — Entry 44%, Exit 15%, Within 1 yr 15%

Outcomes for learners in the Secondary School goal path (n=4,185)[AD]
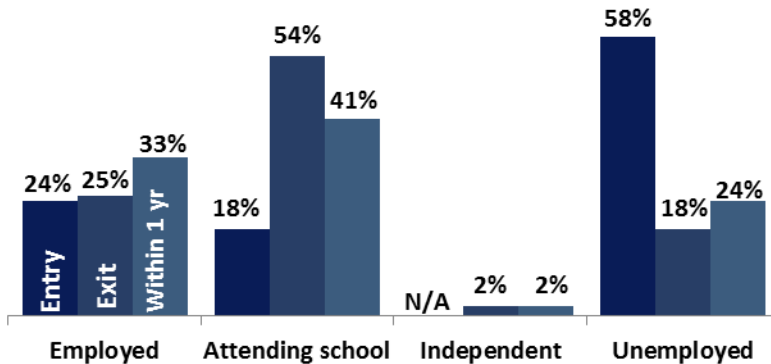
Chart: Employed — Entry 24%, Exit 25%, Within 1 yr 33%; Attending school — Entry 18%, Exit 54%, Within 1 yr 41%; Independent — N/A, Exit 2%, Within 1 yr 2%; Unemployed — Entry 58%, Exit 18%, Within 1 yr 24%

Figures include only past learners with information at all three points in time (complete information was available for 64% of learners who have completed the program).
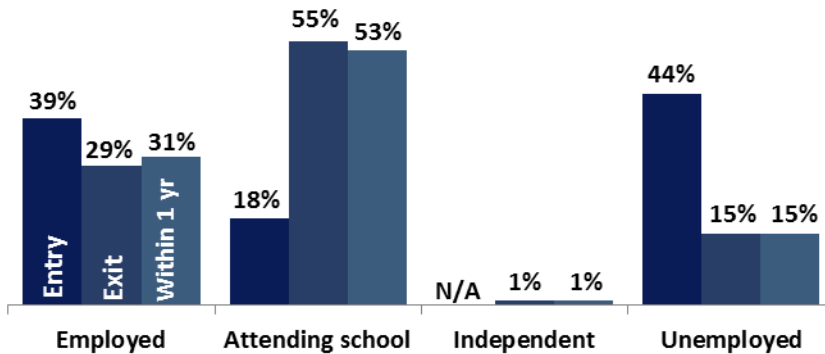
Follow-up information was gathered within one year of exit (if a learner had multiple follow-ups, the most recent information was used).

Gains in school enrolment for learners in the Secondary School Credit goal path were very similar to those in the Postsecondary Education goal path. The percentage of learners enrolled in school tripled from entry (18%) to exit (54%) for the former. Fewer learners were still in school within one year of exiting the LBS program, possibly because they had completed their needed credits. There were gains in the percentage of learners employed at follow-up (almost 10% increase).[AD]

Learners in the Independence goal path are gaining skills for independence

Learners in all goal paths are gaining skills for independence, but this outcome is particularly noteworthy for learners in the Independence goal path.

When asked about the biggest changes in their lives as a result of the LBS training, almost half of learners (49%) in the Independence goal path indicated that the LBS training had increased their personal independence.[LS] Computer skills, communication skills, and financial skills were key outcomes for learners in this goal path.[LS]

	Independence goal path	All learners
Improved my computer skills	63%	33%
Improved my confidence	55%	48%
Increased my personal independence	49%	36%
Other skills (math and reading)	43%	49%
Able to communicate better with other people	40%	36%
Able to manage my finances better	27%	23%
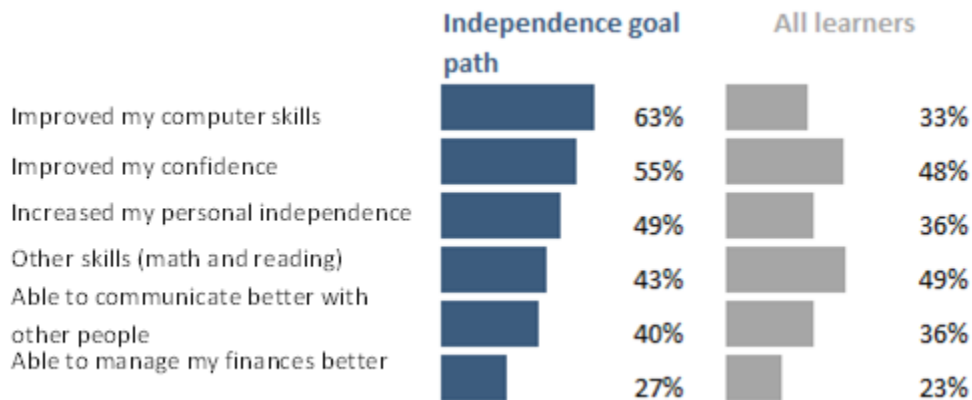
Service providers also agreed that learners were increasing their personal independence. They mentioned learners have increased their parenting skills and learned how to better manage their health and households.[SPS] As described by a service provider:

Learners are able to better manage their health: understand and complete forms, understand and follow prescriptions, instructions, medical information, read nutrition information. They are better able to manage their households: understand grocery store flyers, calculate costs, budget household expenses, write letters to landlords, family etc., read their children's report cards, help children with their homework. They are better able to navigate the outside world: deal with lawyers, government officials, vote, access resources, access community events, participate in social and civic initiatives, use the TTC, read and understand the news, and think critically about the information that they receive.[SPS]

8.7 Long-term outcomes: Learners may have increased their participation and engagement in community, social, and political processes

There is some indication that learners have **increased their participation and engagement in community, social, and political processes.**[LS, SPS] The learner survey indicated that 24% of learners became more involved in their community as a result of LBS training.[LS] Service

providers also indicated that learners gained an increased sense of belonging, social integration, and civic engagement. Service providers also mentioned their learners are now better integrated in the community and have an increased interest in social issues.[SPS]

8.8 There are differences in learner outcomes across sectors, streams, and goal paths

The table on the following page provides a comparison of selected outcomes across sectors, streams, and goal paths.

Some trends in outcomes were observed across sectors. Specifically:

- **College sector** learners are progressing particularly well (as measured by Milestones). Unsurprisingly, they are more likely to return to school than learners in other sectors, but less likely to gain employment.[AD]

- **Community Agency sector** learners progress more slowly than learners in other sectors, and are less successful in completing Milestones. This may be a function of multiple learner barriers and/or because there are few Milestones suitable for assessing progress when learners have very low competency levels.[AD]

Patterns were also observed across streams:

- **Deaf stream** learners progress much more slowly than learners in other streams. They are less successful in completing Milestones and are less likely to achieve their learning goals or complete all goal path-required learning activities. On balance, more learners are leaving school while they are in the program than entering it, but there is a small increase in employment within the year after exit.[AD] Some of the reasons for this are explored in Appendix C: Case study on the Deaf stream.

- **Aboriginal stream** learners have quite strong employment gains and many return to school, but few completely achieve their learning goals or complete all goal path-required learning activities.[AD]

- **Francophone stream** learners progress relatively slowly in the program but are ultimately successful in completing Milestones. They have moderate employment/school outcomes.[AD]

Table: Outcome comparisons by sector, stream, and goal path[AD]

	Sector	Sector	Sector	Stream	Stream	Stream	Stream	Goal path	Goal path	Goal path	Goal path	Goal path
% learners	31%	41%	28%	89%	1%	7%	3%	28%	6%	16%	39%	12%
Outcomes	Comm. Agency	College	School Board	Anglo-phone	Deaf	Franco-phone	Aboriginal	Employment	Apprenticeship	Secondary school	Post-secondary	Indepen-dence
% learners achieving at least 1 Milestone Task	**77%**	**96%**	**81%**	**86%**	**77%**	**86%**	**82%**	**83%**	**88%**	**79%**	**92%**	**82%**
Average Milestone success rate	**73%**	**93%**	**79%**	**83%**	**76%**	**85%**	**80%**	**79%**	**86%**	**76%**	**90%**	**79%**
Median time to competency attainment (weeks)	**10.7**	**1.3**	**5.0**	**5.0**	**23.0**	**11.0**	**4.0**	**7.0**	**5.0**	**5.3**	**2.5**	**10.5**
% learners completing all goal path-required learning activities	**55%**	**62%**	**58%**	**59%**	**48%**	**66%**	**45%**	**60%**	**68%**	**51%**	**57%**	**64%**
% in school at entry*	6%	16%	14%	11%	39%	25%	8%	6%	9%	18%	18%	7%
% in school at exit*	23%	48%	39%	39%	20%	34%	28%	18%	39%	54%	55%	9%
Change from entry to exit: % in school*	**↑17%**	**↑32%**	**↑25%**	**↑28%**	**↓19%**	**↑9%**	**↑20%**	**↑12%**	**↑30%**	**↑36%**	**↑37%**	**↑2%**
% employed at entry*	32%	42%	30%	36%	20%	43%	23%	40%	38%	24%	39%	28%

	Sector	Sector	Sector	Stream	Stream	Stream	Stream	Goal path	Goal path	Goal path	Goal path	Goal path
% employed within one year of exit*	44%	40%	39%	41%	25%	40%	38%	58%	70%	33%	31%	25%
Change from entry to follow-up: % employed*	**↑12%**	**↓2%**	**↑9%**	**↑5%**	**↑5%**	**↓3%**	**↑15%**	**↑18%**	**↑32%**	**↑9%**	**↓8%**	**↓3%**
% of learners exiting because completed or goal achieved	**48%**	**52%**	**51%**	**51%**	**35%**	**53%**	**42%**	**55%**	**65%**	**43%**	**49%**	**51%**

Figures include only learners who have exited the program. Green text indicates a more positive outcome, while orange text indicates a less positive outcome (in comparison).

Figures include only learners with labour market status information at entry, exit, and follow-up.

Lastly, there were some notable differences across goal paths:

- As might be expected, learners in the **Independence goal path are not making gains in employment or school**. They progress more slowly than learners in other goal paths.[AD]

- **Apprenticeship goal path learners are making progress and rapidly moving on to school and employment**.[AD] It appears that these learners come to LBS to address specific gaps in their competencies that are holding them back.[CV]

8.9 Learners gain confidence and self-esteem through the LBS program

When learners were asked about how they had changed as a result of the LBS training, the most common answer (mentioned by 48%) was that they had **gained confidence and self-esteem**.[LS] When asked specifically whether the LBS program helped them feel more confident about their next steps, 87% agreed.[LS]

The majority of learners believe their training helped them feel more confident about their next steps
(n=1,149)[LS]

Response	Percentage
Agree	87%
Neither Agree nor Disagree	5%
Disagree	7%
Don't know	1%
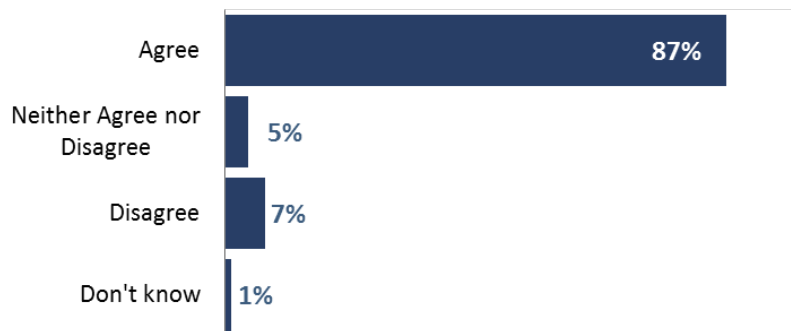
"The program **builds confidence and self-esteem more than anything**. Many wounded, beaten down folks enter the program and leave with a sense of accomplishment that they did not formerly see as possible."

– Service provider[SPS]

The literature suggests that gains in confidence are common among adult learners and are a significant part of learning.[141]

Other than confidence, the most often mentioned changes were that learners developed:[LDG, LS, SPS]

- stronger "soft skills" in communication;

- time-management skills;

- self-management skills;

- more resilience and optimism about their future;

- a better understanding of, and skills to, navigate the postsecondary and apprenticeship system;

- an increased sense of belonging and civic engagement;

- increased motivation;

- a greater awareness of resources;

- better parenting skills;

- ability to better manage finances;

- more responsibility; and

- better learning skills and an increased desire to learn.

The following statements from learners reflect how LBS is changing their lives:

For people like me who fell through the cracks in the regular school system, many years ago, this school has given me a second chance to achieve my goal because it has brought up my self-confidence. Before this, I was always told I was stupid.[142]

It's helping me. I can now read the scales on maps. I'm learning how to calculate the distance and how long it will take to get somewhere. You have to be able to do this on the job.[LDG]

---

[141] Eldred, J., et al. (2006). Catching confidence: The nature and role of confidence.

[142] This quote is from a printed testimonial received during a consultation visit.

I'm doing something with my life.[LDG]

> "My experience here has changed me – **it has given me confidence**."
> – Learner[CV]

> "What I've learned about myself is that **I don't think I'm stupid anymore**."
> – Learner[CV]

8.10 Conclusions

Learners and service providers believe that LBS program is making a difference in learner's lives. Learners indicate that they are gaining confidence and making meaningful improvements in their literacy and essential skills. The majority feel ready for their next steps by the time they exit the program. Indeed, some learners indicated that they successfully transitioned to their next steps within one year of exiting the program, with those in the Employment and Apprenticeship goal paths finding work and/or getting a better job, and those in the Postsecondary Education and Secondary School Credit goal paths going back to school.

Taking part in the LBS training has also encouraged more learners to increase their participation and engagement in community, social, and political processes.

9 To what extent is LBS being delivered in an effective and efficient manner?

9.1 Introduction

This chapter assesses the efficiency and effectiveness of the LBS program by reporting on the program's total costs and outputs. It further seeks to identify what undermines and what enables efficiency within the program. It provides three key conclusions:

- The per-hour costs of LBS are reasonable, in light of a comparison to the costs of college education. (Results regarding costing should be approached with caution given that this evaluation represents the first attempt to conduct a cost analysis of the LBS program, some key information such as Ministry administrative costs is missing, data integrity is sometimes compromised, and very little comparative information is available.)

- Perceived enablers of effective and efficient service delivery include staff qualifications/commitment and relationships/co-location with other organizations.

- Perceived barriers to effective and efficient service delivery include insufficient funding and Ministry performance management processes.

9.2 LBS costs are reasonable

How much does LBS cost?

In 2014-15, **expenditures for the LBS program were $83,903,392.** The costs of internal administration and oversight of the program were not available.[143] The table below shows a summary of expenditures.[144]

Table: Summary of all program exenditures, 2014-2015

Type of expenditure	# of organizations	Expenditure	% of total
In-person provider operating funding	274	$73,103,298	87%
e-Channel provider operating funding	5	$3,600,000	4%
Support organization operating funding	27	$3,567,853	4%
Service Delivery Network Development Fund (project funding)	32	$3,464,766	4%
Training	1	$167,475	<1%
Overhead (e.g. cost of MAESD staff involved in administering LBS)	Not applicable	Unknown	
Total		$83,903,392	

LBS costs decreased by over $2 million in 2015-16, due in part to the re-purposing of SDNDF funds to other MAESD priorities.

---

[143] Internal costs include: ETC salaries; ETC travel for compliance visits; salaries of corporate staff (e.g. policy, program, business intelligence); proportion of MAESD office costs devoted to LBS, etc. As MAESD staff are responsible for multiple programs, it is difficult to determine the proportion of costs associated with the LBS program specifically.

[144] MAESD. (2015). LBS performance analysis – budgets 2014-15.

Where does this money go?

In-person service provider transfer payments were given to 274 service delivery sites. In 2014-15, they ranged from nearly $4.7 million yearly for a site that serves over 2,300 learners, to less than $100,000 yearly for a site serving fewer than a dozen learners. The median transfer payment was approximately $140,000. Among sectors, community agencies had the smallest budgets (median of approximately $105,000) and colleges the highest (approximately $315,000).[145]

Support organization operating funding was given to 27 organizations in 2014-15, including 16 regional networks (see table below).[146]

Table: Operating funding for support organizations, 2014-15

Type of support organization	# of organizations	Expenditure
Regional network	16	$1,570,456
Stream organization (including Essential Skills Ontario)	4	$678,260
Sector organization	3	$252,508
Other LBS support organization	4	$1,066,629
Total	27	$3,567,853

Project funding from the SDNDF was given to 31 organizations in 2014-15, including 24 out of 27 LBS support organizations (see table below.)[147] When SDNDF funding was re-purposed to meet other government priorities in 2015-16, this reduced costs by $3.5 million.[148]

---

[145] MAESD. (2015). LBS performance analysis – budgets 2014-15.

[146] MAESD. (2016). LBS expenditures for support organizations 2014-15 to 2015-16 spreadsheet.

[147] MAESD. (2016). LBS expenditures for support organizations 2014-15 to 2015-16 spreadsheet.

[148] MAESD. (2014). SDNDF fiscal 2014-15 spreadsheet.

Table: SDNDF project funding, 2014-15

Recipient	# of organizations	Expenditure
Regional network	13	$1,223,618
Stream organization (including Essential Skills Ontario)	4	$636,207
Sector organization	3	$446,772
Other LBS support organization	4	$820,909
Organization external to LBS (e.g. workforce planning boards)	7	$337,260
Total	31	$3,464,766

How much does this buy?

In 2013-14, the approximately $84 million spent on the LBS program provided the following services:[AD, 149]

	In-person	e-Channel	Total
Learners served	36,719	5,587	~40,000[150]
Hours of service	10,787,356	unknown[151]	~11,000,000
Milestones achieved	61,394	5,490	66,884
Goal paths completed[152]	4,041	0[153]	4,041

---

[149] MAESD. (2015). LBS performance analysis – budgets 2014-15; Detailed Service Quality Report (DSQR) data; EOIS-CaMS learner data.

[150] An exact number cannot be calculated as the number of blended learners (enrolled in both in-person training and e-Channel) is unknown.

[151] Total hours could not be calculated for e-Channel due to inaccuracies in the estimated weekly hours of instruction.

[152] Completion of goal path measures indicate successful completion of all three elements of the Learner Plan: Milestones, Culminating Task, and learning activities.

[153] This is due to the fact that no Culminating Tasks are currently available to be administered online; "completion of goal path" requires a learner to have achieved a goal path-specific Culminating Task.

In addition, service providers provided information, conducted assessments, and provided referrals for numerous individuals (clients) who did not officially become learners.

Including service provider transfer payments only, delivering LBS services is estimated to cost approximately:[AD, 154]

In-person	e-Channel
$2,000 per **learner**[155]	$650 per **learner**[156]
$7 per **hour**[157]	unknown per **hour**[158]

These figures should be **interpreted as "ballpark" estimates only**, for the following reasons:

- Hourly rates are based on providers' estimates of learners' weekly time commitments and may not be accurate. (Missing values for time commitment were replaced with the site's average.) The true cost per hour may be substantially larger or smaller than what is noted.

- For some variables, 2013-14 performance data has been matched with 2014-15 budget data.

- Providers sometimes deliberately leave certain learners out of EOIS-CaMS,[CV, SPI] meaning that costs per learner and per hour are likely lower than the numbers presented.

- Providers may not enter learners into EOIS-CaMS until after they have been in the program for some time,[CV] so cost per hour is likely lower than the numbers presented.

---

[154] MAESD. (2015). LBS performance analysis – budgets 2014-15; MAESD. (2014). LBS performance analysis – budgets 2013-14; DSQR data.

[155] 2014-15 operating budget divided by actual number of learners in 2014-15, regardless of how many weeks they attended.

[156] 2014-15 operating budget divided by actual number of learners in 2014-15, regardless of how many weeks they attended.

[157] 2014-15 operating budget divided by 2013-14 total hours of service. Hours of service were calculated using estimated time commitment and number of weeks attending in 2013-14. Missing values for time commitment were replaced with the site average. Hours of service may be underestimated (and cost per hour overestimated) if providers entered learners after they had been in the program for some time.

[158] Hourly costs for e-Channel could not be calculated due to inaccuracies in the estimated hours of instruction.

How efficiently is this money used?

Hour for hour, MAESD funding for the LBS program ($7 per hour) is a bit higher than funding levels for Ontario college education ($5 per hour – see table below for details). Colleges also charge tuition to help offset their expenses. When learner tuition is factored in, the total cost per hour of a college education is approximately $9 per hour. This comparison should be interpreted with great caution due to the data quality limitations in the measure for hours of LBS service.

Table: Funding per hour - calculations for Ontario college education

Item	Amount	Details / sources
College enrolment (full-time equivalent [FTE])	350,000	Assumes 200,000 full-time students and 300,000 part-time students (counted as 0.5 FTE)[159]
Annual number of service hours per full-time learner	650	25 hours/week x 13 weeks/semester x 2 semesters[160]
Total number of service hours	227,500,000	College enrolment FTE x Annual number of service hours
MAESD funding to colleges	$1,134,000,000	Includes enrolment-based funding, performance funding, and special purpose grants[161]
Annual MAESD funding/hour	$5	
Annual learner tuition	$2,400	[162]
Tuition/hour	$4	
Total cost/hour	$9	

Since LBS is a free service, LBS providers have less revenue per hour to work with than their college counterparts. Given these funding limitations, it is impressive that the LBS service providers manage to provide such tailored services.

---

[159] Colleges Ontario. (2014). Environmental scan 2014: Student and graduate profiles.

[160] OPSEU Local 560. (2016). Is Seneca College violating Ministry standards?

[161] MAESD. (2016). College funding model reform consultation paper.

[162] ontariocolleges.ca. (n.d.). Paying for college: Tuition and financial assistance.

9.3 Cost efficiency is variable

Areas of high and low cost

The table below shows approximate median costs per in-person learner served and per hour of service, with notable areas of low cost indicated in **blue**.[AD, 163] Certain areas of high and low cost were identified:[AD, 164]

- **Larger sites cost less per unit** than smaller sites, likely due to economies of scale.

- **Northern region sites cost somewhat more** than other regions across all categories, due to this region's higher proportion of small sites.

- **Deaf stream sites are by far the most expensive** across both categories as all of these sites are small and they face the unique challenge of instructing learners in up to two second languages (ASL and English). See Appendix C: Case study on the Deaf stream for details.

- **School boards have the lowest unit costs**, even when controlling for size. This may be due to the extensive resources (such as classroom and office space, administrative support, and computer equipment) that School Board sector providers receive from the boards of which they are a part.[CV]

- **Anglophone stream sites tend to have lower unit costs** than sites in other streams, largely because this stream tends to have larger sites than the other streams.[CV, SPI]

---

[163] MAESD. (2015). LBS performance analysis – budgets 2014-15; DSQR data.

[164] MAESD. (2015). LBS performance analysis – budgets 2014-15; DSQR data.

Table: Unit costs in dollars (approximate)

Category	Cost per learner served[165]	Cost per hour[166]
Sector: Community Agency	1,900	9.00
Sector: College	2,300	6.50
Sector: School Board	1,600	5.50
Stream: Anglophone	1,900	6.50
Stream: Deaf	6,100	20.50
Stream: Francophone	2,400	10.50
Region: Central	2,000	6.50
Region: East	2,100	7.00
Region: North	2,200	8.00
Region: West	1,900	6.50
Size: Small	3,200	12.00
Size: Med	1,900	8.00
Size: Large	1,900	6.00

Enablers of and barriers to efficient and effective service

Various stakeholders provided their perceptions as to what enables and undermines efficient and effective service.[CV, MI, SOI, SPI, SPS]

---

[165] 2014-15 operating budget divided by actual number of learners in 2014-15, regardless of how many weeks they attended.

[166] 2014-15 operating budget divided by 2013-14 total hours of service. Hours of service were calculated using estimated time commitment and number of weeks attending in 2013-14. Missing values for time commitment were replaced with the site average. Hours of service may be underestimated (and cost per hour overestimated) if providers entered learners after they had been in the program for some time.

Two enablers stood out:

Skilled and dedicated staff.[CV, MI, SOI, SPI, SPS] In the service provider survey, respondents overwhelmingly attributed their effectiveness to their human resources, especially instructors.[SPS] A variety of stakeholders spoke glowingly about the skilfulness of LBS staff and their strong intrinsic motivation to serve learners:

Great staff and volunteers [who are] smart, caring, socially conscious, committed, warm, trained, flexible, [and] go the extra mile.[SPS]

People continue to work in this field because they really believe in what they are doing. They care. It is an incredible feeling to give someone the power of literacy.[SOI]

I've been all around the education field, and I have never, ever met such dedicated people as I have in the literacy field.[CV]

The people who work in this field are wonderful – devoted, professional, and very, very interested in the welfare of their clients.[SOI]

The way that they can tailor their plan items and their workshops is amazing. They are so resourceful….They are really good at not taking a traditional education setting. They've been really great at saying, 'We can come to you. We can set it up any way that meets the learner's needs.' I think that is key to learners' success.[CPI]

The skill and dedication of staff are also clear in learners' testimonials,[LDG, LS] previous evaluations,[167] and observations made during consultation visits.[CV] Lower staff turnover ensures that high-quality staff are retained and creates efficiencies.[SPS]

> "It's not OALCF, it's not the PMF or CaMS. **It's the teacher** that helps the learner succeed."
> – Service provider[SPI]

Partnerships and co-location.[CV, SPI, SPS] After human resources, this was the second most commonly mentioned enabler in the service provider survey,[SPS] and it was also mentioned in other lines of inquiry.[CV, SPI] Having strong partnerships with other organizations in the community facilitates cross-referrals, and co-location makes these referrals feel seamless to the learner.[CV, SPS] One college provider reported, "Our learners have access to the gym, computer labs, smart boards, disability services, the food bank. Thursdays we have a good food market

---

[167] For instance, Deloitte. (2011). Evaluation of the LBS program.

here."[CV] Co-location also allows cost sharing of rent, utilities, supplies, and administration, and providers sometimes receive these from co-located institutions as in-kind contributions.[CV]

Stakeholders most often pointed to the following barriers to efficient and effective service:

Inadequate funding[CV, SPI, SPS] limits providers' organizational capacity and means that a large proportion of operating costs are devoted to overhead.[CV, SOI] This was a pervasive concern across several lines of inquiry, and it is explored in more depth in chapter 11, which focuses on the effectiveness of the Ministry support and funding structures. Limited funding prevents providers from attending professional development events even when they are offered.[CV] It also drives down wages for staff, resulting in higher staff turnover and the inefficiencies that come with that.[SOI, SPI]

The administrative burden of data entry and reporting requirements diverts resources from service provision.[CV, SOI, SPI, SPS] This was the second most commonly cited detractor in the service provider survey.[SPS] It was also a widespread area of concern across other lines of inquiry.[CV, SOI, SPI] The next section of this chapter, as well as Appendix A: Case study on the PMF, examine this topic in detail.

Inadequate leadership and guidance on the part of the Ministry and its ETCs causes confusion and anxiety about PMF requirements[CV, SOI, SPI, SPS] and thus diverts significant time and effort from service provision. This topic is explored in more depth in chapter 11, which focuses on the effectiveness of the Ministry support and funding structures.

Assessments, including Milestones and Culminating Tasks, can be time consuming and frustrating for both learners and providers.[CV, SPI, SPS] This topic is explored in more depth in chapters 5 and 10, which focus on the OALCF and the PMF.

Barriers to learning, such as poverty, disability, substance use issues, and trauma, make it difficult for learners to progress.[CV, SPI, SPS] Although providers may be effective and efficient in serving such learners, these barriers may slow learners' progress and therefore result in higher costs per learner and per hour.

Inadequate training and professional development limit organizational capacity to deliver effective services.[CV, SPI, SPS] Many service providers (65%) reported that their instructors have additional training needs,[SPS] and providers across multiple lines of inquiry reported that inadequate professional development, training, and best practices are a barrier to their work.[CV, SPI, SPS]

9.4 Administrative burden is a major inefficiency

How heavy is the burden?

The Ministry's **data entry, reporting, and monitoring** requirements were frequently and strongly noted by service providers as a source of inefficiency.[CV, SPI, SPS] Support organizations[SOI] and one Ministry interviewee also raised this concern.[MI] Data entry and reporting requirements were described as:

- "herculean;"[CV]

- "excessive;"[CV]

- "tedious," "stringent," and "unrealistic;"[SPI]

- "a full-time job in itself;"[SPI] and

- "not in line with the amount of funding that we get."[CV]

Stakeholders often stated that the administrative burden is **taking time away from serving learners**.[CV, SPS] 12 out of 25 support organizations expressed the same concern,[SOI] with one noting that "For every $1,000 [service providers] spend entering data in CaMS, that is one student who gets turned [away]."[SOI]

> "[We] spend so much time **counting the cows** that we don't have time to **feed the cows**."
>
> – Service provider[CV]

Concerns about administrative burden were **especially pervasive in the College sector**: in the service provider survey, 92% of College sector respondents indicated that reporting requirements were unreasonable and burdensome.[SPS] One College sector provider lamented that "This job has become more about data entry than about teaching."[SPI]

Providers often stated that this burden has **increased with the introduction of the PMF and EOIS-CaMS**.[SPS] While this burden is inevitable during the early stages of adapting to large systemic changes such as the PMF, there is evidence that **the burden has not been decreasing** as providers familiarize themselves with the new protocols. Community Literacy of Ontario's

2014 EOIS-CaMS Implementation Report found that providers' stated difficulties with EOIS-CaMS data entry and reporting had not decreased since 2013 and may in fact have increased.[168]

Service providers' reporting requirements also **indirectly consume a good deal of support organizations' time** as guidance on PMF requirements is the most commonly cited support that service providers request from support organizations.[SOI]

Although it was not possible to obtain exact figures for how much time providers spend on data entry and reporting, stakeholders provided the following estimates:

- 30 to 50% of a program's total time.[SOI,SPI]

- 70 hours per month between three FTE for a provider that serves approximately 100 learners per year, as compared to 3 hours per month when using the previous Information Management System (IMS) platform.[SPI, 169]

- 4 hours out of a 27-hour work week.[CV]

- 1 hour to input one new learner,[SOI] and 45 minutes to complete a learner exit (in order to "close the hard copy, close the e-copy, go on CaMS, put in the final referral and close that file").[CV]

- One site stated that they stop seeing learners early once per week in order to catch up on EOIS-CaMS data entry,[CV] and another site stated that they stop entering learners into EOIS-CaMS after they reach their Learners Served targets because it is too time consuming.[CV]

This is in addition to many other administrative tasks that providers do such as preparing for and hosting compliance visits, maintaining their own databases, and administering their offices.[CV]

Taking all of this into consideration, although exact figures are not available, it seems likely that service providers' administrative tasks occupy well over the 15% threshold for operating expenses considered a standard of excellence in both the business and charitable arenas.[170] The administrative burden may vary according to organizational size, sector, stream, and region; this was not assessed.

---

[168] CLO. (2014). EOIS-CaMS Implementation: Successes, challenges and support needs.

[169] It is important to note that the previous IMS did not require learner-level data; service providers only needed to report aggregate numbers of learners.

[170]Charity Navigator. (n.d.). Glossary – administrative expenses.; Business Literacy Institute. (n.d.). Operating expenses.

Why is the burden so heavy?

A number of reasons for this high administrative burden were identified in the course of the evaluation:

EOIS-CaMS is a difficult platform for data entry. Although a small number of providers said that they do not find EOIS-CaMS difficult to use,[CV, SPS] far more providers expressed concerns about its lack of user friendliness.[CV, SPI, SPS] Specific critiques included the following:

Issue	Examples
Inaccessibility or long load times at certain times (end of March, Fridays, lunchtime)	"CaMs workload can NOT be scheduled due to the variances in accessibility (at any given time on any given day CaMs interface may go from good to extremely slow to offline)"[SPS] "It takes me five minutes just to open it up."[SPI]
Frequent time-outs and lost data	"I get kicked out after five minutes of inactivity….It doesn't do an autosave."[CV] "Offline data often needs to be reentered into CaMs because the system has not accepted or saved it; sometimes this is not noticeable until the next report cycle."[SPS]
Instability	"It crashes and freezes a lot. It takes an hour to input one client."[SOI]
Confusing field names and definitions	"The fields are not clear. They can mean different things to different people…The more variables that are in play, the more interpretations people can have."[CV] "The IMS system was simple and made sense and it was easy to enter data. The CaMS system is so confusing. The headings don't make sense."[SPI]
Time-consuming to use	"I asked my staff how many clicks of the mouse [it takes to input a new learner on CaMS]. It was 180 or 190 clicks of the mouse."[CV] "When searching for a client you have to click 6 different links to get to the client you are looking for when a simple search box and a single click would do….When entering [a] single bus ticket under transportation supports four calendar dates have to be entered in to the system instead of one."[SPS]
Confusing reports	"Report 64 and the case activity report for each client have at the bottom the percentage of carry-over and current numbers. These never jive perfectly, I don't know why."[CV]
Outputs not printer-friendly	"The PDF learner plan is ugly and is not user friendly at all. I dread showing my learner the learner plan as it is a bunch of boxes spread across some 35 pages. I prefer to make my own learner plan."[SPS]

EOIS-CaMS technical supports are inadequate.[CV, MI, SOI, SPS] EOIS-CaMS training materials are currently fragmented into over 50 individual documents created by the Ministry plus various others created by support organizations. There is no EOIS-CaMS helpdesk, something that service providers frequently ask for.[CV, SPI, SPS] Support organizations often are asked for support on EOIS-CaMS,[SOI] but they do not have access to the platform so they find it difficult to provide guidance.[SOI] ETCs are also asked for EOIS-CaMS support but may not be familiar with the details of the system.[SPS]

Sites need to keep multiple records.[CV, SPI, SPS] Sites are required to maintain electronic EOIS-CaMS information as well as to keep hard copies for seven years.[171] The majority of service providers (87%) stated that they also collect additional data beyond this (only 3% stated that they do not).[SPS] Sites often use another database in addition to EOIS-CaMS because it tracks important information that EOIS-CaMS does not, is easier to use, generates more useful reports or Learner Plans, or is required by the larger institution (i.e. school board or college) that the site is part of.[CV, SPI, SPS] One provider explained that, in addition to EOIS-CaMS:

We also have to keep a separate database to record the exact location of the class, the teacher assigned to teach the class and the entry assessment level of a learner. There is no way to generate a user-friendly list of current learners in [EOIS-CaMS]. This is a problem when a program [has] several hundred learners.[SPS]

This means that sites may need to triple-enter learners: EOIS-CaMS electronic information, EOIS-CaMS hard copies, and another database. This is especially a problem in the College sector, where other databases are already in use in the institution.[CV, SPI, SPS] College sector providers were the most likely to emphasize the administrative burden of reporting and data entry, and the redundancy of EOIS-CaMS data entry to their pre-existing, in-house databases.[SPS] Possibly related to this, colleges were also by far the least likely to agree that Ministry's expectations of my site are reasonable: just 16% agreed with this statement, while 60% disagreed.[SPS]

Learner follow-ups are time consuming.[CV] An especially time-consuming administrative task for certain service providers is the requirement to follow up with learners at three, six, and 12 months after exit. In consultation visits, 14 out of 17 providers mentioned follow-ups as a major area of difficulty.[CV] Learners may change phone numbers or email addresses, not return phone calls, or decline to provide information. One provider reported, "We don't work in June to September, but I come in in August to make the [follow-up] calls; but we're always behind....I just feel sick with the number of entries to make."[CV] e-Channel providers appear to have the most difficulty with follow-ups due to high learner-to-staff ratios and other challenges.[CV]

---

[171] MAESD. (2016). Participant's workbook: OALCF training for Employment and Training Division staff.

Providers are required to submit numerous reports. As specified in Schedule D of the service provider agreement, each year providers must submit:[172]

- four Quarterly Status and Adjustment Reports (QSARs);

- six Estimate of Expenditure Reports (EERs) for each service delivery site;

- one Statement of Revenue and Expenditure Report (SRER) for each service delivery site;

- one business plan for each service delivery site; and

- other "reports specified from time to time…on a date or dates specified by the Ministry."

In addition, sites receive compliance visits from ETCs at least once every three years (more often for sites that are underperforming on PMF requirements).[173] In-person compliance visits require providers to spend significant time[CV, SPI] in preparation (completing a self-assessment questionnaire of over 50 questions,[174] ensuring learner file hard copies are available, arranging for up to 15 learner interviews, briefing learners before interviews) and hosting the visit itself.[175]

Regional networks must also submit an LSP.[176]

As a result, over the year, providers must complete one report per month on average, as shown in the following graphic.

---

[172] MAESD. (2015). Service provider agreement 2015-2016; MAESD. (2015). 2015-2016 business plan service provider site instructions.

[173] MAESD. (2015). Memorandum: Announcing the Strategic Monitoring Framework.; MAESD. (2016). Participant's workbook: OALCF training for Employment and Training Division staff.

[174] MAESD. (2015). Comprehensive self-assessment questionnaire.

[175] MAESD. (2016). Participant's workbook: OALCF training for Employment and Training Division staff.

[176] MAESD. (2015). Support organization agreement 2015-2016; MAESD. (2015). 2015-2016 business plan support organization instructions.
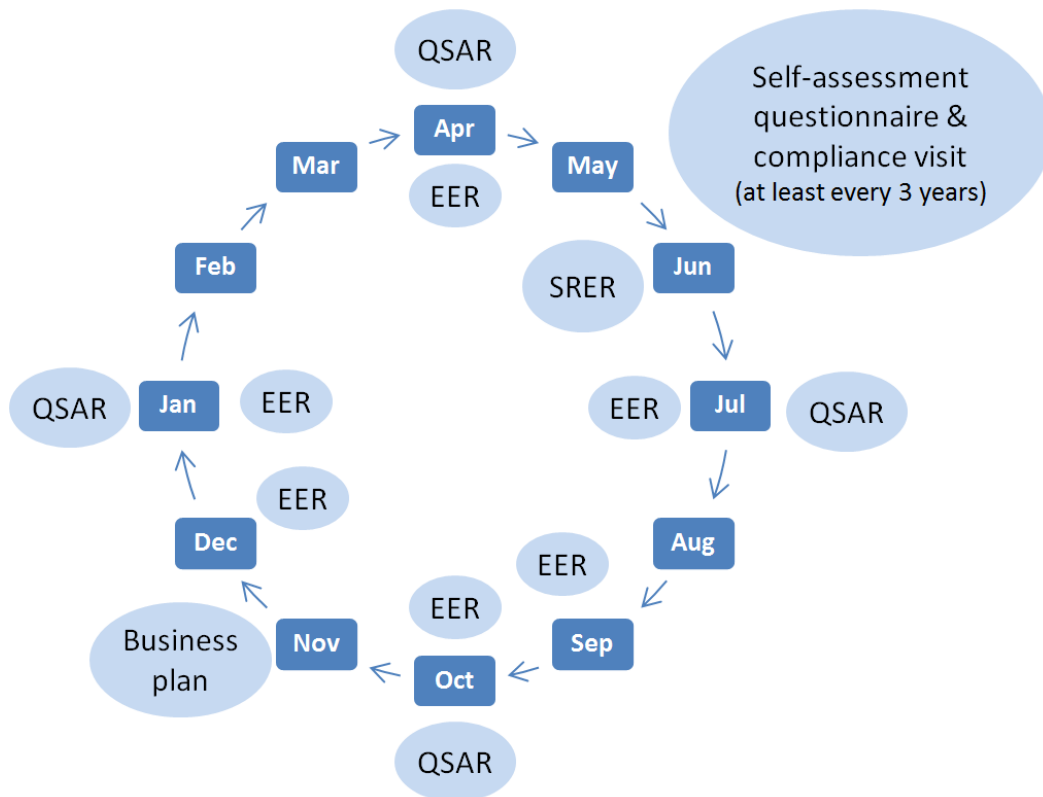
This is widely regarded by service providers and support organizations as excessive.[SOI, SPI, SPS] One support organization stated:

This is overkill; this is for everyone no matter what the size of staff or contract. It's one thing if you have a $600,000 budget, you can have a bookkeeper, but they require the same reporting no matter what the size of the contract.[SOI]

Stakeholders also expressed frustration with reports and requests for information with quick turnaround times at busy times of year, such as the winter holidays or the beginning of an academic semester in September or January.[SOI, SPS] For example[177]:

A new report was requested just before Christmas. Nobody knew it was coming. We were given only a six-day turnaround. Some organizations got an extension, but we didn't know about the possibility of getting an extension….There has to be a better way to streamline the reporting.[SOI]

Ad hoc reports … are requested with little turn-around time at busy times of the year. As an example, coming back after the Christmas break, we had four reports due for LBS within three

---

[177] It is not clear what specific reports providers were referring to in these examples.

weeks; two of the reports seemed to be duplicates of each other.[SPS] [Note: "four reports due" is not referring to 4 ad hoc reports, but 4 reports generally.]

Recommendation C-2: Ensure that providers can spend the large majority of their time in serving learners. This can be achieved by reducing providers' administrative burden:

- Review the data entry requirements to ensure that only the most important administrative data is collected.

- Reduce the number of reports that providers must submit each year.

- Invest in usability and stability enhancements to EOIS-CaMS.

- Institute a centralized EOIS-CaMS helpdesk and consolidate EOIS-CaMS training documents into one searchable online resource that is continuously updated with Ministry-approved information.

9.5 Conclusions

Considering that the per-hour costs of LBS are not much higher than that of Ontario college education, and that LBS provides individualized service for learners who often have complex barriers, **the costs can be considered reasonable**. Areas of higher cost (the Deaf stream, the Northern region, and small sites) reflect the unique challenges of particular sites and learners, and are not cause for concern.

Perceived enablers of effective and efficient service delivery include committed and skilled staff, relationships with other organizations, and in-kind contributions from individuals and organizations. Perceived barriers include inadequate funding and Ministry performance management processes.

It is notable that perceived enablers were external to the Ministry, while the perceived barriers were internal to the Ministry. This raises the troubling possibility that, with the important exception of providing the funding that makes LBS possible, **the Ministry may currently be doing more to decrease the efficiency and effectiveness of the LBS program than to increase it**. Burdensome data entry and reporting requirements are the most commonly cited cause of inefficiency in the LBS system.

> "If you can't give [providers] money, **give them a bit of a break**. That'll go a long way too."
> – Support organization director[SOI]

10 How well is the PMF supporting business intelligence and continuous improvement?

10.1 Introduction

This chapter examines how effective the PMF has been as a driver of business intelligence and continuous improvement for the field and the Ministry. It concludes that although the basic rationale of the PMF is commendable, its implementation has overshadowed its intentions. The PMF as currently implemented has encountered severe challenges which undermine its effectiveness:

- Continuous improvement requirements have often been implemented in a one-size-fits-all manner, making it difficult for providers to fill community-specific niches.

- Anxiety over meeting requirements that are perceived to be unreasonable has led to gaming behaviours, reducing the integrity and interpretability of EOIS-CaMS data.

- The integrity of EOIS-CaMS data is further undermined by unclear definitions and inconsistent guidance.

- Given these liabilities, the data is used almost entirely for compliance rather than to improve services.

- The focus on compliance has undermined goodwill and cooperation between the field and the Ministry, further undermining stakeholders' confidence in, and willingness to use, the performance data.

These hurdles must be overcome before the PMF can fulfill its promise of supporting business intelligence and continuous improvement.

The impacts of the PMF roll-out on particular providers are illustrated in more detail in Appendix A: Case study on the PMF.

10.2 The PMF's basic rationale is sound

The Drummond report and concerns over increasing deficits have placed **fiscal prudence and accountability at the top of the provincial agenda**.[178] Under Premier Wynne, the Ontario government has pledged to balance the provincial budget by 2017-18 and to "mak[e] every

---

[178] Commission on the Reform of Ontario's Public Services. (2012). Public services for Ontarians: A path to sustainability and excellence.

dollar count"[179] through increased monitoring and evaluation of government expenditures and programs.[180]

> "We did not control spending by **slashing and burning**, as some would do. We did it by **closely examining** programs."
>
> – Ontario 2015 Budget Speech

This agenda has extended to the learning ministries.[181] In a 2014 mandate letter to Minister Moridi, Premier Wynne instructed the Ministry to closely track "clients' journeys through the [employment and training] system" as well as their final outcomes.[182] Reports by Deloitte (2011) and Cathexis (2011, 2012) advocated data collection in the LBS program, and Deloitte further recommended the implementation of standardized success measures and a pay-for-performance system.[183] A Ministry interviewee emphasized:

One of the broad priorities right now for the government is to make programmatic decisions influenced by the best evidence available....This has signaled a very enterprise-wide effort for government to only be making evidence-based decisions and to really understand outcomes in a true way, not where we're looking at inputs or outputs, but where we're really understanding what we are getting from our programming and what the ROI is.[MI]

The Ministry responded by launching the PMF[184] on April 1, 2012. The PMF is intended to:

- ensure the public accountability of the LBS program;
- drive quality service;

---

[179] Ontario. Ministry of Finance. (2015). 2015 budget speech.

[180] Ontario. Ministry of Finance. (2015). Budget highlights; Ontario. Ministry of Finance. (2015). 2015 budget speech.

[181] E.g. EDU. (2014). Renewed vision for education in Ontario.

[182] Wynne, K. (2014). 2014 mandate letter: Training, Colleges and Universities.

[183] Cathexis Consulting Inc. (2012). Workplace and Community Workforce Literacy and Essential Skills (WLES) evaluation; Cathexis Consulting Inc. (2012). Assessment of WLES database; Deloitte. (2011). Evaluation of the LBS program; Statistics Canada. (2013). Skills in Canada: First results from the Programme for the International Assessment of Adult Competencies (PIAAC).

[184] The PMF is part of the wider Performance Management System, which also includes Continuous Improvement and Business Intelligence.

- ensure that services are available to all learners who need them; and

- incentivize service providers to help learners progress and achieve their goals (or refer out to other services).[185]

The design of the PMF

To meet their commitments under the PMF, LBS service providers must demonstrate:

- **organizational capacity** to effectively deliver LBS services;

- **compliance** with their signed agreement with the Ministry and the LBS Service Provider Program Guidelines (including keeping a file for each learner, staying within budget, completing required reports, and delivering services in alignment with the OALCF); and

- that they are meeting the **Service Quality Standard (SQS),** a measure of a service provider's success in delivering the LBS program.

The SQS is of particular interest in this evaluation, as it is a recent introduction to the LBS program, continues to evolve, and was a frequent topic of comment by stakeholders.[CV, MI, SOI, SPI, SPS] It was introduced along with the wider PMF in 2012 (Phase I), revised in 2014 (Phase II-A), and will be revised again at a to-be-determined date (Phase II-B).

The SQS measures three dimensions of service quality: Effectiveness, Customer Service, and Efficiency. Each of these dimensions has measures nested within it and is weighted to demonstrate value and "tell a story" about the quality of LBS delivery. The tables show the SQS as it is now (Phase II-A), and how it will change (in Phase II-B).[186] Phase II-B will change the weighting of elements and introduce two new measures of Effectiveness: Completion of Goal Path, and Learner Gains.

Standards have been set for each measure as well as for the overall SQS score.[187] Providers are instructed to "commit to improve performance on any of the core measures in which they have fallen below the…standard."[188] However, only the overall SQS score is an absolute requirement. Falling below the overall SQS score flags a provider for increased monitoring[189] and may jeopardize the provider's continued funding.[190]

---

[185] This list is based on discussions with MAESD staff involved in the LBS program.

[186] MAESD. (nd). EO LBS Performance management reports training for service providers: Participant guide; MAESD. (2015). Service provider agreement 2015-2016.

[187] MAESD. (2016). LBS: Service provider program guidelines.

[188] MAESD. (2016). LBS: Service provider program guidelines. P. 32.

[189] MAESD. (2015). Memorandum: Announcing the Strategic Monitoring Framework.

[190] MAESD. (2016). LBS: Service provider program guidelines. P. 32.

The PMF is not yet in its mature stage, and continues to be refined.

Phase II-A

Category	Weight	Individual score	Weight
Effectiveness	50%	Suitability	20%
		Learner Progress	30%
Customer Service	40%	Service Coordination	25%
		Customer Satisfaction	15%
Efficiency	10%	Learners Served	10%

Phase II-B

Category	Weight	Individual score	Weight
Effectiveness	60%	Suitability	10%
		Learner Progress	20%
		Completion of Goal Path	20%
		Learner Gains	10%
Customer Service	30%	Service Coordination	20%
		Customer Satisfaction	10%
Efficiency	10%	Learners Served	10%

The value of the PMF

The Cathexis team identified the following virtues of the PMF:

- By monitoring service quality and outcomes in a consistent way across the system, the PMF can **support continuous improvement and public accountability** at both the site level and the delivery system level.

- The PMF **measures relevant and important variables**. The number of learners served by a provider (Learners Served), as well as learners' barriers (Suitability), transition-readiness (Completion of Goal Path), skill development (Learner Progress and Learner Gains), referral to other supports (Service Coordination), and satisfaction (Customer Satisfaction) are all crucial aspects of understanding a provider's performance. The PMF is designed to be a **flexible instrument**. By requiring providers to meet the standard for the overall SQS, but not for each individual measure, providers should be able to specialize in different niches. For instance, one provider may target less-barriered

learners and do well on the Learner Progress measure, and another provider may target more-barriered learners and do well on the Suitability measure. In theory, both providers could meet their overall SQS threshold and be rewarded for filling their niches.

Recommendation B-1: Continue to collect data and measure performance to support continuous improvement and public accountability at both the site level and the delivery system level.

10.3 Implementation challenges have undermined the success of the PMF

Despite its good intentions and sound design, the PMF has **not yet succeeded in achieving its aims**. The reception of the PMF in the field has been predominantly negative.[CV, SOI, SPI, SPS] A few stakeholders felt that the PMF had created the following benefits:[CV, SOI, SPI, SPS]

- greater accountability,

- clearer expectations,

- a common language,

- data that can be presented to stakeholders other than the Ministry, and

- data that can be used for continuous improvement or awareness of how programs operate.

But, across multiple lines of inquiry, **negative feedback was far more frequent and more concretely stated than positive feedback**.[CV, MI, SOI, SPI, SPS] The predominantly negative perceptions focus on the following challenges in implementing the PMF.

Administering the PMF has diverted resources from service provision

As explored in the previous chapter, the **administrative burden** of data entry and reporting required in the PMF is currently heavy, shows no signs of decreasing, and has taken away from services to learners.[CV, MI, SOI, SPI, SPS]

Uniform standards have discouraged niche filling

In theory, the SQS gives providers flexibility to fill a niche. According to guidelines, each provider must meet the standard for overall SQS score but is *not* required to meet the standard for each individual score; a provider is only required to "commit" to raising any individual

scores that do not meet the standard.[191] This should allow providers to excel in some areas, do less well in others, and still meet their overall requirements.

In practice, this has often not worked. Providers experience anxiety about Ministry consequences when they fail to meet *individual* standards, not just the overall SQS standard.[CV, SPI, SPS] This is partly because the Ministry has not consistently communicated to providers that they do not need to meet individual standards,[MI] and partly because providers sometimes fear that performance measures will be used punitively.[CV, SOI, SPI, SPS] It is also because the service provider guidelines do state that "Service providers must commit to improve performance on any of the core measures in which they have fallen below the…standard,"[192] even when low scores on an individual measure are deliberate, justified, or inevitable.

As a result, stakeholders feel that SQS standards are pressuring providers into filling a mold rather than fitting into a niche:[CV, SOI, SPI, SPS]

Community-based is expected now to work and act and look like a school board or college, but we're not….Community-based service providers work because we're grassroots and embedded in community. And I thought that was a good thing, but the MTCU doesn't seem to agree.[CV]

Somewhere within PMF or CaMS it needs to acknowledge that we're a college, not community-based, and that makes a difference.[CV]

CaMs, PMF and OALCF have created a system wherein organisational tick marks are more important, more emphasized and more valuable than learner centred success.[SPS]

Concrete examples of this are provided in Appendix A: Case study on the PMF.

Stakeholders identified a number of specific areas in which the implementation of the SQS has been misaligned with service providers' niches:

Suitability requirements are misaligned with the College sector. Colleges tend to serve learners at higher literacy levels[CV, MI] and learners who are younger, better educated, and have fewer barriers.[AD] As a result, in 2014-15, fewer than three in 10 (29%) of College sector providers met the Suitability standard, compared to 79% of Community Agency and 76% of School Board sector providers.[AD] Likely as a result of this, College sector providers are far more negative than other sectors in their appraisals of Suitability, with 74% saying that it is a poor measure of their effectiveness.[SPS]

---

[191] MAESD. (2016). LBS: Service provider program guidelines.

[192] MAESD. (2016). LBS: Service provider program guidelines. P. 32.

Learner Progress and Completion of Goal Path requirements are misaligned with the Community Agency sector, the Deaf stream, and providers that serve learners with low literacy, multiple barriers, and transient lives. Stakeholders worried that a learner with barriers and/or low literacy may make progress too slowly to be captured within the reporting period, and that there are too few low-level Milestones (and no attainable Culminating Tasks at all) for the learner's gains to be reflected in existing assessments.[CV, MI, SPI, SPS, 193] For instance, providers stated:

Success is only measured through these performance targets even if the learner has made progress in other ways. This is especially applicable for lower level learners who may show success a lot slower or in more incremental steps.[SPS]

We help people get food, clothing, shelter before starting an educational journey….The Ministry thinks all our students are laid-off brain surgeons. They think you can get them in and out, but there are many barriers that come up….That's why they aren't making progress.[SPI]

Learners with barriers and low literacy are served disproportionately by the Community Agency sector,[AD] making Learner Progress and Completion of Goal Path measures particularly difficult for this sector to meet.[AD] These measures are also a daunting challenge for the Deaf stream, as explained in Appendix C: Case study on the Deaf stream.

Recommendation B-4: Ensure that assessment tools can capture incremental progress for learners who make progress slowly. This can be done by developing more low-level Milestones and/or using the Learner Gains measure if appropriate.

Recommendation B-9: Continue to investigate measures of Learner Gains/skills development. Before implementing a measure, ensure that it:

- Can provide reliable information about learners' literacy and essential skills when a learner enters the program and when the learner completes the program.

- Is sensitive to changes in skill levels that could be expected within a typical program duration (two to eight months).

- Can be used with learners who have very low levels of literacy.

- Is appropriate for diverse cultural backgrounds, abilities (e.g. Deaf), learner goals, sectors, streams, and delivery modes.

- Is feasible for service providers to administer in the regular course of their intake and assessment process.

---

[193] Learners with less than a grade 12 education are indeed significantly less likely than others to complete a Milestone.[AD]

- Provides information that is meaningful and useful to service providers. Specifically, it should provide information that will help them:
    o Determine if a client is eligible and suitable for the LBS program;
    o Determine if a client is a good fit for their services, or should be referred to another service provider; and
    o Develop the client's learning plan.
- Is acceptable to both service providers and learners.
- Allows for some customization to ensure relevance to learners' goals (e.g. if learner wants to be able to balance their chequebook for greater independence, would want to assess skills that were mostly related to this, not skills like verbal communication).

Providers were also concerned that these measures are misaligned with sites that serve transient learners.[CV, SPI, SPS] A learner may enter and leave a program multiple times due to family commitments, seasonal work, relapses, incarceration, and other reasons,[CV, SPI] making it difficult to capture their learning in the Learner Progress score:[CV, SPI, SPS]

Many learners in this program have multiple service plans as they come and go quite often over two or three years. It would be good if the system could look at the totality of their service plans (e.g. milestones completed, referrals made, incomplete/complete...) as one journey rather than each service plan separately.[SPS]

The reporting periods in CaMs do not coincide with our delivery method (continuous intake). The beginning of the fiscal year (April 01) does not allow us to capture in a meaningful way the work our learners show. A learner may exit the program a few days into the current fiscal year and this does not give him enough time to show progress in that fiscal year....The program is designed to serve the learner's needs and not to comply with the deadlines of the fiscal year.[SPS]

[Our learners] are accessing our program in short bursts over many years....The PMF isn't built for people who use the system in that way. MTCU expects us to herd people through the program and it doesn't work like that. This is a long-term program.[CV]

This is a challenge and concern throughout the EO system.[194]

Recommendation B-8: In order to more accurately track the progress of transient learners, calculate Learner Progress per learner, not per service plan. This will allow the entirety of learning to be captured.

---

[194] MAESD. (2014). Employment and Training Services Integration broader consultation.

Service Coordination is misaligned with the Francophone stream, the Northern region, and any provider that relies on word of mouth. In 2014-15, 42% of Francophone sites fell below their Service Coordination standard.[AD] Francophone stream providers said that this was because many communities have few or no Francophone services other than LBS.[CV, SPS] Similarly, 43% of Northern sites fell below the standard,[AD] possibly due to the smaller number of services available in more remote communities. Sites that rely on word of mouth for their incoming referrals also express frustration that these informal referrals are not counted.[CV, SPS]

As a result of these and other misalignments, providers and support organizations called for more flexible SQS standards or standards that are aligned to individual sectors, streams, or sites:[CV, SOI, SPI, SPS]

Create three PMFs – one for each sector – that reflect typical LSP plans.[SPS]

It should be done the way that it is done when, for instance, you sign a contract with the Trillium Foundation: you set outcomes and accountability based on what you're actually doing, not based on some standard of what all programs must do.[SOI]

Implementation of the PMF in a uniform fashion has worked against the Literacy Service Planning process:[SOI, SPS] that process differentiates providers according to their areas of strength and community needs, while the PMF homogenizes providers according to a single province-wide standard. One regional network interviewee noted, "Planning table members are mandated to sit at our [Literacy Service Planning] table and be part of the discussions, but there is no power to that table."[SOI] The PMF, in contrast, does have power.

SQS requirements are sometimes unattainable

Only 38% of providers agree that the Ministry's expectations of their site are reasonable.[SPS] In addition to the issues identified above, providers expressed concern about the following:

Learners Served targets may require more funding than providers have.[SPS] Between 2013-14 and 2014-15, Learners Served targets decreased by 6% per site on average, but the decrease was heavily concentrated in the Western and Eastern regions.[AD] The Northern and Central regions had only small learner target decreases on average,[AD] which explains why sites in these regions were less likely to meet their targets in 2014-15. Sites in those regions must meet those targets with funding that decreases in purchasing power each year.[SOI, SPI]

Recommendation B-7: Ensure that Learners Served targets are continuously updated, reflective of evolving community needs and the differing intensities of working with different learners, and realistic given the amount of funding that sites receive.

The Suitability indicators are challenging for the Anglophone stream. The Anglophone stream is the only stream that does not target a specific Suitability indicator. Most learners in the Deaf, Francophone and Aboriginal streams enter the program with at least one Suitability factor, due to the target groups of these streams. As a result, in 2014-15, only 59% of Anglophone sites met

their Suitability standard, as opposed to 87% of Aboriginal stream sites, 86% of Deaf sites, and 76% of Francophone sites.[AD] Anglophone sites are also much more likely than other streams to rate the Suitability measure unfavourably.[SPS]

In addition, as mentioned earlier, **colleges often have trouble meeting the Suitability standard** due to the demographics of the learners they typically specialize in serving. Anglophone colleges face both difficulties at once; just 18% of them reached their Suitability standard in 2014.[AD] Partly as a result of this, just 39% of Anglophone college providers reached their overall SQS score – the lowest of any sector-stream combination.[AD] Appendix A: Case study on the PMF includes the story of one such provider and its frustrating dilemma between serving learners and meeting the Suitability standard.

Inappropriate weightings have incentivized serving the least-barriered learners

There are examples of providers denying services to learners who would negatively impact the site's Learner Progress scores.[CV, SPI, SPS] Preferentially serving the easiest-to-serve clients is are commonly known as "creaming." Appendix A: Case study on the PMF includes a narrative of one particularly extreme example. Another example is a service delivery chart that notes, for a particular site, that "Lower level learners will be accepted if they are able to satisfy the Ministry's suitability and progress matrix," suggesting that other potential learners will be rejected.

Service providers feel pressure to engage in "creaming", even when they do not do it, and are worried that they may need to in the future.[CV, SOI, SPI] One support organization expressed the potential for creaming in this way: "If you can't go on CaMS, or can't pay, then you aren't getting served."[SOI]
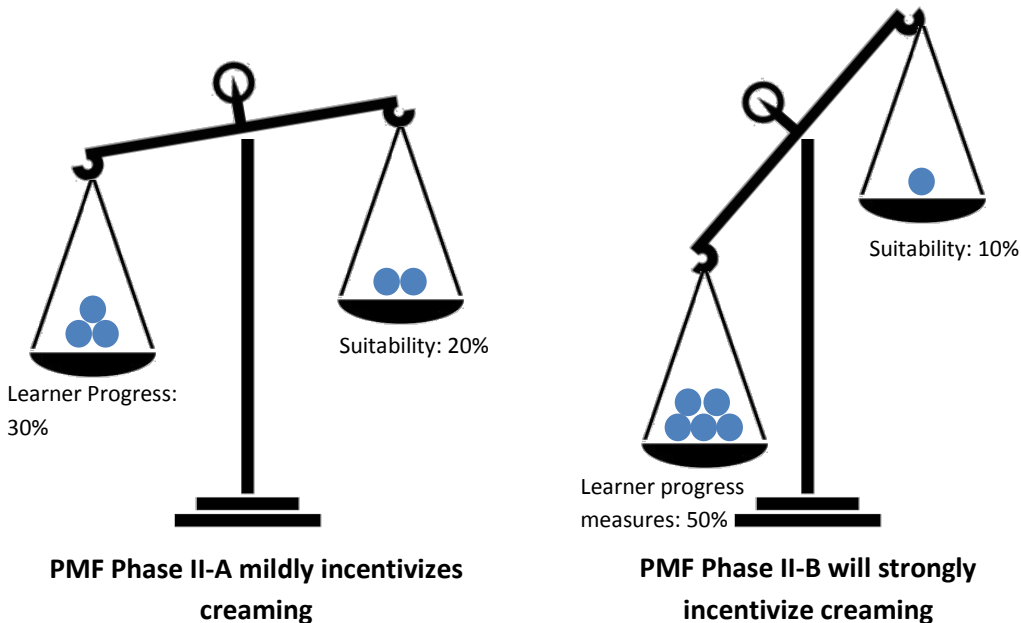
The Suitability measure is designed to mitigate this perverse incentive by rewarding providers for serving barriered learners.[195] This counterbalance has not always worked in practice, however, for two reasons:

1. **The Suitability measure does not adequately measure barriers**. There is conceptual confusion as to whether the Suitability measure is meant to measure **barriers to learning** or **who can most benefit from the program**. This is reflected in the fact that some potential barriers to learning (e.g. very low literacy level) are not included in Suitability scores, while other elements that are not necessarily barriers to learning (e.g. Francophone, Aboriginal) are included. Furthermore, the Suitability indicators are all weighted equally, despite the fact that certain of them (e.g. Deaf) constitute much larger barriers to learning than others (see Appendix C: Case study on the Deaf stream).

---

[195] Communication with Ministry staff.

2. **The Suitability measure has a lower weight than the learner progress measures**.
Currently, in Phase II-A of the SQS roll-out, Suitability counts for only two thirds as much
as Learner Progress, meaning that the overall incentive is to engage in creaming. In
Phase II-B, as currently planned, Suitability will count for only one fifth as much as the
three combined learner progress measures (Learner Progress, Learner Gains, and
Completion of Goal Path), potentially creating **a strong incentive to engage in creaming**
(see diagrams below).

Suitability: 20%

Learner Progress:
30%

Suitability: 10%

Learner progress
measures: 50%

**PMF Phase II-A mildly incentivizes
creaming**

**PMF Phase II-B will strongly
incentivize creaming**

Recommendation B-2: Ensure that the PMF allows for flexibility in meeting community and
learner needs:

- Clearly communicate that it is acceptable for sites to fall below the standard on certain
  measures as long as they meet the overall SQS standard. Review the language in the
  service provider guidelines that asks providers to commit to raise individual core
  measures that have fallen below the standard. Instead, for each core measure not met,
  ETCs should have a dialogue with service providers regarding whether this represents an
  area where they can improve, or a conscious strategy to fill a particular niche. Decisions
  stemming from this dialogue should be documented and filed by the ETC, and included
  by the provider in the business plan and QSARs.

- Redesign the Suitability measure as an explicit measure of barriers to learning; this must
  recognize low OALCF level as a barrier. Weight each Suitability indicator according to
  how great a barrier it poses to learners, based on how quickly learners with that barrier
  tend to progress in LBS. Weightings should also take into account the statistical
  relationships between different indicators so that certain barriers are not over- or
  undercounted. For instance, Deaf/Deaf-Blind may need to be weighted heavily in

recognition of the fact that Deaf/Deaf-Blind learners progress much more slowly on average.

- Ensure that the Suitability measure is weighted heavily enough to allow service providers to specialize in serving learners with barriers.

High-stakes assessments have created perverse incentives

Learner Progress, Completion of Goal Path, and Learner Gains tie a provider's SQS scores to the performance of learners on standardized tests. This creates the following two perverse incentives:

Pressuring learners into taking Milestones and Culminating Tasks that they do not want to take. A number of service providers admitted to this behaviour.[CV, SPI, SPS] Learners may not wish to take Milestones and Culminating Tasks because of the time and effort required, a fear of failure, and lack of feedback or credentialing afterwards.[CV, SPI, SPS] One site has resorted to giving gift cards to learners to convince them to take Culminating Tasks.[CV] Learners in the Deaf stream fail nearly a quarter of the Milestones (24%) they attempt,[AD] indicating that they are being given assessments that they are not ready for (see Appendix C: Case study on the Deaf stream). At a few sites, more than half of learners are not successful at *any* Milestones despite attempting more than one of them, again indicating that they are being given assessments that they are not ready for.[AD]

Being asked to take tests that they would prefer not to take frustrates learners[CV, SPI] and can even cause them to leave the program.[SPI]

Basing training content on the Milestones and Culminating Tasks. Providers sometimes design training content in part to prepare learners for specific Milestones and Culminating Tasks.[CV] They also sometimes teach learners the specific vocabulary that will be used in a Milestone.[CV, LDG, SPI] Other providers give learners "mirrored Milestones," "mirrored Culminating Tasks," or "pre-req Milestones" before they take the real assessment, allowing them to practice and receive feedback on a nearly identical task.[CV, SPI] The LNO tip sheet for Learner Progress encourages the use of these "mirrored Milestones."[196] In a discussion group, a learner noted that "a lot of what [instructor name] teaches is geared towards the Milestone."[LDG] These practices may be considered "teaching to the test," which is a commonly encountered and problematic consequence of standardized testing.[197]

---

[196] LNO. (n.d.). Tip sheet – Learner Progress.

[197] MAESD. (2011). Foundations of assessment.

PMF data is not yet trustworthy

The evaluation identified a number of concerns about the accuracy and integrity of the data collected as part of the PMF:

Reports may not accurately reflect EOIS-CaMS data. Although a Ministry interviewee reported that this problem had been fixed in the newest version of EOIS-CaMS,[MI] providers remain concerned that the reports generated in EOIS-CaMS do not always accurately reflect the data they have entered.[SOI, SPS]

Definitions are variable due to inconsistent guidance from ETCs.[CV, SOL, SPS] One provider said:

The fields are not clear. They can mean different things to different people. When I ask [my] ETC for clarity, they tell us to go to the data dictionary or say 'What do *you* think it means?' This is a system that has bad data and we are being measured against it.[CV]

This topic is explored in more depth in the next chapter.

Customer Satisfaction scores may be unreliable. As each satisfaction score is associated with an individual learner's file, they are never fully anonymous. Moreover, the question is often asked face to face by staff with whom the learner has a personal relationship.[CV] This may discourage learners from offering unfavourable answers. As one provider explained:

[In] the exit question we ask them about their satisfaction, [but] it's asked by the person they have worked with. It's ridiculous because they have built up a relationship with the learners. So even if something was wrong they are not going to say that to the person.[SPI]

This "interviewer bias" is well documented in the literature.[198] Satisfaction surveys conducted by neutral third parties reduce this bias.[199]

Recommendation G-4: Consider contracting out data collection for exit satisfaction and follow-up learner outcomes to a qualified third-party vendor, as is considered best practice for reducing biased responses. This will also reduce the data collection burden for providers.

---

[198] Bowling, A. (2005). Mode of questionnaire administration can have serious effects on data quality. Journal of Public Health 27(3):281-29; Hodlewsky, R. T., & Decker, F. H. (2002). The problem of bias when nursing facility staff administer customer satisfaction surveys. The Joint Commission Journal on Quality and Patient Safety 28(10):546-554.

[199] Hayes, B. E. (1998). Measuring customer satisfaction: Survey design, use, and statistical analysis methods. ASQ Quality Press. Pg. 105.

Gaming behaviours are widespread. Tying continued funding to performance measures always raises the possibility that providers will engage in "gaming the system" behaviours, especially in gray areas where procedures are left to the discretion of providers and it is not made clear what counts as legitimate versus illegitimate methods of boosting scores.[200] The Learner Progress and Completion of Goal Path measures appear to be particularly ripe for gaming. The most common practices which the evaluation uncovered were the following:

Gaming behaviour	Evidence	Potential impact on data integrity
Having learners complete "easy" Milestones they were already able to complete prior to enrolling in LBS	▪ Learners often complete Milestones extremely early on in their enrolment, indicating the learner already knew how to do the task before entering the program. Almost half of plan items (49%) with a Milestone task attained are completed in less than one week, and there are 43 sites in which the percentage is 80% or higher.[AD] ▪ A single Milestone (Milestone 54: "Log into a user account on a computer") accounts for 12% of all Milestones chosen, far more than any other Milestone.[AD] As a Level 1 Milestone that many learners may be able to do before entering LBS, it may be used as a way of quickly meeting Learner Progress standards.[MI]	▪ Overestimated learner progress
Giving many learners the same Milestone	▪ There are 35 service delivery sites that choose Milestone 54 ("Log into a user account on a computer") 25% or more of the time, and six sites that choose it more than 40% of the time.[AD] ▪ Sites sometimes embed Milestones within structured courses and thus give the same Milestone to an entire cohort of learners.[CV]	▪ Overestimated learner progress

---

[200] Perrin, B. (1998). Effective use and misuse of performance measurement. American Journal of Evaluation 19(3):367-379.

Gaming behaviour	Evidence	Potential impact on data integrity
Teaching to the test	▪ Providers sometimes teach learners the specific vocabulary that will be used in the Milestone.[CV, SPI] Other providers give learners "mirrored Milestones," "mirrored Culminating Tasks," or a "pre-req Milestone" before they take the real assessment, allowing them to practice and receive feedback on a nearly identical task.[CV, SPI]	▪ Overestimated learner progress
Waiting until learners are ready to pass a Milestone before entering them into EOIS-CaMS	▪ It is up to service providers' discretion when to enter learners into EOIS-CaMS, making this gaming behaviour possible and tempting. A few providers admit to it.[CV, SPI, SPS] ▪ In the College sector, learners take a median of *zero* weeks in order to complete a plan item,[AD] which is possible only if providers are waiting until learners are ready to pass a Milestone before entering them into EOIS-CaMS. Extremely fast Milestone completion rates[AD] noted above may also reflect learners not being entered into EOIS-CaMS until they are ready to do a Milestone.	▪ Delayed data entry ▪ Overestimated costs per hour and per learner
Keeping slow-progressing learners off of EOIS-CaMS	▪ Providers sometimes admit to this behaviour.[CV, SPI]	▪ No data on certain learners ▪ Underestimated enrolment ▪ Overestimated costs per hour and per learner

PMF data is not yet meaningful

Although each of the SQS measures is relevant and important, they are **not always seen by stakeholders as meaningful**.[CV, MI, SPI, SPS] More than half of providers (52% in the survey[SPS] and 11 out of 13 in-person consultation visits[CV]) feel that EOIS-CaMS, and by extension the SQS, fails to capture important elements of service. This perception is especially prevalent in the Aboriginal stream.[SPS] The most commonly named gaps are the following:

Item missing from SQS	Examples
Intake, initial assessment, and referral for learners who do not stay	"It doesn't capture the assessments that we do if the learner doesn't stay with us. An assessment takes one and a half hours and we get no credit for it if we refer them out afterwards."[CV] "Initial testing here may require a full day of work, but if the learner does not fit our program, this work cannot be captured by the database."[SPI]
The difficulty of working with learners with multiple barriers	"CAMS in no way captures the extraordinary work we do. Since no other agency deals with the hard-to-serve in our community, we have the challenge of working with the smallest local budget yet struggle to meet the needs of most time consuming clients. These clients will reach their goals eventually; they will get off of OW, become better parents, and grow stronger communities. They just need supports that aren't reflected in the onerous amount of data that is collected on CAMS."[SPS]
A meaningful measure of learner readiness to transition	"The only Culminating Task for independence is math/budgeting. It doesn't fit. But the learner is ready to move on. She learned what she needed."[CV]
Learner gains in soft skills	"We see success in self-worth after people have come to us feeling victimized. Success is who these people see in themselves. It's not about getting credits. For the Ministry is all about getting credits."[SPI] "Our students have had a thousand tough lives before they came to us. Especially poverty. Our reporting and data entry does not truly illustrate that. We have students who come in the first day high, an hour late, no books, no direction, and by the end they're really goal directed….They come in feeling stigmatized and they go out feeling empowered and goal oriented. There's nowhere to put that in CaMS. There's nowhere in CaMS to put that a student didn't use to make eye contact but now does and shakes your hand and says 'thank you.'"[CV]

Item missing from SQS	Examples
Qualitative information	"EOIS-CaMS is focused on developing statistics. We are focused on developing people. The two bear little relation to one another."[SPS] "If their future is a little bit brighter, it's not possible for the system to capture that, but that's what important, that's what makes us feel good. When someone says, 'Hey, when I'm in college I'm going to take culinary arts and start a restaurant someday,' how do we tell CaMS we've inspired someone to be a small business owner and contributed to society?"[CV] "Numbers paint a picture, but I would like to have the ETC have the time to visit and talk with students."[SPI] "It comes from bureaucrats trying to take a business model and put it into education, but it doesn't capture the true essence of what we do."[SPI]

Another concern is that **the meaning of the Suitability score is unclear.** Suitability is described both as measuring **barriers to learning** and as measuring **who can most benefit from the program**,[201] which are distinct and possibly even opposed constructs. Most Suitability indicators have (very small) negative correlations with learner outcomes, indicating that they constitute barriers to learning. In particular, having less than a Grade 12 education is negatively correlated with Milestone achievement. In contrast, self-identifying as Francophone has a small *positive* correlation with learner outcomes, indicating that these are individuals who can benefit more readily from the program.[AD] This makes it difficult to interpret the meaning of rising or falling Suitability scores.

Compounding this issue, Suitability scores give greater weight to some learner characteristics and less weight to others due to statistical relationships among the individual Suitability indicators. For instance, learners aged 45 to 65 are more likely to have been out of school or training for six or more years, and learners with less than grade 12 education are more likely to be receiving OW/ODSP.[AD] This reduces the meaningfulness of the overall Suitability score.

PMF data is not yet accessible

Support organizations expressed frustration that they cannot access EOIS-CaMS data to help providers improve their services.[SOI] Ministry staff from program policy and design and development, meanwhile, report that they can only access the data by going through a lengthy approval process.[MI] Even for those stakeholders who do have access, effectively analysing data

---

[201] MAESD. (2016). LBS: Service provider program guidelines.

from dozens or hundreds of sites may require data mining and analysis skills that organizations do not currently have.[MI, SOI]

PMF data has rarely been used for continuous improvement

Although most service providers reported being able to use EOIS-CaMS for evidence-based improvement,[SPS] the **evaluation uncovered very few concrete examples of such improvements** despite soliciting examples many times from numerous stakeholders across multiple lines of inquiry.[CV, MI, SOI, SPI, SPS] When pressed on how they use EOIS-CaMS data to improve their programs, providers almost always gave answers that indicated that **the primary use of the data was to ensure compliance with Ministry requirements** rather than continuous improvement per se.[CV]

Cross-tabulating the service provider survey with administrative data, it was found that for many SQS measures, a service provider's perception of the validity of a measure is strongly correlated with how well his/her site performed on that measure.[AD, SPS, 202] This means that, when a service provider falls below the standard on an SQS measure, the provider typically interprets this as meaning that the measure itself is flawed, rather than seeing it as an opportunity to improve. This strongly indicates that providers are keeping track of their SQS scores largely for the purposes of compliance rather than continuous improvement. Service providers sometimes stated this directly:

We can use it to determine whether we are meeting our effectiveness target (accountability to MTCU), but not whether we are actually teaching effectively (accountability to learners).[SPS]

The main use of the CaMS data [for providers] is to use it to defend their program to the ETCs. They don't use it to guide their program.[SPI]

> "It's manageable but it's not meaningful."
> – Service provider[CV]

---

[202] Correlations between a service provider's perceptions of a measure and his/her performance on that measure were statistically significant for Suitability (r=.484), Service Coordination (r=.224), Learners Served (r=.165), and overall Service Quality Standard (SQS) (r=.336). These correlations were present even when differences between sectors and streams were controlled for. Similar relationships were not found for Customer Satisfaction (likely because the high scores created a ceiling effect) and Learner Progress (for reasons that were not immediately clear).

The lack of usefulness of PMF data is **understandable given the liabilities listed earlier in this chapter**, especially its potential misalignment with program niches and its perceived lack of integrity and meaningfulness.

Ministry interviewees also reported problems in leveraging the data for useful purposes.[MI] They reported that the data is compromised by gaming, is poorly reflective of the gains of learners with low literacy, is difficult to access, and requires advanced data analysis skills to interpret.[MI]

A flawed roll-out has damaged the relationship between the Ministry and the field

Providers and support organizations frequently and strongly expressed that the roll-out of the PMF has eroded goodwill and the spirit of cooperation between the field and the Ministry:[CV, SOI, SPI, SPS]

[The PMF] is a tool for enabling and expanding a dysfunctional relationship between the funder and transfer payment organization.[SOI]

CaMS and the PMF promotes a fear of punishment and losing funding….What does that result in once you have a level of fear?[SOI]

That's where they will get us in the end, contract compliance….I used to be able to talk to [my ETC] about financial problems, but now if I talk to my ETC about it the ETC just says 'Well, you signed the contract to deliver LBS services, are you now saying you don't have the capacity to do so?'[CV]

Their lack of trust of the field is rather offensive. We've been in this business for 40 years. If you trust us, get off our backs. If you don't, then give it to someone you do trust. There are some agencies that really do need help or need to be put out of business. But most of them not. A confrontational, adversarial attitude is very, very debilitating….TCU has an attitude that we're crooks. They've changed their staff from supporters to cops. And it's very, very obvious.[CV]

> "TCU has an attitude that we're **crooks**."
> – Service provider[CV]

The implementation of the PMF has damaged the relationship between the field and the Ministry for the following reasons:

- The administrative burden of the PMF makes providers feel that their busy schedules are not respected and their time is not valued.[CV, SOI, SPI, SPS]

- The frequency and intensity of reporting is interpreted by providers to mean that the Ministry does not trust them to run their sites wisely or honestly.[CV, SPI, SPS]

- Difficulties in allowing for flexibility in service provision make providers feel that the Ministry does not understand or respect the diversity of learner needs and community contexts.[CV, SPI, SPS]

- The possibility that some sites will lose their funding for falling short of SQS standards (as communicated in, for example, the directed improvement letters) makes providers feel that they are being threatened rather than supported.[SPS]

- Unclear expectations as to what counts as legitimate vs. illegitimate ways to boost SQS scores make providers feel anxious about possible negative repercussions.[CV, SOI, SPI, SPS]

- A lack of visible results in terms of continuous improvement (as noted earlier) makes the PMF appear to providers to be a compliance monitoring tool only.

10.4 Conclusions

Successfully implementing performance management systems has proven extremely difficult in many programs and jurisdictions,[203] and LBS is not an exception. The evidence outlined in this chapter indicates that the impact of the PMF roll-out has, thus far, been predominantly negative.

The PMF has not yet succeeded in **driving quality service** because standards are sometimes misaligned with program niches and the data is not yet meaningful and accessible enough to be used for continuous improvement. The PMF has not yet succeeded in **ensuring that services are available to all learners who need them** because a flawed and underweighted Suitability measure has failed to counterbalance the tendency towards creaming. The PMF has not yet succeeded in **incentivizing service providers to help learners progress and achieve their goals (or refer out to other services)** because measures of learner progress and transition-readiness are imperfect, and anxiety over meeting requirements has led providers to improve scores rather than services.

Instead of these intended effects, the main impacts of the PMF roll-out have been time and effort diverted away from serving learners, anxiety and goal displacement among providers,

---

[203] Perrin, B. (1998). Effective use and misuse of performance measurement. American Journal of Evaluation 19(3):367-379.

and decreased openness and cooperation between the field and the Ministry. These unintended impacts can be expected to increase when funding is tied to performance.[204]

Goodwill between the Ministry and the field is the most unfortunate casualty of the PMF's flawed implementation. Rebuilding that goodwill is the most important – and most challenging – step in implementing a performance management framework that lives up to its promise.

Recommendation B-6: Do not tie funding to performance on the SQS until the issues identified in the implementation of the PMF have been resolved.

---

[204] Perrin, B. (1998). Effective use and misuse of performance measurement. American Journal of Evaluation 19(3):367-379; Umbricht, M. R., et al. (2015). An examination of the (un)intended consequences of performance funding in higher education. Educational Policy.

11 How effective are the Ministry's current support and funding structures?

11.1 Introduction

This chapter examines the extent to which the Ministry's supports are perceived to be effective by stakeholders.

Ministry responsibilities in administering the LBS program[205] include:

- Designing the program and setting program policy.

- Providing funding for service providers and support organizations in accordance with a transparent funding matrix.

- Providing guidelines that outline expectations of service providers and support organizations.

- Developing reporting requirements and tools.

- Ensuring transparency and accountability through business planning, monitoring, and evaluation.

- Establishing and communicating annual priorities.

- Providing guidance to clarify expectations.

- Identifying innovative practices in service design, delivery, and performance management (in collaboration with service providers).

The Ministry does not, however, prescribe the content or curriculum for individual service providers. Accordingly, it does not provide instructional content or resources, develop or deliver practitioner training, or facilitate information sharing across service providers. The support organizations are responsible for providing these types of service development supports.[206]

Overall, the supports provided by the Ministry are widely viewed as both insufficient and ineffective by stakeholders.

---

[205] MAESD. (2016). LBS: Service provider program guidelines.

[206] MAESD. (2016). Literacy and basic skills: Support organization program guidelines.

11.2 Current funding is considered inadequate

Across all relevant lines of inquiry, many service providers and support organizations **expressed frustration over inadequate funding**:[CV, SOI, SPI, SPS]

We haven't had a change in funding in about 10 years. When you consider the cost of inflation, we have basically lost 30% of our funding.[SPI]

I'm spending half of my time trying to find ways to keep the door open.[SOI]

Money is our biggest barrier….We're trying to get solid employment and stability to our students but we can't give it to our staff![CV]

> "**Money** is our biggest barrier."
>
> – Service provider[CV]

Service providers and support organizations reported that their funding has remained stable for many years.[SOI, SPI] Taking into account inflation, this means that they need to deliver the same level of service with approximately 3% less purchasing power per year.[207] This poses myriad challenges. Community agencies were particularly concerned about the difficulty of recruiting and retaining skilled staff with such limited resources.[SPS]

Providers and support organizations sometimes report being financially stretched to the point where they must rely on de facto charity such as unpaid staff hours,[CV] unpaid mileage claims,[SOI] a sympathetic landlord who undercharges for rent,[CV] in-kind supports from co-located infrastructure,[CV] and volunteers.[208] One provider noted that the site's budget only covers salaries; all overhead, including office/classroom space, insurance, printing, IT supports, and payroll services, are provided for free by the larger institution of which they are a part.[CV] Providers sometimes receive financial support from funding bodies other than MAESD. None of these supports are systematically reported to the Ministry, and providers are no longer required to disclose money gained by fundraising, meaning that the true costs of delivering LBS services are underreported.

For support organizations, budgetary constraints are exacerbated by the division of the $3,600,000 support organization budget across 27 support organizations with a median funding

---

[207] Inflation calculated between 2014 and 2004 using Inflation calculator
[208] Locations project data shows that there are, on average, about 1.7 volunteers per site.

of just $100,000 (in 2014-15).[209] This reduces efficiency by duplicating overhead costs such as office space, insurance, supplies, website hosting, and general administration.[SOI] One regional network with a budget below $100,000 noted that it costs almost 90% of the organization's budget to cover overhead.[SOI] Considering that SDNDF funding nearly doubled the amount available to support organizations each year, the decision in 2015-16 to re-direct SDNDF funds to other priorities, is likely to sharpen this concern over funding. Support organizations may have also lost financial support at the federal level due to the cancellation of Office of Literacy and Essential Skills (OLES) funding.

Stakeholders reported that low funding makes them feel ignored and undervalued by the Ministry.[CV, SOI, SPI, SPS] One service provider stated, "Funding need[s] to treat LBS like part of the EO group, not a poor country cousin that gets the leftovers."[SPS] Support organizations expressed frustration that project-based funding was cancelled in 2015-16,[SOI] which may reduce the ability of the LBS system to develop innovative programming, spread best practices, and align services with the OALCF (see chapter 7, which focuses on support organizations).

With more funding – or funding that is indexed to the cost of living – providers say that they would serve more learners,[CV, SPI] retain skilled staff,[CV, SPI] ensure a new generation of skilled instructors are hired,[CV] replace aging equipment and obsolete IT resources,[SPS] and provide more professional development for staff.[SPI, SPS] Support organizations would use increased funding to organize more professional development for providers, bring providers together face to face more often in order to coordinate services and disseminate best practices, and hire staff who have the skills to effectively analyse EOIS-CaMS data.[SOI]

Recommendation C-1: Index service provider and support organization funding to cost of living.

11.3 Stakeholders want a rationalized funding model

Currently, LBS transfer payment amounts are **based primarily on historical levels of funding**.[210] All Ministry interviewees agreed that this current funding model is dysfunctional, failing to drive efficiency, service quality, and equity.[MI] It has been identified as a concern across EO programs.[211] Providers and support organizations also called for a new funding model,[CV, SOI, SPI] emphasizing that this change is overdue: "We're waiting for a funding formula. We've been waiting a long time, maybe 10 years, for this. It's really needed."[SOI] Providers sometimes

---

[209] MAESD. (2016). LBS expenditures for support organizations 2014-15 to 2015-16 spreadsheet.

[210] MAESD. (2013). Memorandum to Barbara Simmons re: Literacy and Basic Skills service delivery funding model.

[211] MAESD. (2014). Employment and Training Services Integration broader consultation.

questioned why other LBS sites were receiving more money than they were without any apparent justification,[SPI] indicating a lack of transparency in current funding structures.

Stakeholders **want a funding model** that is transparent[MI] and equitable,[SOI, SPI] that provides a degree of stability and predictability in funding,[CV] and that does not incentivize providers of LBS and other services to compete with each other for clients.[MI]

Various stakeholders suggested basing funding on:

- the number of learners a site serves[SOI,CV] or its average daily enrolment,[MI]

- how many barriers a site's learners have and the intensity of services they require,[MI, SOI] and

- how well a site performs.[MI, SPS, 212]

Social service funding models tend to incorporate several mechanisms and criteria rather than a single criterion such as historical funding or funding per client.[213] A workable funding model for LBS may therefore need to combine the following elements:

- **Historical funding**. This preserves a measure of stability and predictability in the system. A buffer fund can be established to guarantee that no LBS site's funding will decrease during the first few years after a new funding model is adopted, as is done in the Ontario Ministry of Education's Child Care Funding Formula[214] and Alberta Family and Community Support Services.[215]

- **Pay per client served or average daily enrolment.** This allows flexibility for variable learner enrolment year to year. For instance, adult literacy programs in Massachusetts, the United Kingdom, and Australia are funded in this way.[IJ] It may also, however, cause service providers to compete with one another for learners and therefore undermine service coordination.[SOI]

- **Variable pay per client** depending on the characteristics of the client. For instance, the BC Ministry of Education gives more funding for "unique students" (e.g. Aboriginal students, students with special needs) and "unique districts" (e.g. small, rural, remote

---

[212] It was not specific whether this would be measured by the SQS or a different standard.

[213] Council of Alberta University Students. (2014). Funding frameworks: Understanding the methods used to finance post-secondary education in Canada.

[214] EDU. (2012). Child care funding formula technical paper 2013.

[215] Alberta. Children and Youth Services. (2010). Family and Community Support Services (FCSS) Program handbook.

communities).[216] In LBS, this could be used to accommodate the greater intensities of services needed by some learners, such as Deaf learners (see Appendix C: Case study on the Deaf stream). Funding per learner should be based on benchmarks of reasonable costs;[217] this, in turn, should be based on prevailing cost-per-learner trends across sectors, streams, regions, sizes, and delivery modes (see chapter 9, which focuses on effectiveness and efficiency).

- **Funding based on community needs**. For instance, the Ontario Ministry of Children and Youth Services Student Nutrition Program, Ontario Ministry of Education Child Care Funding Formula, and Alberta Family and Community Support Services give funding according to factors such as a community's population size, median income, social assistance caseload, educational attainment, cost of living, and whether the community is remote, rural, or predominantly Aboriginal or Francophone.[218,219] In the LBS program, paying according to community needs could be tied to the Literacy Service Planning process.

- **Special funding for exceptional unforeseen circumstances** such as a major layoff at a local employer or a sudden influx of newcomers from a particular cultural background into a community.

Reliable data is essential if funding is to be based on learner numbers, learner characteristics, community needs, and/or outcomes.[220] As such, it must be approached with extreme caution until issues with EOIS-CaMS data integrity are resolved.

Recommendation C-3: Adopt a rationalized and transparent funding model in consultation with the field and an expert in developing funding methodologies/models. This individual could be internal or external to the Ministry. The funding model may need to combine elements of:

- Historical funding, to preserve stability and predictability.

---

[216] British Columbia. Ministry of Education (2012). Funding school district operating grants.

[217] Brown, A. (2011). Benchmark funding model: The challenges and benefits of the benchmark funding model for non-profit social housing providers.

[218] Ontario. Ministry of Children and Youth Services. (2008). Student Nutrition Program: program guidelines.; Alberta. Children and Youth Services. (2010). Family and Community Support Services (FCSS) Program handbook.; EDU. (2012). Child care funding formula technical paper 2013.

[219] Deloitte's 2011 evaluation of the LBS program recommended a similar approach to funding.

[220] Sutherland, J. M. 2011. Hospital payment mechanisms: An overview and options for Canada. Canadian Health Services Research Foundation.

- Pay per client served, or average daily enrolment, to allow flexibility for variable learner enrolment year to year.

- Variable pay per client, depending on the characteristics of the client, in order to accommodate the greater intensities of services needed by some learners such as Deaf learners. Funding per learner should be based on benchmarks of reasonable costs; this, in turn, should be based on prevailing cost-per-learner trends across sectors, streams, regions, sizes, and delivery modes.

- Funding based on community need and demand, as measured by (for instance) population size, educational attainment, employment rates, and median income. This could be tied to the Literacy Service Planning process.

- Special funding for exceptional unforeseen circumstances such as a major layoff at a local employer.

Recommendation C-4: Exercise caution when using the EOIS-CaMS data to support design of a funding model (i.e. take into account the potential for inaccuracy and/or bias in important variables). Issues related to the EOIS-CaMS data (explored further in subsections 10.3 and 11.3) includes:

- Measures of learner progress are inaccurate for some learners. This affects Milestones, Culminating Tasks, and Learner Gains.

- Several of the variables may be inaccurate due to gaming behaviour. This affects start dates, number of learners, and may affect Milestones and Culminating Tasks.

- Providers are interpreting variable definitions differently. This affects learner characteristics, including most of the suitability measures, and referrals.

11.4 Service providers' training needs are not fully met

Although service providers seek and receive professional development from support organizations,[SPI, SPS] their **training needs are not fully met**. Many service providers (65%) reported that their instructors have additional training needs,[SPS] and providers consistently reported that inadequate professional development, training, and best practices were a barrier to their work.[CV, SPI, SPS] Providers most often requested additional training in the following areas:[SPS]

- OALCF-related training, such as how to meaningfully integrate Milestones and Culminating Tasks into existing curricula and how to serve learners on the Apprenticeship goal path;

- EOIS-CaMS-related training, such as data entry, interpretation of reports, and definitions (e.g. "completion");

- training on how to work with learners with barriers such as learning disabilities, mental health issues, substance use issues, and histories of violence; and

- OALCF and EOIS-CaMS training for new staff and regular refresher training for existing staff.

Providers sometimes reported that they are too overwhelmed with the day-to-day requirements of teaching, administration, and reporting to devote much time to professional development even when it is offered.[CV] Providers as well as support organizations reported that staff turnover among service providers makes it difficult to maintain organizational capacity, and that training must be offered multiple times as a result.[SOI, SPI]

In particular, **EOIS-CaMS technical supports are inadequate.**[CV, MI, SOI, SPS] EOIS-CaMS training materials are currently fragmented into at least 57 individual documents created by the Ministry[221] plus various others created by support organizations. Ministry-created Q&A documents are intended to clarify areas of confusion in EOIS-CaMS, but these documents are considered guides only and are not authoritative.[222] There is no EOIS-CaMS helpdesk, something which service providers frequently ask for.[CV, SPI, SPS]

All of this makes it difficult for service providers to access needed guidance on EOIS-CaMS and to trust the guidance they do access:

"All we have is big binders full of information on CaMS, rather than actual training."[SPI]

"I think [EOIS-CaMS] has the potential of being a powerful tool, but the lack of support, as well as a lack of consideration of user input is disheartening. I have never worked on a database system where we had absolutely no support of any kind either technical or application support."[SPS]

In the absence of a helpdesk or other centralized source of support, EOIS-CaMS technical support falls on entities who are not well positioned to provide it.[CV, SOI, SPS] Support organizations often are asked for support on EOIS-CaMS,[SOI] but they do not have access to the platform so they find it difficult to provide guidance.[SOI] Moreover, they are not empowered to give authoritative answers as to the proper protocols for data entry and reporting. ETCs are also asked for EOIS-CaMS support but may not be familiar with the details of the system.[SPS] One provider said, "Our ETC does his best to help us, but he doesn't know our end of the system so

---

[221] The EOIS-CaMS training documents relevant to LBS that Cathexis was able to locate included one data dictionary, eight desk aids, four Phase 2 training documents, four online modules, six user management documents, nine bulletins, a service provider user guide split into 12 individual documents, and 13 detailed reporting user guides. This is in addition to guides and tip sheets created by support organizations.

[222] Source: MAESD staff.

most often doesn't understand the questions or concerns we are presenting."[SPS] Another provider would "prefer to speak directly with a CaMS expert rather than having to go through the ETC. Even the ETCs find this process a bit tedious."[CV] Providers who are particularly skilled at navigating EOIS-CaMS have become de facto technical support staff for less skilled providers,[CV] taking time away from their intended roles.

> CaMS technical support falls on entities who are **not well positioned** to provide it.

11.5 ETCs are not always effective at supporting continuous improvement

Providers were split as to the supportiveness and expertise of ETCs. Although many providers (59%) reported that their ETCs give sufficient support and guidance, others felt that ETCs were not knowledgeable or involved enough to be helpful.[SPS] There was greater dissatisfaction in the College sector, Central and Northern regions, and Aboriginal stream.[SPS]

In various lines of inquiry,[CV, SOI, SPI, SPS] testimonials about ETCs ranged from glowing to critical:

I have probably the greatest ETC in the province. She's LBS's biggest supporter at the Ministry. She doesn't have a problem running something up the flagpole….I really see her as being part of the whole team.[SOI]

Our last three ETCs have all been absolutely terrific, highly supportive, and open to meaningful dialogue in helping us to genuinely improve the quality of our service delivery.[SPS]

ETCs now have literally zero knowledge of anything to do with literacy….Short of managing paperwork, they are absolutely not useful in any capacity to the program….What has been extremely painful for me as a literacy person is that I used to have real colleagues. Now, if I see my ETC once a year, I'm shocked.[SOI]

Consistency of guidance from ETCs was a major concern, as is described below.

> "ETCs **used to be consultants**. They're not consultants now, they are **contract enforcers**."
>
> – Service provider[CV]

11.6 Ministry expectations are not communicated clearly and consistently

It is difficult to find out what all of the expectations are

Service delivery and performance management expectations are set by the Ministry's corporate staff. The core expectations are articulated in organizations' funding agreements along with the program guidelines for service providers and support organizations.

The agreements and guidelines are supplemented by numerous other documents, including OALCF documents, business planning documents, EOIS-CaMS user guides, literacy service plans, directed improvement plans, QSAR forms, memos, requests for additional information, and Q&A documents. Some of these documents articulate additional expectations while others provide additional information about expectations that have been articulated elsewhere.

For instance, there is no master document that lists which reports are required of service providers and when they are due. A service provider looking for this information would have to find and consult the following Ministry documents:

- The Service Provider Agreement, which (in Schedule "D") mentions QSARs, Estimate of Expenditure Reports (EERs), Statement of Revenue and Expenditure Reports (SRERs), Auditor's Reports, and other reports (as requested), but does not specify due dates;

- The Service Delivery Organizations' Audit and Accountability Requirements for 2015-16, which includes detailed expectations and due dates for EERs and SRERs and mentions monitoring visits;

- The Quarterly Status and Adjustment Reports (QSAR) Instructions 2015-16, which includes detailed instructions and due dates for QSARs;

- The 2015-16 Business Plan Service Provider Site Instructions, which specifies the requirement to submit a business plan but does not make the due date clear;

- A September 2015 memorandum[223] which identifies the three levels of monitoring required under the Strategic Monitoring Framework and briefly describes the reporting requirements for each, but does not specify due dates; and

- One of three Self-Assessment Questionnaires (Paper-Based, Targeted, or Comprehensive, depending on which level of monitoring the service provider must undergo), which give additional instructions and specify that this form is to be submitted

---

[223] MAESD. (2015). Memorandum: Announcing the Strategic Monitoring Framework.

by the due date indicated on the correspondence received from the ETC (usually one week before the monitor).

The **sheer volume of documentation (we estimate relevant guidance documents to number over 100) makes it very challenging** for service providers, support organizations, and Ministry staff to know and understand all of the expectations.

Recommendation A-3: Communicate expectations and requirements clearly through a small number of curated, searchable documents. These documents should be updated whenever a Q&A or memo is released. Memos should notify the field of changes to these core guidelines, rather than constituting guidelines in themselves. (More details can be found in subsection 12.4: Recommendations.)

Some expectations are unclear

Despite the volume of documentation (and in part because of it), there are expectations that are unclear or confusing because the documents provide mixed messages, the information is difficult to find, the language is vague, or the Ministry has not provided guidelines. Only 35% of providers feel that the Ministry's program delivery-related support (information materials and communications) is sufficient.[SPS] Stakeholders said:

They have a tendency to say there are procedures for things, but no one knows where those procedures are.[SOI]

There's no one there to answer questions about any gray area of the program.[SOI]

No definitions = individual interpretations = inconsistent, meaningless data.[SPS]

The following are some areas of ambiguity that were often mentioned (this should not be considered an exhaustive list):

Area of ambiguity or inconsistency	Notes
Do providers need to reach the standard on each individual measure or just the overall SQS score?	The Ministry has not consistently communicated that providers only need to meet the overall SQS standard and do not need to meet each individual SQS standard.[MI] The service provider agreement and service provider guidelines do not make this clear. Moreover, the requirement to "commit to improve performance on any of the core measures in which they have fallen below the provincial standard," articulated in the service provider guidelines,[224] implies that each individual threshold should be met. Providers experience anxiety about Ministry consequences when they fail to meet individual SQS standards.[CV, SPI, SPS]
Is it acceptable to leave some learners out of EOIS-CaMS?	The Ministry has not provided guidelines about when to enter a learner.
How is "More than six years out of education/training" defined?	The Ministry has not provided an operational definition of "education" or "training." The definitions are left up to the discretion of the provider.
What counts as teaching to the test?	Deaf stream providers are unsure if instructing learners in relevant English vocabulary before taking a Milestone is a legitimate practice or not.[CV, SPI] The LNO tip sheet for Learner Progress advocates "mirrored Milestones," but these could be considered inappropriate.
What counts as "task-based"?	Providers are unsure whether academic training is "task-based" or not if the learner is preparing to transition to an academic program rather than a "real-life" activity.[CV]

Guidance from ETCs is inconsistent

ETCs are responsible for ensuring that service providers and support organizations within their regions meet expectations, and for providing any needed clarification about the expectations.

---

[224] MAESD. (2016). LBS: Service provider program guidelines

However, even among stakeholders who spoke well of their ETCs, a widespread concern was that **ETCs give inconsistent guidance about the Ministry's expectations,**[CV, SOI, SPI, SPS] a pattern that stakeholders find "very confusing and very frustrating."[SOI] For instance, one provider said:

We want the ETC to draw a line in the sand sometimes, but when you ask them about gray areas in the guidelines they just say 'refer to the guidelines,' but the guidelines are so broad. We want the ETC to tell us what not to do so that we don't get in trouble later – and this needs to be logged and documented.[CV]

When answers are forthcoming, they are sometimes inconsistent. Providers and support organizations noted that when they communicate with their colleagues, they find that messages have been different between different regions or different ETCs.[SOI, SPS] ETCs themselves reported that it is difficult to give consistent guidance.[MI] This is a major concern because wherever there is ambiguity in a performance management system, data integrity is compromised and the potential for strategic gaming behaviours is large.[225]

The lack of consistent guidance from ETCs is attributed to several interrelated factors:

- ETCs are **undertrained**.[CV, SOI, SPI, SPS]

- ETCs **monitor too many different EO programs**[MI] and so can no longer possibly have a solid grasp of any of them.[CV, SOI] Indeed, there are approximately 130 ETCs responsible for monitoring LBS sites, and more than half of those monitor just one or two sites,[226] indicating that LBS forms only a small part of their portfolio.

- There is a **high turnover rate** among ETCs.[CV, MI, SOI, SPI, SPS] Providers described having "a new ETC every year"[SPS] or "five ETCs in a year."[CV] Each new ETC must go through the process of becoming familiar with the LBS program and the nuances of particular service providers.[SPS] Providers in the Central region were the most likely to complain about ETC turnover.[SPS]

- The **regional model** fragments communication and decision making,[CV, SOI] ensuring that answers are different in each of the four regions: "It's hard to manage a provincial program with a regional hat on."[SOI]

- ETCs themselves **cannot get answers to their questions** due to the volume of documentation, inconsistencies across documents, and lack of direct communication channels with Ministry program and policy staff.[MI]

---

[225] Perrin, B. (1998). Effective use and misuse of performance measurement. American Journal of Evaluation 19(3):367-379.

[226] MAESD. (2016). LBS Service providers and SDS spreadsheet.

11.7 The field wants a more open, respectful, and cooperative relationship with the Ministry

There is a general sense in the field that the Ministry engages poorly with providers and support organizations.[CV, SOI, SPI, SPS] Stakeholders reported:

Stop ignoring people who are screaming for help to make for a successful program.[SOI]

It all starts with two-way dialogue. I find them to be incredibly insular. Their level of engagement is very poor.[SOI]

Everything at TCU is so secret. It's so different in other ministries. I work with five ministries so I see how respectful, consistent, etc. relationships can be. I haven't seen that at TCU for over 10 years.[SOI]

Everything feels punitive….If you send a report in two days late, you're put on directed improvement.[CV]

Recognize the wonderful work that is being done and stop focusing on the wrong things.[CV]

> "It all starts with **two-way dialogue**."
> – Service provider[SPI]

Reasons for negative perceptions of field-Ministry relations include:

Perceptions of the Ministry	Examples
Does not follow through on promises[CV]	The Ministry did not follow through on the stated commitment to release the 2011 LBS evaluation report to the field.[227]
	A funding model has been promised for many years but has not been delivered.[CV, SOI, SPI]
Is secretive[SOI]	2011 LBS evaluation report was not released to the field.[228]
	Support organizations were not advised when SDNDF funding was re-purposed to meet other MAESD priorities.[SOI]
Makes decisions without adequate consultation[CV, SPS]	While other support organizations were consulted in their development, regional networks were not involved in the development of the OALCF and PMF.[229]
	SDNDF funds were quietly re-purposed without consulting support organizations.[SOI]
Monitors providers heavily because it does not trust them[CV, SPI, SPS]	The volume and intensity of reporting requirements is interpreted by providers to mean that the Ministry does not trust them to operate their sites.[CV, SPI, SPS] A lack of visible results in terms of continuous improvement makes the PMF appear to be a compliance monitoring tool only.
Does not respect providers' time[CV, SOI, SPI, SPS]	The heavy burden of data entry and reporting does not take into account providers' limited resources.[CV, SOI, SPI, SPS]
	Providers express frustration about reports requested without warning at busy times of the year.[CV, SPS]
Does not understand how LBS works on the ground[CV, SOI, SPI, SPS]	The PMF roll-out has not respected the diversity of service provision.[CV, SPI, SPS]
	ETCs lack knowledge of adult education.[CV, SOI, SPI, SPS]
	In-person Ministry visits are rare and done mainly to check for compliance rather than to understand providers' work.[CV, SOI]
Undervalues the LBS program[CV, SOI, SPI, SPS]	LBS is not publicly promoted.[SPS]
	LBS's funding levels are small compared to ES.[CV, SPI, SOI]
	LBS funding declines each year in real terms.[SPI]

---

[227] Communication with Ministry staff.

[228] Communication with Ministry staff.

[229] Communication with Ministry staff.

The result is that service providers and support organizations are skeptical of the Ministry's intentions, anxious about revealing the challenges they face, and tempted to engage in various forms of secrecy and subterfuge as a form of "survival behaviour."[CV, MI, SOI, SPI, SPS]

Recommendation A-4: Rebuild and foster open and collaborative relations between the field and the Ministry. This can be achieved by taking the following actions:

- Release evaluation findings as a matter of course.

- Reduce reporting requirements to a minimum, and announce deadlines with plenty of lead time, in order to communicate that providers' time is valuable.

- Ensure that ETCs are trained in principles of adult education and literacy, and have the time to deeply understand the service providers that they monitor. LBS should be recognized as distinct from, and in many ways more complex than, other EO programs; this may require ETCs to spend a greater-than-proportionate amount of their time on LBS as compared to other programs on their portfolio. Understanding the complexity of LBS will allow ETCs to monitor providers with full awareness of the context in which they operate.

- Create more direct lines of communication between Ministry staff (program policy, design and development) and the field. This could take the form of a standing annual meeting with the field, and/or occasional in-person visits to service providers for the purposes of dialogue and learning.

- The process of building strong mutual relationships of collaboration and trust will represent a deep systems change, and is therefore a complex and lengthy process that must occur at multiple levels (systems, policies, and measures; norms, behaviours and practices; and beliefs and assumptions). To facilitate this process, engage an expert who specializes in supporting change within organizations and systems.

11.8 Stakeholders want stronger leadership and a clear vision

There is a sense that the overall vision of LBS has not been made clear:

Their building plan is not clear to anyone and therefore everything beneath that is chaos.[SOI]

The Ministry is only collecting so much information because they have no idea what they are trying to achieve….There is no strategy here.[CV]

Ministry interviewees, too, felt that LBS is ripe for rethinking and redesign.[MI] Many noted that redesign so far has focused on procedural issues rather than vision for what LBS should aim to achieve:[MI]

Leadership that I've seen thus far really has been focused on bringing LBS in line with other programs. That's management, control, and accountability as opposed to vision.[MI]

A **fundamental unanswered question** about the overall LBS vision was expressed by a Ministry interviewee: "**What is LBS in the business of? Employment or social inclusion?**"[MI] This question might be restated as follows: Is LBS intended to serve those who can *benefit* most from the program or those who *need* the program most? Is it an economic intervention designed to get people jobs or a social intervention designed to spread literacy as a human right, or both?

> "What is LBS in the business of?
> **Employment** or **social inclusion**?"
> – Ministry staff[MI]

To this point, literacy programs in other jurisdictions tend to fall into two categories:

- **Adult education** programs, where training focuses on helping learners build a foundation for academic success. Although a learner's ultimate goal may be employment, this is not the sole focus of the literacy program. This approach is taken in Alberta, British Columbia, Manitoba, Massachusetts, Michigan, Nova Scotia and Saskatchewan.[IJ]

- **Adult training** programs, where training focuses specifically on getting learners qualifications, certifications and skills to succeed in the labour force. This approach is taken in Australia, New Zealand, and the United Kingdom.[IJ]

It is currently unclear whether the LBS program is intended to be an adult education program (a broad program for anyone seeking literacy upgrading), or an adult training program (a narrower program specifically designed to build a more skilled workforce).

This question underlies a number of other questions about LBS: whether Suitability criteria ought to measure **barriers to learning** or **who would benefit most**; whether the Independence goal path belongs in LBS; whether learners who progress very slowly or who only are retaining rather than building skills should remain in the program; whether the program should be for those at the lowest levels or those at higher levels, or both; whether the program should target only those of working age or any age; and so forth.

Until the underlying question is answered, the program can be improved in only minor and superficial ways.

Recommendation A-1: Develop, in consultation with the field, a clear vision of what LBS is intended to achieve and whom it is intended to serve. If LBS is intended only to serve those who will eventually seek employment, consider what other program should serve Independence goal path learners. If LBS is intended to serve those who will ultimately seek employment, *and* those who are building literacy for other reasons, communicate that double mandate clearly and build it deeply into the program.

11.9 Conclusions

This chapter has shown that **current support from the Ministry is widely regarded as insufficient** in both its quality and its quantity. Addressing this will require fostering a much more tightly integrated LBS leadership within the Ministry, defining and communicating a clear vision for the LBS program, and rebuilding open, respectful, and cooperative relationships with the field.

12 Conclusions

12.1 The LBS program provides a needed, relevant service

LBS supports Ontario government priorities. There remains a great need for adult literacy and essential skills training in Ontario.[230] Investing in literacy supports a number of MAESD priorities,[MI] especially its mandate to foster transitions to employment and education and to support vulnerable populations.[231] There remain questions about whether youth and individuals seeking independence should be served by LBS.[MI]

Providers are responding to community needs. LBS providers use partnerships and data to identify and address community needs.[SPI] They are largely successful in meeting these needs[CPI] due to their ability to tailor services to a wide diversity of learners.[CV]

There are still unmet needs. LBS is reaching just 1% of adults in Ontario who could benefit from skills upgrading.[232] The fact that many adults who might benefit from the program do not seek it out may be due to stigma, insufficient promotion or a perceived lack of need on the part of potential learners.

---

[230] Statistics Canada (2013). Skills in Canada: First results from the Programme for the International Assessment of Adult Competencies (PIAAC).

[231] Wynne, K. (2014). 2014 mandate letter: Training, Colleges and Universities.

[232] Statistics Canada (2013). Skills in Canada: First results from the Programme for the International Assessment of Adult Competencies (PIAAC).

12.2 The LBS program is operating effectively and efficiently on the ground

Learners are getting what they want. Learners are highly satisfied with LBS, reporting gains in both skills and confidence.[LS] Learners value the program's nonjudgmental atmosphere, skilled staff, and close tailoring of learning activities to their individual aspirations.[LDG] Although implementation of some aspects of the OALCF is uneven, its learner-centred, transition-oriented, task-based spirit is embraced by providers and learners alike.[CV] Learners are successfully transitioning according to their goal paths.[AD]

Costs are reasonable. LBS's per-hour cost is lower than that of college education, which is impressive considering the individualized services that LBS offers. Areas of higher cost (the Deaf stream, the Northern region, and small sites) reflect the unique challenges of particular sites and learners.

e-Channel is a valuable service. e-Channel is a less intensive, lower-cost delivery model that is valued by learners.[LS] It is well suited to complement in-person LBS training, through blended learning for some learners and as a stand-alone option for others. Integration between e-Channel and in-person LBS could be stronger.[CV]

Support organizations provide critical supports. Providers rely on their stream, sector, service, and regional network support organizations to develop innovative materials, spread best practices, identify community needs, and maintain providers' organizational capacity.[SPS]

12.3 The administration of LBS is getting in the way of service quality

Funding levels are considered inadequate and unjustified. Funding levels that are declining in real terms pose a risk to the continued ability of the LBS network to provide quality services.[SPS] The current, historically-based funding model is considered dysfunctional and in need of replacement.[MI]

Ministry expectations are unclear. ETC turnover, regionalization, inadequately curated documents, and the absence of centralized leadership and vision (such as an EOIS-CaMS helpdesk) are creating a system in which providers receive conflicting messages on topics ranging from variable definitions to data entry standards to the overall vision of the LBS program.[SPS] This creates anxiety and confusion, damages relations between the field and the Ministry, and results in gaming and goal displacement.[CV] Support organizations are called upon to fill the leadership void, but lack the coordination and authority to do so.[SOI]

The burden of performance management currently outweighs its value. Accountability requirements impose a large burden on service providers due to the volume of reporting and the time-consuming nature of data entry on the EOIS-CaMS platform.[SPS] This is creating resentment in the field and taking time away from service provision.[SPS] Thus far, firm examples

of service quality improvements as a result of the PMF are few, while examples of perverse incentives are widespread.[CV] Providers need to see evidence of how the PMF can support them before they embrace it.

The SQS roll-out has inhibited program flexibility. Providers serve learners with diverse needs in a variety of tailored ways,[CV] making it difficult for a single set of standards to meaningfully capture program success.[SPS] SQS standards therefore create unrealistic expectations for some providers or expectations that can be met only by ignoring community needs, creaming, gaming, and teaching to the test.[CV] This is exacerbated by problematic assessment tools and a flawed, underweighted measure of learner barriers.[CV]

Poor relations are undermining continuous improvement. Service providers often feel that the Ministry misunderstands their work, undervalues their input, and neglects the LBS program as a whole.[SPS] Providers' anxiety over negative consequences from the Ministry has led them to engage in questionable data entry and teaching behaviours designed to improve scores rather than to improve service.[CV] Providers turn instead to support organizations as trusted confidantes, but support organizations are neither able nor allowed to offer authoritative guidance.[SOI]

The overall vision of the LBS program remains unclear. The decentralization of the LBS system into four regions, about 130 ETCs, and 27 support organizations means that there is no single source of guidance that can be relied upon. Deep questions about the vision of LBS remain unanswered. The deepest question may be the following: is LBS an economic intervention designed to get people jobs, a social intervention designed to spread literacy as a human right, or both?[MI] Answering this question will provide the necessary vision to meaningfully define program success, allow for diversity within the field, and re-establish open and collaborative relations between the Ministry and the field.

12.4 Summary of recommendations

A. Leadership and vision

A-1: Develop, in consultation with the field, a clear vision of what LBS is intended to achieve and whom it is intended to serve. If LBS is intended only to serve those who will eventually seek employment, consider what other program should serve Independence goal path learners. If LBS is intended to serve those who will ultimately seek employment, *and* those who are building literacy for other reasons, communicate that double mandate clearly and build it deeply into the program. For contextual information related to this recommendation, please see subsections 2.3, 2.4, 2.5, 3.2, 3.3, and 11.8.

A-2: Explore possibilities for centralized, consolidated, and consistent LBS leadership (leadership includes administration, program development, analysing and interpreting data, providing guidance to the field, ongoing consultation with the field, and offering overall vision). LBS leadership could be consolidated into a single body within or outside

of the Ministry. For contextual information related to this recommendation, please see subsections 7.5, and 11.5, 11.6, and 11.8.

A-3: Communicate expectations and requirements clearly through a small number of curated, searchable documents. These documents should be updated whenever a Q&A or memo is released. Memos should notify the field of changes to these core guidelines, rather than constituting guidelines in themselves. These core documents should comprise the following:

- **1 service provider guidelines document** that describes all administration guidelines, business planning requirements, reporting requirements, and general deadlines (though the exact dates may vary from year-to-year, and be specified in the service provider agreement).

- **1 service provider agreement** that includes details and specific deadlines for all accountability and reporting requirements. Identify specific report titles and dates in the agreement instead of referring providers to other documents.

- **1 support organization guidelines document** that describes all administration guidelines, business planning requirements, reporting requirements and general deadlines (though the exact dates may vary from year-to-year, and be specified in the support organization agreement).

- **1 support organization agreement** that includes details and specific deadlines for all accountability and reporting requirements. Identify specific report titles and dates in the agreement instead of referring support organizations to other documents.

- **1 OALCF guide** that consolidates and streamlines all core OALCF-related documents into a single, manageably sized document. This document should draw from the following resources:

    o Curriculum Framework (master document)

    o Curriculum Framework Conceptual Foundation

    o Foundations of Transition-Oriented Programming

    o Goal Path Descriptions (and introduction to Goal Path Descriptions)

    o Learner Plan Template (and instructions on how to use it)

    o Foundations of Assessment

    o Assessment Tool Evaluation Form

    o Selected Assessment Tools

    o Foundations of Learning Materials

    o Practitioners' Guide to Task-Based Programming

    o Checklist for Evaluating Learning Materials

    o Integrated Tasks by Goal Path

- o Supplemental Tasks by Goal Path

- o Supporting Learners through Service Coordination and Referral

- o Glossary

For contextual information related to this recommendation, please see subsection 11.6.

A-4: Rebuild and foster open and collaborative relations between the field and the Ministry. This can be achieved by taking the following actions:

- Release evaluation findings as a matter of course.

- Reduce reporting requirements to a minimum, and announce deadlines with plenty of lead time, in order to communicate that providers' time is valuable.

- Ensure that ETCs are trained in principles of adult education and literacy, and have the time to deeply understand the service providers that they monitor. LBS should be recognized as distinct from, and in many ways more complex than, other EO programs; this may require ETCs to spend a greater-than-proportionate amount of their time on LBS as compared to other programs on their portfolio. Understanding the complexity of LBS will allow ETCs to monitor providers with full awareness of the context in which they operate.

- Create more direct lines of communication between Ministry staff (program policy, design and development) and the field. This could take the form of a standing annual meeting with the field, and/or occasional in-person visits to service providers for the purposes of dialogue and learning.

- The process of building strong mutual relationships of collaboration and trust will represent a deep systems change, and is therefore a complex and lengthy process that must occur at multiple levels (systems, policies, and measures; norms, behaviours and practices; and beliefs and assumptions). To facilitate this process, engage an expert who specializes in supporting change within organizations and systems.

For contextual information related to this recommendation, please see subsections 10.3, 11.6, and 11.7.

B. Performance management

B-1: Continue to collect data and measure performance to support continuous improvement and public accountability at both the site level and the delivery system level. For contextual information related to this recommendation, please see subsection 10.2.

B-2: Ensure that the PMF allows for flexibility in meeting community and learner needs:

- Clearly communicate that it is acceptable for sites to fall below the standard on certain measures as long as they meet the overall SQS standard. Review the language in the service provider guidelines that asks providers to commit to raise individual core

measures that have fallen below the standard. Instead, for each core measure not met, ETCs should have a dialogue with service providers regarding whether this represents an area where they can improve, or a conscious strategy to fill a particular niche. Decisions stemming from this dialogue should be documented and filed by the ETC, and included by the provider in the business plan and QSARs.

- Redesign the Suitability measure as an explicit measure of barriers to learning; this must recognize low OALCF level as a barrier. Weight each Suitability indicator according to how great a barrier it poses to learners, based on how quickly learners with that barrier tend to progress in LBS. Weightings should also take into account the statistical relationships between different indicators so that certain barriers are not over- or undercounted. For instance, Deaf/Deaf-Blind may need to be weighted heavily in recognition of the fact that Deaf/Deaf-Blind learners progress much more slowly on average.

- Ensure that the Suitability measure is weighted heavily enough to allow service providers to specialize in serving learners with barriers.

For contextual information related to this recommendation, please see subsection 10.3.

B-3: Do not implement the Completion of Goal Path measure until and unless the concerns that providers have with Culminating Tasks (the time required to take them, low learner buy-in, unattainability for many learners) have been resolved. Alternately, remove Culminating Tasks as a component of the Completion of Goal Path measure and implement a more suitable measure of readiness to transition. For contextual information related to this recommendation, please see subsections 5.3 and 10.3.

B-4: Ensure that assessment tools can capture incremental progress for learners who make progress slowly. This can be done by developing more low-level Milestones and/or using the Learner Gains measure if appropriate. For contextual information related to this recommendation, please see subsection 10.3.

B-5: Eliminate Service Coordination as an SQS element for e-Channel providers, in recognition of the high number of blended learners and the inherent difficulty that e-Channel providers have in providing referrals for their learners. For contextual information related to this recommendation, please see subsection 6.6.

B-6: Do not tie funding to performance on the SQS until the issues identified in the implementation of the PMF have been resolved. For contextual information related to this recommendation, please see subsections 10.3 and 10.4.

B-7: Ensure that Learners Served targets are continuously updated, reflective of evolving community needs and the differing intensities of working with different learners, and realistic given the amount of funding that sites receive. For contextual information related to this recommendation, please see subsection 10.3.

B-8: In order to more accurately track the progress of transient learners, calculate Learner Progress per learner, not per service plan. This will allow the entirety of learning to be

captured. For contextual information related to this recommendation, please see subsection 10.3.

B-9: Continue to investigate measures of Learner Gains/skills development. Before implementing a measure, ensure that it:

- Can provide reliable information about learners' literacy and essential skills when a learner enters the program and when the learner completes the program.

- Is sensitive to changes in skill levels that could be expected within a typical program duration (two to eight months).

- Can be used with learners who have very low levels of literacy.

- Is appropriate for diverse cultural backgrounds, abilities (e.g. Deaf), learner goals, sectors, streams, and delivery modes.

- Is feasible for service providers to administer in the regular course of their intake and assessment process.

- Provides information that is meaningful and useful to service providers. Specifically, it should provide information that will help them:

  o Determine if a client is eligible and suitable for the LBS program;

  o Determine if a client is a good fit for their services, or should be referred to another service provider; and

  o Develop the client's learning plan.

- Is acceptable to both service providers and learners.

- Allows for some customization to ensure relevance to learners' goals (e.g. if learner wants to be able to balance their chequebook for greater independence, would want to assess skills that were mostly related to this, not skills like verbal communication).

For contextual information related to this recommendation, please see subsection 10.3.

C. Funding, efficiency, and sustainability

C-1: Index service provider and support organization funding to cost of living. For contextual information related to this recommendation, please see subsection 11.2.

C-2: Ensure that providers can spend the large majority of their time in serving learners. This can be achieved by reducing providers' administrative burden:

- Review the data entry requirements to ensure that only the most important administrative data is collected.

- Reduce the number of reports that providers must submit each year.

- Invest in usability and stability enhancements to EOIS-CaMS.

- Institute a centralized EOIS-CaMS helpdesk and consolidate EOIS-CaMS training documents into one searchable online resource that is continuously updated with Ministry-approved information.

For contextual information related to this recommendation, please see subsection 9.4.

C-3: Adopt a rationalized and transparent funding model in consultation with the field and an expert in developing funding methodologies/models. This individual could be internal or external to the Ministry. The funding model may need to combine elements of:

- Historical funding, to preserve stability and predictability.

- Pay per client served, or average daily enrolment, to allow flexibility for variable learner enrolment year to year.

- Variable pay per client, depending on the characteristics of the client, in order to accommodate the greater intensities of services needed by some learners such as Deaf learners. Funding per learner should be based on benchmarks of reasonable costs; this, in turn, should be based on prevailing cost-per-learner trends across sectors, streams, regions, sizes, and delivery modes.

- Funding based on community need and demand, as measured by (for instance) population size, educational attainment, employment rates, and median income. This could be tied to the Literacy Service Planning process.

- Special funding for exceptional unforeseen circumstances such as a major layoff at a local employer.

For contextual information related to this recommendation, please see subsection 11.3

C-4: Until issues with EOIS-CaMS data integrity are resolved, exercise extreme caution in designing a funding model. Issues related to the EOIS-CaMS data includes:

- Measures of learner progress are inaccurate for some learners. This affects Milestones, Culminating Tasks, and Learner Gains.

- Several of the variables may be inaccurate due to gaming behaviour. This affects start dates, number of learners, and may affect Milestones and Culminating Tasks

- Providers are interpreting variable definitions differently. This affects learner characteristics, including most of the suitability measures, and referrals.

For contextual information related to this recommendation, please see subsections 10.3 and 11.3.

D. The OALCF

D-1: Keep the OALCF as a flexible competency-based, transition-oriented framework. For contextual information related to this recommendation, please see subsection 5.8.

D-2: Review the merit of Milestones and Culminating Tasks in consultation with the field and with recognition of the field's concerns about these measures. In order to increase learner and employer buy-in, consider recognizing successful completion of a Milestone with an informal credential (such as a "badge") and attaching a formal credential to the successful completion of a Culminating Task. For contextual information related to this recommendation, please see subsections 5.3 and 10.3.

D-3: Develop more Milestones targeted towards particular tasks, learners, and goals. For contextual information related to this recommendation, please see subsections 5.3 and 10.3.

D-4: Invest in continued OALCF training for service provider staff, with emphasis on areas of difficulty (e.g. task-based programming, effective use of learner plans). For contextual information related to this recommendation, please see subsections 5.8 and 11.4.

E. e-Channel

E-1: Continue to fund e-Channel as a complement to, rather than replacement of, in-person instruction. For contextual information related to this recommendation, please see subsection 6.5.

E-2: Better integrate e-Channel services with in-person services for blended learners in order to reduce competition and duplication of efforts. For contextual information related to this recommendation, please see subsection 6.6.

E-3: Invest in efforts to increase awareness of e-Channel among service providers and potential learners. For contextual information related to this recommendation, please see subsection 6.6.

E-4: Support the full integration of Milestones into e-Channel's online platforms. For contextual information related to this recommendation, please see subsection 6.6.

E-5: If Culminating Tasks continue as part of the OALCF, ensure that they are fully deployed on e-Channel's online platforms. Do not implement Completion of Goal Path among e-Channel providers until and unless Culminating Tasks are fully integrated into online platforms. Alternately, remove Culminating Tasks as a component of the Completion of Goal Path measure. For contextual information related to this recommendation, please see subsection 6.6.

E-6: Invest resources in updating e-Channel platforms and reducing technical issues. For contextual information related to this recommendation, please see subsection 6.6.

F. Community needs

F-1: Continue to fund and support the LBS program as a key part of the Ministry's efforts to promote skill development. Communicate that LBS is a valued and integral part of the EO

system. For contextual information related to this recommendation, please see subsections 2.2, 2.3, 3.2, and 8.10.

F-2: Explore strategies to reach more potential learners. These strategies may include:

- Increasing demand for the program, for example by changing its name to deemphasize the stigmatized words "literacy" and "basic."

- Increasing awareness of the program, for example by launching a provincial promotion campaign which makes clear what supports are offered through LBS and the benefits that it can confer on learners.

- Increasing capacity, for example by identifying providers that serve high-demand areas, investing additional funds into those providers, and raising their Learners Served targets accordingly.

For contextual information related to this recommendation, please see subsection 2.5.

F-3: Continue Literacy Service Planning at the local level, with the involvement of relevant community partners. For contextual information related to this recommendation, please see subsection 4.2.

F-4: Develop capacity to roll up and analyse LSP documents regionally and provincially in order to systematically document trends and issues and respond quickly to emerging needs. Streamline the process by which Ministry staff can gain access to EOIS-CaMS data, and support organizational capacity in the Ministry to have the data analysis skills necessary to make the best use of EOIS-CaMS data. For contextual information related to this recommendation, please see subsection 4.2

F-5: Provide greater EOIS-CaMS data access to support organizations to ensure that they are able to support community-level planning for the LBS organizations they support. Build capacity among support organization staff to make the best use of this data. For contextual information related to this recommendation, please see subsection 7.5.

G. Evaluation

G-1: Consider focusing on a smaller number of data points with clear definitions and clear utility; train staff in both the Ministry and the field to use them effectively.

G-2: To better inform ongoing decisions about the program, conduct small, focused evaluations (with a small number of evaluation questions) about topics of particular interest (e.g. viability of e-Channel, efficacy of the PMF, value of the LSP process).

G-3: Conduct an annual survey of LBS learners rather than a larger survey every four years, as contact information is more likely to be current. Keep surveys short (no more than 10 minutes) and adjust questions year to year to obtain the type of information needed for decisions in that year.

G-4: Consider contracting out data collection for exit satisfaction and follow-up learner outcomes to a qualified third-party vendor, as is considered best practice for reducing biased responses. This will also reduce the data collection burden for providers. For contextual information related to this recommendation, please see subsection 10.3.

G-5: Analyse and report on the above data (focused evaluations on topics of particular interest, annual survey of LBS learners, exit satisfaction and follow-up) on a yearly basis.

G-6: Synthesize the results of these smaller evaluations and learner feedback on a regular basis (e.g. every four years) to pull out key themes and trends, and collect additional information only if needed.

G-7: To ensure transparency and foster trust, release evaluation reports, accompanied by a management response, to the field and the public.

G-8: Continue to strike a balance between quantitative and qualitative methods to understand both the numbers and the story behind them. Of particular importance are in-person visits to service providers (including both visits by third-party evaluators, as well as visits by Ministry staff). These are an indispensable source of contextualized, on-the-ground information.

G-9: Make the internal Ministry costs of LBS administration available to evaluators, to allow for complete and transparent assessment of program cost and efficiency.

13 Appendix A: Case study on the PMF

13.1 Introduction

Purpose of the case study

This case study examines **the impacts of the Performance Management Framework (PMF) on Literacy and Basic Skills (LBS) service provision**. Common impacts are illustrated and contextualized through three stories of service providers.[233] The case study concludes with a consideration of the wider implications of these impacts, and what can be done to redesign monitoring and accountability structures within the LBS program in order to avoid negative impacts while maintaining positive ones.

PMF background

The PMF is intended to:

- ensure the public accountability of the LBS program,
- drive quality service,
- ensure that services are available to all learners who need them, and
- incentivize service providers to help learners progress and achieve their goals (or refer out to other services).[234]

An important element of the PMF is the Service Quality Standard (SQS), which numerically measures the Effectiveness, Customer Service, and Efficiency of service providers. Each dimension has core measures nested within it, and is weighted to demonstrate value and tell a story about the quality of LBS delivery. The SQS was launched in 2012 with a subset of measures. Additional measures were added in 2014, with the full suite of measures (see graphic above) to be implemented at a yet-to-be-determined date.

---

[233] Each story draws upon a service provider interview or consultation visit conducted as part of the evaluation. To preserve anonymity, each story also incorporates some perspectives and pieces of information from similar sites. All site names are pseudonyms and identifying information has been removed.

[234] According to conversations with MAESD staff.

The SQS is high stakes for service providers, since stable and ongoing funding is dependent on their achieving the minimum standard of overall service quality. In addition, service providers must commit to improve performance on any of the core measures which are below the provincial standard.[235] Service quality is monitored by regionally-organized Ministry of Advanced Education and Skills Development (MAESD) Employment and Training Consultants (ETCs).

Impacts of the PMF on service provision

Service providers and support organizations provided examples of how the PMF had impacted services.[SPI,SOI,CV,SPS] Common impacts are listed in the following table.

Positive impacts	Negative impacts
▪ Increased awareness and understanding of the program's performance ▪ Ability to report on programs' performance to stakeholders ▪ Positive changes to services (e.g. moving to more transition-oriented programming) ▪ Increased learner confidence when learners pass a challenging Milestone or Culminating Task	▪ Deterioration of goodwill, openness, and cooperation between service providers and the Ministry ▪ Anxiety among service providers ▪ Decreased data quality due to gaming, secrecy and subterfuge ▪ Negative changes to services (e.g. denying services to eligible learners) ▪ Decreased learner confidence when learners fail a Milestone or Culminating Task ▪ Administrative burden, which in some cases has reduced the amount of time available for provision of LBS services

On balance, the impact of the PMF as currently implemented has been predominantly negative. Service providers gave many more—and more concrete—examples of negative impacts than positive ones.[236]

---

[235] MAESD LBS Service Provider Guidelines, effective June 1, 2015.

[236] Although 44 survey respondents (out of 244) indicated that the PMF provided useful information,[SPS] the information was used primarily to improve SQS scores and satisfy Ministry
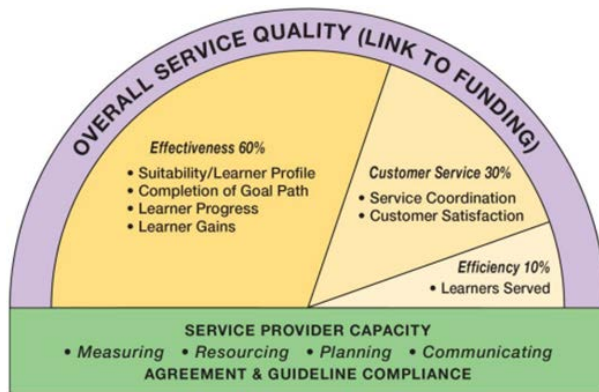
13.2 Stories of PMF impact

The following three composite[237] stories[CV, SPI, SPS] illustrate how these impacts have unfolded among service providers. The stories have been chosen to reflect a wide (though not full) range of sectors, streams, and regions, and to illustrate many of the most common impacts of the PMF. The stories are then analysed in order to understand the reasons for the impacts and identify the conditions needed for the PMF to make a positive difference for LBS services.

"We are being asked to fit a square peg in a round hole": The impact of the PMF on an Aboriginal stream service provider

The following is a typical story of an Aboriginal stream service provider's dilemmas and challenges in adapting to the PMF.

The Aboriginal Stream Community-Based Literacy Association ("The Association") is based on a reserve in rural Northern Ontario. The reserve is home to approximately 500 individuals, most of whom are survivors of the residential schooling system, or the children of survivors; most suffer from what program staff describe as historical trauma. Rates of suicide, substance abuse, Fetal Alcohol Syndrome, diabetes, poverty, and unemployment are well above provincial averages. There have been a dozens of deaths in the community this year, totalling almost one in twenty residents.

---

requirements, rather than to improve the quality of services.[SPI,CV] The evaluation team asked explicitly for, but received very few, concrete examples of service quality improvement.[SPI,CV,SPS]

[237] "Composite" means that, where possible, information is based on multiple sources and sites. This is done in order to ensure confidentiality. In some cases, other details have been included as well, in order to further disguise the identity of particular sites or stakeholders.

> Residents suffer from **historical trauma**.

Community members come to the Association with the goal of getting their high school diploma, finding employment in forestry or other industries, or gaining greater independence so that they can read notes from their child's school, budget for groceries, and the like. Some individuals who could benefit don't attend: the community is small and the LBS building houses no other programs, so it is impossible for people to enter the program without advertising to their neighbours that they have low literacy skills.

> Staff feel overwhelmed and undersupported.

Staff report feeling overwhelmed, understaffed, and undersupported. There are only two staff members, one full-time and one part-time, and finances are tight. Staff feel stretched thin between three heavy demands: instructing learners; completing the considerable social work needed to get learners to the point where they can learn; and keeping up with the Ministry's monitoring requirements.

> Staff close up early twice a month in order to catch up on **data entry**.

Staff feel that the Ministry's reporting demands are out of step with their $95,000 annual budget. They describe data entry into the EOIS-CaMS ("CaMS") client information system as extremely tedious and time-consuming, a "full-time job in itself," resulting in data that is "not at all useful" to them. They now close their office to learners early twice a month in order to get caught up on these requirements. The follow-up process is time-consuming because of the transience of learners. Successful follow-ups represent only a tiny percentage of the total, but all learners put on CaMS have to be followed up with.

The site's ETC has been unsympathetic to the practitioners' concerns about workload. In the words of the site's director, "I asked my staff how many clicks of the mouse [it takes to input a new learner on CaMS]. It was 180 or 190 clicks of the mouse. When I raised that to our [ETC] who does our sites visits, she says it gets easier with the next learner. She wasn't listening to me."

Staff report that they receive no "credit" in their SQS scores for a key community service that they provide: intake, assessment, and referral for clients who ultimately choose not to attend

LBS (and who therefore are never entered into CaMS). In the words of the director, "we help people find food to eat and apartments and escape abusive relationship and not take their own lives. You can't capture that in a number on a computer system."

> "We help learners **find food** to eat and apartments and **escape abusive relationships** and **not take their own lives**. You can't capture that in a number on a computer system."

The program meets the minimum standard for Suitability; most learners self-identify as Aboriginal and many are receiving social assistance. But the program has consistently struggled to meet the minimum standards for Learner Progress and overall service quality, causing a great deal of anxiety among staff. Staff point to a number of reasons why their scores suffer in these areas.

> Some residential school survivors enter the program in their 40s with almost no ability to read or write.

Firstly, many learners come in with very low levels of literacy. Some residential school survivors enter the program in their 40s with almost no ability to read or write. Some learners have Fetal Alcohol Syndrome. Some learners grew up speaking an Aboriginal language and know English only as a second language. Staff say that there are too few low-level Milestones for these learners' progress to be reflected on CaMS. Since all Milestones require a basic level of reading, there are no Milestones that a completely illiterate learner can complete, even if that learner is making progress. As a result, according to staff, "the PMF totally excludes those who are in the greatest need."

> "The PMF totally **excludes** those who are in the **greatest need**."

Secondly, learners acquire specific skills that are not captured in Learner Progress scores. Many learners are interested in jobs in forestry and require chainsaw or forklift operation skills. The provider has organized a multi-day, hands-on field training for learners in these skill areas, but there are no Milestones or Culminating Tasks that align with these very specific offerings. When the staff tried to give a Culminating Task to learners at the end of the field course, learners were confused and resistant because it bore little relation to what they had learned. Staff

report that, "Clients hate the Milestones. They don't meet up with what they want to learn....We see success in self-worth after people have come to us feeling victimized....'I don't feel stupid any more' – that's in a nutshell what we do, and what we'd like to be judged by."

Thirdly, many learners are transient, "accessing [LBS] in short bursts over many years." Many learners leave the community in the spring to work on fishing boats and in the fall to work in the harvest. Some learners leave to attend Sundance ceremonies that last up to a month. Learners with substance use issues may enter the program, relapse, drop out, and then return. When an Elder dies, the community hosts a three-day wake during which many programs on the reserve are shut down and LBS services are difficult or impossible to provide. Staff feel that the Ministry does not understand these factors: "The Ministry thinks all our students are laid-off brain surgeons. They think you can get them in and out [quickly] but there are many barriers that come up."

> Learners leave the program in the spring to work on **fishing boats** and in the fall to work in the **harvest**.

Staff complain that their ETC has changed several times over the last few years. Their current ETC does not understand the unique literacy needs of a First Nations community. Staff introduced sewing classes as a culturally appropriate, task-based activity to teach chart-reading and numeracy, but, according to staff, the ETC did not recognize this activity as aligned with LBS. Staff feel that Ministry requirements are "black and whiting" their program. This has made them distrust the Ministry: "They have people who [just] sit in room to see what LBS programs are doing. I have a huge trust issue with that....They should start listening to the people who know the students and know what they need, instead of making decisions that they think would be best. They have no clue what the students need."

> Staff feel that Ministry requirements are "**black and whiting**" their program.

> Staff keep the learners with the most barriers **off the books**.

Distrusting the Ministry and worrying about their SQS standards, staff have taken to a number of questionable strategies to hit their numbers. Staff are teaching to the test through the use of Milestone-specific preparation, and giving Milestones to learners who do not want to take them, which annoys the learner and slows down training. They have begun telling some learners that they cannot return to the program if they do not attempt a Milestone. Against the ETC's instructions, staff have begun leaving certain learners—those with multiple barriers who

will progress slowly—out of the CaMS system. They have started to seriously consider not allowing some learners into the program at all. Speaking about these strategies, a staff member said, "It's almost like they're not people anymore, they're numbers. How do you do that without hurting them?

Summing up all of these problems, staff say: "We are being asked to fit a square peg in a round hole." They feel they have to choose between pleasing the Ministry and pleasing the community, and as a result they are deeply anxious about the future of their organization.

"We are now an employment program": The impact of the PMF on a suburban school board

The following is a somewhat a typical story: most cases encountered during the evaluation were less extreme than this, but this story illustrates how some service providers have used the performance data to change their services.

Suburban Ontario District School Board is located just outside of an urban area in Eastern Ontario. There is a director and six staff members.

The director reports that the introduction of the PMF, CaMS, and the Ontario Adult Literacy Curriculum Framework (OALCF) caused "some chaos at the beginning" as the organization figured out how to accommodate the new standards, but the transition to the new framework is now mostly complete. The changes to the program were dramatic. In the words of the director: "Before, we thought of ourselves as adult education…With the PMS we are now an employment program and our instructors see that and we discuss it with our learners that this [program] is on the path to future employment."

> The changes to the program were **dramatic**.

This paradigm shift entailed many smaller changes to the program. The program no longer accepts learners in the Independence goal path. An offering for adults with developmental disabilities was cancelled because these learners were simply maintaining their skills rather than increasing them towards a future goal. There were "lifers" in the program who had been attending for many years, but had no realistic prospect of finding work; those learners no longer attend.

> The program no longer caters to people with **no real prospect of employment**.

> Services to the elderly, the developmentally disabled, and emergent learners have been **discontinued**.

Computer classes for senior citizens were discontinued because these learners were above the age favoured in the Suitability measures: "They don't fall under our mandate [now]….When you look under our performance management measures, a senior in their 70s doesn't fit into our program even though they don't have the money to go to a class." One-on-one tutoring was discontinued because the time and costs required to make this happen are "not considered in CaMS."

There was significant staff turnover as a result: staff "who weren't willing to alter the way we were working" left and were replaced with those who could adapt to the new standards.

Now, the program mainly serves learners who can increase their skills rather than maintain them. "Emergent" learners—those with lower literacy levels—are no longer targeted. One-on-one tutoring was replaced with short, focused programs offered simultaneously to a group of learners. The program caters to those who come to the program fully prepared with a specific, clear, short-term goal that leads towards eventual employment. Staff stopped spending time helping learners to figure out what their long-term goal is, since all learners are now seeking employment in the short- or medium-term. In the words of the director, "We want to ensure there is a progression out of the program."

> "We want to ensure there is a **progression out of the program**."

Although the director is ambivalent about some of these changes—especially the elimination of the computer class for senior citizens—she is positive overall about the impacts that the PMF has made. The increased monitoring has improved the quality of service provision across the province, and standardized the program so that "we're all talking the same language now." She does not mind the reporting requirements: "We all need to be evaluated because that's just the way the world runs."

> The director is **positive overall** about these changes.

She also sees the CaMS data as accurate and useful. The staff are able to use the CaMS learner plan "to follow the story of [the] learner" and to report their activities to the Board, not just the Ministry. They consult the regional roll-up reports to understand how their program compares to other programs in the area, in order to see where they can improve. Milestone Tasks—the measure of Learner Progress—are useful for tracking learners' achievements, and staff have used them as documentation of prior learning in support of learners' applications for Maturity Credits. Although site visits take a lot of time and effort, they appreciate them because they allow the ETC to see firsthand the ways in which the site has found success.

"We're more accountable to the Ministry than we are to students": The impact of the PMF on an Anglophone college program

The following is a typical story of an Anglophone stream, College sector service provider's dilemmas and challenges in adapting to the PMF.

English-Speaking Community College of Ontario ("The College") is an Anglophone-stream, College-sector LBS program located in an urban area. It has eight staff and benefits from its co-location with a variety of student services.

The College's catchment area is served by many different LBS service providers catering to a wide variety of learner profiles including: all goal paths, all OALCF levels, all streams, and many other more specific demographics such as Francophone newcomers, women living in poverty, at-risk young adults, and adults with developmental disabilities. Through the Literacy Service Planning process, the area's regional network has helped these programs specialize in what they do best and avoid competition and duplication of services.

> The program's niche among local LBS providers is **college preparation.**

Within this landscape of local LBS providers, the College has found its niche as a provider of academic upgrading services for learners who wish to enter specific college programs; indeed, a large majority of the program's learners are in the Post-Secondary goal path and none are at the lowest levels of literacy. This mandate is reflected in the area's LSP and Service Delivery Chart, which defines the College's client focus as "preparation for college" and its anticipated OALCF levels as 2 and 3.

> Learners who do not fit the profile are referred to sites that can **better serve them**.

Staff have well-developed methods for referring learners who do not fit this profile to other programs in the city that can better serve them. Deaf individuals are sent to a Deaf stream LBS program across the street. Learners below OALCF level 2 (as determined by a standardized exam at entrance) are sent to a school board program with which the College has close ties. Learners who become anxious or disruptive in a classroom setting, or who need more individualized instruction, are often referred to a community-based program that can offer one-on-one tutoring. Staff emphasize that they are fully willing and able to serve learners with lower levels of literacy and multiple barriers, but that they have chosen to focus their program elsewhere.

> **Suitability scores** suffer as a result.

As a result of these choices, the site—like 39% of Anglophone College sites[AD]—has not met its overall SQS score, and has in particular always fallen well below the Suitability threshold. The site has no Deaf learners, because they are referred to a program that serves Deaf learners; very few Francophone learners, because they prefer to go to the local Francophone service provider; and only a handful of Aboriginal learners, because those learners tend to seek LBS services at a Friendship Centre in the same city. The site also has few learners in the 45-65 age range, as those learners are far less likely to seek post-secondary education: "We'll never perform well on that. We've tried to reach out to those individuals but they usually don't come."

> Lack of **academic Milestones** has led to low Learner Progress scores.

The site also struggles to meet its Learner Progress standard. Staff explain that learners are indeed making progress and reaching their goals (staff often run into former learners around the College who are now attending the post-secondary program of their choice), but there are few Milestones and no Culminating Tasks that align well with the academic skills that learners need in order to attend college. In addition, learners are highly resistant to taking Culminating Tasks: they take up to three hours to complete, do not lead to a credential, and learners are already exhausted from the demands of their studies, jobs and family commitments. Staff worry that they will eventually need to pay learners to take them.

Staff worry that they may need to start **paying learners** to take Culminating Tasks.

Although confident that the information they record in CaMS is accurate, staff do not feel that it is worth the effort. The College already has an in-house student information system, and all staff agree that this system is easier to use than CaMS and more suited to their needs. CaMS data entry represents a large duplication of work that is resented by the instructors who take on the bulk of the task: in the words of one instructor, "This job has become more about data entry than about teaching."

"This job has become more about **data entry** than about teaching."

The College staff have a friendly relationship with their ETC, but do not find him to be a significant source of support: "ETCs should be more present and less procedural, more collaborative. Don't just read from the guidelines." They feel that the PMF does not reflect their niche as a provider of LBS services for younger learners seeking academic upgrading: "Somewhere within the PMF or CaMS it needs to acknowledge that we're a college system, not community-based, and that makes a difference. Some standardization is not a bad thing, it's good, but there are nuances to our delivery and outcomes that need to be taken into account."

"Somewhere within the PMF or CaMS it needs to acknowledge that **we're a college**… and that **makes a difference**."

In the words of the program's director, "We're more accountable to the Ministry than we are to students."

13.3 Analysis of contributing factors

The challenges described in these stories are not unusual within new performance measurement initiatives, and are among the reasons that such initiatives have often been abandoned in public and private organizations from the 1960s until the present.[238] The literature strongly suggests that these impacts intensify when high-stakes pay-for-performance systems are introduced.[239]

The three stories in this case study provide some insight into factors that contribute to the negative effects:

Inflexible application of the standards. Service providers are highly motivated to meet Ministry expectations, and they also have a strong commitment to address the needs of their learners.[CV, SOI, SPI, SPS] In theory, this should set the stage for the PMF to have a positive impact. However, a rigid implementation of quality standards hampers service providers' ability to flexibly respond to learner and community needs, creating a **trade-off between serving their learners/community and serving the Ministry**. When practitioners choose the former (as in the story of the college), they fall afoul of their ETC. When they choose the latter (as in the story of the school board, or to some extent the story of the Aboriginal stream provider), they fall afoul of their learners. Whichever way they choose, the choice itself is a Catch-22 that leaves service providers feeling anxious, misunderstood and unsupported. It makes practitioners resent the Ministry and lays the foundations for gaming, secrecy, and subterfuge.

Insufficient or inappropriate guidance. The negative impacts described above are exacerbated in cases where the standards are applied by an ETC who has limited understanding of the learners and community that a provider serves, and who is not deeply familiar with the principles of adult education, and who therefore provides minimal—or even inappropriate—guidance.[CV, SPI, SPS]

The failure of the Suitability measure to incentivize serving vulnerable learners. In theory, the Suitability measure mitigates against the risk of creaming, making it possible for providers to serve slower-progressing learners while still meeting their overall SQS score. However, as illustrated by the story of the Aboriginal stream service provider and the school board service provider, this has not always worked in practice. This is in part because the Suitability measure

---

[238] Perrin, B. (1998). Effective use and misuse of performance measurement. American Journal of Evaluation 19(3):367-379.

[239] A recent study of Indiana's public universities found that performance funding did not increase the number of graduates, and instead led to declining admission rates and increased selectivity. (Umbricht, M.R. et al. (2015). An examination of the (un)intended consequences of performance funding in higher education. Educational Policy.)

is currently weighted lower than the Learner Progress measure, and will be weighted far lower than the combined measures of learner progress in Phase II-B of the PMF roll-out.

Difficulties in measuring learner progress and transition-readiness. There are three challenges with Milestones (the assessment of learner progress) and Culminating Tasks (the assessment of transition-readiness):

1. Few Milestones and Culminating Tasks are suitable for learners with very low levels of literacy, making it difficult for service providers to demonstrate the progress that these learners are making. This creates a **disincentive to serving learners with low levels of literacy**, who, it could be argued, are in greatest need of the LBS program.[CV, SOI, SPI, SPS]

2. The Milestones and Culminating Tasks do not align well with some of the programming being delivered by service providers. When practitioners offer contextualized learning opportunities, they may find that there are no Milestones that align with that programming. If they want to demonstrate learner progress, they must then use a Milestone that is not relevant to their instruction, which is not in the best interest of their learners. This creates a **disincentive to using contextualized learning**.[CV, SOI, SPI]

3. Because of the need to demonstrate progress, service providers may begin to **pressure learners to do assessments** that they are not comfortable doing.[CV, SOI, SPI]

Data collection, data entry, and reporting are time-consuming. Considerable time is required for data entry into CaMS, learner follow-ups, site visits, and other performance management activities. This reduces the time available for other tasks, such as program planning, instruction, and professional development.[CV, SOI, SPI, SPS]

13.4 Conclusions

The PMF is designed to give service providers the standards, the incentive and the data necessary to drive continuous improvement. At present, it is not fulfilling these functions, and may in fact be undermining service quality. However, there remains a need for a performance management framework that can support both accountability and continuous improvement.

The findings of this case study point to the need for **a more flexible application of performance standards**. **A more accurate measure of learner barriers** needs to be developed and weighted at a level that truly incentivizes serving the most vulnerable Ontarians. **Alternative measures of learner progress** are needed for learners with very low levels of literacy, and issues with the relevance of the Milestone and Culminating Tasks will need to be resolved. Finally, the quality standards need to be applied by staff or **ETCs with a strong understanding of adult education**, and who remain in their role long enough to establish mutual understanding and trust with service providers. Finally, **streamlined data entry and reporting requirements** will ensure that the performance measurement does not detract from service provision.

It is not advisable to use the SQS for performance-based funding decisions until these issues are resolved.

14 Appendix B: Case study on e-Channel

14.1 Introduction

Purpose of the case study

This case study explores possible future role(s) for e-Channel within the Literacy and Basic Skills (LBS) program, based on an analysis of the kinds of training offered by e-Channel providers, the characteristics of e-Channel learners, the reasons that learners choose to (or choose not to) access these services, and the benefits of e-Channel. Recent literature is included in order to contextualize these findings within the larger field of online learning.

e-Channel background

e-Channel is the **distance learning service** within the LBS program. Following the Ontario Adult Literacy Curriculum Framework (OALCF), it serves learners in five goal paths (Employment, Apprenticeship, Postsecondary Education, Secondary School Credit, and Independence) through instruction in six competencies.

e-Channel was launched in 2007 following an online learning pilot project. Funding was initially provided to three providers (covering the Anglophone, Francophone, and Aboriginal streams), with a College sector provider added in 2008 and a Deaf stream provider added in 2012.

There are currently five e-Channel service providers:

- Anglophone: **The LearningHUB**, operated by Avon Maitland District School Board;

- Francophone: Formation à Distance **(F@D)**, operated by the Coalition ontarienne de formation des adultes (COFA);

- Aboriginal: **Good Learning Anywhere**, operated by the Sioux-Hudson Literacy Council;

- Deaf: **Deaf Learn Now**, operated by George Brown College; and

- Academic & Career Entrance (ACE): **ACE Distance**, operated by the College Sector Committee for Adult Upgrading.

Learners may access e-Channel training on its own, or in conjunction with in-person LBS training. Learners accessing LBS both online and in-person are known as **blended learners.** In

2014-2015, there were approximately 5,500 e-Channel learners, which represents about 13% of all LBS learners.[AD] We estimate that approximately one third of e-Channel learners are blended learners, given that this proportion learn about e-Channel from an in-person service provider.[LS, 240]

14.2 How does e-Channel differ from in-person LBS?

Differences in learner characteristics and habits

Compared to in-person LBS learners, e-Channel learners:

- Are more often **female** (69% e-Channel vs. 56% in-person).[AD]

- Are slightly **older** (see chart).[AD]

- Have attained **higher levels of educatio**n (e.g. 10% of e-Channel learners have some college vs. 5% of in-person learners) (see chart).[AD]

- Are less likely to have a history of interrupted education (37% e-Channel vs. 53% in-person).[AD]

- Are slightly **more often unemployed** (59% e-Channel vs. 53% in-person).[AD]

- Are more likely to be a **person with a disability** (12% e-Channel vs. 9% in-person), **visible minority** (10% e-Channel vs. 6% in-person), **newcomer** (7% e-Channel vs. 5% in-person), or **Francophone** (10% e-Channel vs. 7% in-person).[AD]

- Have a slightly higher percentage of learners in the Independence goal path (17% e-Channel vs. 12% in-person[AD]).The proportion of e-Channel learners in other goal paths is similar to in-person: Postsecondary Education (37%), Employment (26%), Secondary School Credit (17%), and Apprenticeship (4%). The learner survey also showed that e-Channel learners are more likely than in-person to have independence as a personal ambition (25% e-Channel vs 3% in-person).[LS]

---

[240] Existing 2012-2013 and 2013-2014 LBS administrative data did not allow for the matching of user IDs for e-Channel and in-person data sets to produce a more precise number of blended learners. LBS data for more recent years should have this capability.

Table: Age breakdown of LBS learners[AD]

	in-person	e-Channel
16-18	3%	<1%
19-24	27%	14%
25-44	44%	53%
45-64	22%	28%
65+	4%	5%

Table: Highest education level attained by LBS learners before LBS training[AD]

	in-person	e-Channel
Grade 0-8	14%	10%
Grade 9	10%	7%
Grade 10	13%	12%
Grade 11	12%	10%
Grade 12	28%	26%
OAC	<1%	1%
Some apprenticeship	1%	1%
Some college	5%	10%
Some university	2%	3%
Certificate of apprenticeship	1%	0%
Journeyperson	<1%	0%
Certificate/diploma	11%	13%
Applied degree	<1%	0%
Bachelor's degree	4%	5%
Post-graduate	1%	1%

e-Channel learners also have somewhat different **training schedules and habits** than in-person learners. Compared to in-person learners, e-Channel learners:

- **Spend less time training per week.** The majority (91%) of e-Channel learners estimated that they spent between 1 and 5 hours per week in training, while the majority (81%) of in-person learners spend 6 or more hours per week in training.[AD]

- **Attend training for a much shorter period of time.** e-Channel learners spend a median of eight weeks (about two months) in LBS programming, while in-person learners spend a median of 24 weeks (just under six months).[AD]

- **Receive fewer hours of service overall.** e-Channel learners receive a median of 54 hours of training versus 207 hours for in-person.[AD] Almost half (47%) of e-Channel learners take just 2-5 courses.[LS]

Differences in service provision

e-Channel training differs from in-person LBS training in the following ways:

> "Courses are not tailored to the student….We develop courses to have a **broad appeal**."
>
> – e-Channel provider[CV]

Courses are more structured. e-Channel providers offer structured courses as the major method of training, rather than the more tailored training that many in-person providers offer. Examples of courses offered range from foundational courses (e.g. math, communications, literacy, self-management, computer fundamentals) to more specialized courses (e.g. business math, Introduction to Excel, Driver's education, customer service).[CV]

Three e-Channel providers offer "synchronous" courses wherein some learning activities happen in real time and learners are expected to log into a virtual classroom at particular times to take part in these activities under the supervision of an instructor. Four providers offer "asynchronous" courses wherein learners complete training on their own schedule.[CV]

Online tools expand instructional options. The online learning environment provides service providers with the option of including instructional options such as gamification of learning, or online assessments that can provide instant feedback to the learner and track the learner's progress in much more detail.

Assessments are more standardized. e-Channel providers tend not to customize their assessments to individual learners. Initial assessments are used to help decide which courses a learner should be placed in. Ongoing assessments such as quizzes, tests or assignments are the same for all learners taking the same course. Milestones are generally chosen according to what course a learner enrolls in, rather than the learner's individual characteristics. Exit assessments do not take place for e-Channel learners; some e-Channel courses have final exams but these are administered at the end of a course and not necessarily at the end of a learner's e-Channel training. e-Channel providers know when a learner is ready to exit the program when he or she has completed all the courses on his or her learner plan.[CV]

> Culminating Tasks are **unavailable** to e-Channel providers.

There are fewer OALCF assessments to choose from. According to e-Channel providers, Culminating Tasks are currently unavailable online.[CV] Some Milestones are also unavailable online, and blended learners may have already taken the most suitable Milestones through their in-person LBS provider, leaving fewer options for e-Channel providers seeking to demonstrate their learners' progress.[CV]

There is less contact between learners and instructors. The lack of face-to-face interaction, combined with the higher learner-to-trainer ratio, and the fact that e-Channel learners are geographically spread across Ontario means there is less contact between instructors and learners. Instructors are less familiar with individual learners, their needs and their contexts.[CV] This reduced contact between learners and instructors has been associated in the literature with weaker learner persistence and retention.[241]

> "Referring is a very **personal** service."
> -e-Channel provider[CV]

Meaningful referrals are more difficult. The lack of contact between instructors and learners makes it difficult to informally identify learners' barriers and potential wraparound supports as an in-person instructor would do. Even if an instructor became aware of a need, they would not be able to make a meaningful referral given that the learner could live anywhere in the province.[CV] Fewer than one in ten e-Channel learners were connected to other services while in e-Channel, compared with about half of in-person learners.[LS] As blended learning is common, it is important to recognize that learners may receive referrals from in-person providers.

Referrals for blended learners are more meaningful, as these are made by their in-person providers.[CV] As one provider stated,

Referring is a very personal service. When done well, it requires very deep knowledge of the learner's goals, strengths and areas of opportunities, their mobility…their personality, goals,

---

[241] Hart, C. (2012). Factors associated with student persistence in an online program of study: A review of the literature. Journal of Interactive Online Learning 11(1):19-42; Kennedy, J. (2014). Characteristics of Massive Open Online Courses (MOOCs): A research review, 2009-2012. Journal of Interactive Online Learning 13(1).

prior experiences, their commitment level, and often personal details which factor into the referral (i.e. mental health issues, whether the individual offers parental or child support, criminal history, etc.). These are all things which every on-site program knows of each of their learners through their very personal, in-person relationships – and it's something inherently which online programs do not have the ability or luxury of [knowing].[CV]

> "For online programs… people **drop off if it's not engaging** and we want to avoid that at all costs."
>
> -e-Channel provider[CV]

Retention is more difficult. There is a widespread perception that retention rates are low in online learning.[242] This appears to be true in reality – typically only 7% of online learners generally complete online courses that they enroll in.[243] e-Channel providers acknowledge this challenge as well.[CV, 244] One stated,

We know that online retention rates are much lower than in-person so we try to avoid learners dropping off at all costs. Because we are not there live teaching, we need to cover every possibility and eventuality. We need to make sure content is clear…the plain language is there, it's visual, it's going to work properly. We can't just hope it works because we know as soon as you get frustrated with something you are going to leave. In general for online programs…people drop off if it's not engaging and we want to avoid that at all costs.[CV]
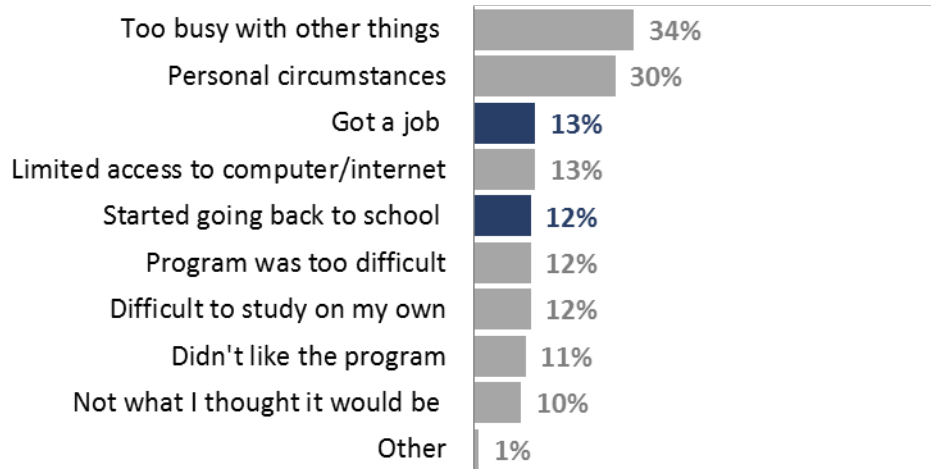
The most common reasons e-Channel learners left training before completing it had nothing to do with online learning per se. For example, 30% of learners said that they dropped out due to personal circumstances. That said, 12% of e-Channel learners indicated that they left e-Channel because it was difficult to study on their own, and 12% because the program was too difficult.[LS]

---

[242] Allen, IE and J. Seaman (2013). Changing course: Ten years of tracking online education in the United States. Babson Survey Research Group; Kennedy, J. (2014). Characteristics of Massive Open Online Courses (MOOCs): A research review, 2009-2012. Journal of Interactive Online Learning 13(1).

[243] Jordan, K. (2014). Initial trends in enrolment and completion of massive open online courses. The International Review of Research in Open and Distributed Learning 15(1).

[244] Findings from administrative data and learner survey on retention rates were conflicting and thus were not used in the case study.

Reasons e-Channel learners left training before completing it (n=125)[LS]

Reason	Percentage
Too busy with other things	34%
Personal circumstances	30%
Got a job	13%
Limited access to computer/internet	13%
Started going back to school	12%
Program was too difficult	12%
Difficult to study on my own	12%
Didn't like the program	11%
Not what I thought it would be	10%
Other	1%

The literature shows that retention in online programs can be strengthened by increasing direct communication with instructors.[245] e-Channel providers are employing this technique. One e-Channel provider gives ongoing feedback to learners over Skype, while another does so by email.[CV] Most (78%) of e-Channel learners reported that they received regular feedback on their training progress[LS] – this is only 10% less than in-person learners. Although this is impressively high, e-Channel learners may benefit from even greater contact with instructors. Of the e-Channel learners who felt that there were problems with their e-Channel experience, 35% said that it was because they needed in-person support.[LS]

> "[With the games] learners will come back **again and again** until they ace it."
> -e-Channel provider[CV]

"Gamification" is another promising engagement technique.[246] Deaf Learn Now has begun moving towards game-based learning, in which tests and quizzes are presented like video

---

[245] Hart, C. (2012). Factors associated with student persistence in an online program of study: A review of the literature. Journal of Interactive Online Learning 11(1):19-42.

[246] Hamari, J. et al. (2014). Does gamification work? A literature review of empirical studies on gamification. In 2014 47th Hawaii International Conference on System Sciences: 3025-3034.

games. Learners can compete against their peers and continuously retake tests to improve their scores.[CV] Deaf Learn Now staff indicated that this improves retention rates:

Before, it was just a quiz and if a learner passed, that was enough for them. Now with the games, the learners will come back again and again until they ace it.[CV]

Deaf Learn Now has also begun awarding digital badges to learners when they complete a course.[CV] A staff member reported:

We recently implemented badging on our system. It's a system of awarding learners for passing Milestones and courses and whatnot. Other e-Channel programs are really interested in it because it created engagement and gives something back to the learner.[CV]

Differences in accessibility

e-Channel is **more accessible** than in-person LBS for the following learners:

- Learners in **remote locations**.[SPS]

- Learners who **cannot come during regular hours** of operation.[SPS] One e-Channel provider reported that many of their learners are single mothers who work during the day and log on between 9:00 pm and 1:00 am.[CV] In discussion groups, e-Channel learners expressed appreciation of the **24/7 availability** of online training, making it easy to fit learning into their schedules and allowing them to learn at their own pace.[LDG] The literature confirms that this is a major advantage of online learning over in-person delivery.[247]

- Learners who are **not comfortable attending classes in-person**,[SPS] for instance because they are concerned that they will be stigmatized as "illiterate."

> One e-Channel provider reported that many of their learners are **single mothers** who **work during the day** and log on **between 9:00 pm and 1:00 am**.[CV]

e-Channel is, however, **less accessible** than in-person LBS for certain learners:

---

[247] Kauffman, H. (2015). A review of predictive factors of student success in and satisfaction with online learning. Research in Learning Technology 23.

Learners with lower levels of literacy or digital literacy. e-Channel providers, in-person providers, and learners themselves reported that e-Channel training is difficult for learners with lower levels of literacy or weak computer skills, especially since staff are not physically present with learners to help them access services.[CV, SPS, LS]

e-Channel providers often refer learners with low literacy levels to in-person providers who can better serve them. At least one e-Channel service provider has a relationship with an in-person LBS service provider whereby they refer learners who have low levels of literacy to the in-person service provider and when the learner is ready they are referred back to the e-Channel provider.[CV]

Meanwhile, 69% of in-person providers who do *not* refer learners to e-Channel said that this is because low literacy skills among learners are a barrier to online learning.[SPS] They felt that online courses were too short and fast-paced for learners with low literacy levels, especially those who do not have access to a computer at home.[SPS]

> "The learner's digital technology skills might be at **level 1**, but the platform is **level 3**."
> -e-Channel provider[CV]

Learners who lack self-direction skills. Learners who require more direct support or who lack self-direction skills encounter challenges in taking e-Channel courses. The largest difficulty that learners had with e-Channel training was the lack of in-person support and difficulty of studying on their own.[LS] A few in-person providers also indicated that low learner motivation was a reason that they do not refer learners to e-Channel,[SPS] and the literature indicates that learners need time management skills and self-motivation to succeed in online learning.[248]

In discussion groups, learners stated that it can be challenging to remain motivated and disciplined in online learning: "If you are scheduled to go to class, it forces you to go, but with online, it's all you." Learners did remark however, that e-Channel teachers are effective in motivating them and go out of their way to provide feedback and encouragement (e.g. by sending a personal email congratulating a learner on his or her mark).[LDG]

---

[248] Kauffman, H. (2015). A review of predictive factors of student success in and satisfaction with online learning. Research in Learning Technology 23; Hart, C., (2012). Factors associated with student persistence in an online program of study: A review of the literature. Journal of Interactive Online Learning 11(1):19-42; Lim, D.H. et al. (2014). Online vs. blended learning: Differences in instructional outcomes and learner satisfaction.

> "You aren't physically there to help them."
>
> -e-Channel provider[CV]

Lack of computer and internet access. Both e-Channel providers and e-Channel learners agreed that reliable computer and internet access are keys to a successful e-Channel experience. Of the e-Channel learners who said there were problems with e-Channel, almost one-quarter (23%) said it was because they had either a bad internet connection or a bad computer. 3% said they had no computer access.[LS]

e-Channel providers refer learners who lack reliable computer access to in-person LBS providers, as they feel they would be better served there.[CV] One e-Channel provider remarked that they do not have many learners on OW because people receiving social assistance cannot afford computer and internet access.[CV] In fact, only 4% of e-Channel learners were referred from OW or ODSP, compared to 11% for in-person learners.[AD]

In sum, e-Channel is more accessible than in-person LBS for some learners, and less accessible than in-person LBS for other learners. This is in line with the literature, which suggests that online learning is appropriate for some learners but not appropriate for others.[249]

> "[The Ministry] says they can just go to the library and use the computer there. They don't get that these are **women with three kids doing the course at 9:00pm**. And at the library you may just get one hour on the computer."
>
> -e-Channel provider[CV]

Differences in outcomes

Due to conflicting results from data sources,[AD, LS] it is not clear whether outcomes (in terms of employment, attending further education, goal path completion, and program completion) for e-Channel learners are better or worse than in-person learners. (The literature suggests that

---

[249] Kauffman, H. (2015). A review of predictive factors of student success in and satisfaction with online learning. Research in Learning Technology 23.

learning outcomes are roughly the same for in-person and online learning.[250]) The following information, however, sheds light on some of the benefits learners are gaining from e-Channel.

e-Channel learners improved their skills. Many e-Channel learners felt that their skills improved by participating in LBS, albeit a smaller proportion than in-person learners. Similar to in-person, some e-Channel learners felt they improved their reading, math, computer skills and said LBS training made it easier for them to do more education or training.[LDG, LS]

e-Channel learners improved self-management and confidence. Some e-Channel learners felt improvements in other areas of their lives, though this was not as high as for in-person learners. e-Channel learners reported increases in their confidence and their personal independence. About a quarter of e-Channel learners improved their ability to communicate with other people. A few e-Channel learners made new friends and became more involved in their community.[LDG,LS]

e-Channel learners feel prepared for their next steps. About three quarters of e-Channel learners felt that their training prepared them well for their next steps towards their goal.[LS]

e-Channel learners are satisfied: The majority of e-Channel learners were satisfied with the quality of their LBS training and would recommend the training to a family member or friend.[LDG, LS]

e-Channel learners did not complete Culminating tasks. Just three e-Channel learners completed a Culminating Task[AD, 251] while 7% of in-person learners completed at least one.[AD] This is because no Culminating Tasks have been integrated online to date.[CV]

Blended learning

The blended learning approach is popular among learners and service providers. Almost three-quarters (73%) of LBS service providers reported that they refer learners to e-Channel (with strong numbers across all sectors, streams, and regions), and the primary reason they make

---

[250] Cavanaugh, J. and S.J. Jacquemin 2015. A large sample comparison of grade based student learning outcomes in online vs. face-to-face courses. Online Learning Journal 19(2); Lim, D.H. et al. (2014). Online vs. blended learning: Differences in instructional outcomes and learner satisfaction; Kauffman, H. (2015). A review of predictive factors of student success in and satisfaction with online learning. Research in Learning Technology 23.

[251] Given that Culminating Tasks cannot currently be done online, it is not clear why any e-Channel learners at all have completed Culminating Tasks. The three e-Channel learners who completed a Culminating Task may be blended learners whose completion of a Culminating Task in an in-person program was incorrectly entered as an event in e-Channel.

these referrals is because learners prefer blended learning.[SPS] In the Deaf stream, almost all e-Channel learners are blended.[CV]

Providers report that blended learning offers the following benefits to learners:[CV, SPS]

- To provide a **wider variety of programming** and courses not offered in-person, such as courses suited to Deaf learners.

- To provide **flexibility and convenience** for learners in terms of time, location and progressing at their own pace.

- To supplement and reinforce in-person learning

- To offer an option for learners on a **waitlist** for in-person programming.

- To help learners to achieve their goals **faster**.

- To help learners improve their **digital skills**.

- To help increase learner **independence**.

Providers also mentioned a benefit to them, rather than their learners – namely that when learners choose to do some of their learning online, this **frees up staff time**.[SPS]

These findings are broadly in line with the literature. Although research on blended learning is not as extensive as literature on purely online learning, the literature that does exist is positive about the potential of this hybrid delivery mode.[252] For instance, a series of studies at the University of Central Florida found that, compared to purely in-person or online course offerings, blended courses had higher learner satisfaction and lower withdrawal rates.[253] While it is difficult to extend this finding to the very different world of adult literacy, it does indicate that blended learning is a promising avenue to pursue.

14.3 Conclusions

The findings outlined indicate that **e-Channel is a valuable service**. While learners' satisfaction and self-reported outcomes are not as strong as for in-person LBS services, they are still impressive considering that e-Channel is a much less intensive intervention, being accessed for

---

[252] Lim, D.H. et al. (2014). Online vs. blended learning: Differences in instructional outcomes and learner satisfaction; Moskal, P. et al. (2013). Blended learning: A dangerous idea? The Internet and Higher Education 18: 15-23; Picciano, A.G. et al. (2013). Blended learning: Research perspectives (Vol. 2). Routledge.

[253] Moskal, P. et al. (2013). Blended learning: A dangerous idea? The Internet and Higher Education 18: 15-23.

only about one quarter as many hours per learner. e-Channel also offers unique benefits, such as increased accessibility, flexibility and independence for some learners. For these reasons, **e-Channel should continue to be an integral part of** the LBS program.

e-Channel cannot, however, serve as a replacement for in-person services. One provider warned against the tendency to see online learning as a "panacea."[CV] Findings from this evaluation, as well as from the literature,[254] suggest that online learning is indeed not effective for all learners. Instead, **e-Channel is well suited to complement in-person LBS training,** through blended learning for some learners, and as a stand-alone option for others.

Appropriate referrals between e-Channel and in-person service providers will help to ensure that learners receive the type(s) of instruction that are effective for them. It will be important that service providers and other referring partners understand barriers and enablers to success in both in-person and online learning, so they can help learners decide which option is best for them.

e-Channel may be a good option for learners who:	In-person LBS services may be a good option for learners who:
- Have higher literacy levels (especially digital literacy); - Have reliable computer and internet access; - Are able to manage their own learning effectively; - Have busy schedules; - Are concerned about stigma; or - Would have difficulty travelling to an in-person program (due to e.g. distance, mobility issues, parenting responsibilities).	- Have lower literacy levels (especially digital literacy); - Have limited computer or internet access; - Need encouragement to persist in their learning; - Need intensive face-to-face instruction; - Need skilled and empathetic referrals to other services; or - Value the social aspect of in-person programming.

Blended LBS instruction may be a good option for learners who are not ready to learn independently, but who: a) would like greater variety or flexibility, b) want to develop digital literacy skills, and/or c) are just beginning to be ready for greater independence in their learning.

---

[254] Kauffman, H. (2015). A review of predictive factors of student success in and satisfaction with online learning. Research in Learning Technology 23.

In order to enhance retention rates, e-Channel providers could:

- Work to increase the quality and quantity of one-on-one interactions with learners

- Continue to develop game-based learning; and

- Keep abreast of other emerging best practices in the field.

15 Appendix C: Case study on the Deaf stream

15.1 Introduction

Purpose of the case study

This case study aims to identify the unique challenges, barriers, successes and opportunities of learners in the Literacy and Basic Skills (LBS) Deaf stream. The imperative to ensure that all eligible Ontarians can access LBS services is clear in Premier Wynne's 2014 mandate letter to the Ministry of Advanced Education and Skills Development (MAESD) Minister and in the 2015 budget speech. It is also mandated by the 2005 *Accessibility for Ontarians with Disabilities Act* (AODA) and in service providers' signed agreements with the Ministry. This case study contributes to understanding how to make the LBS program compliant with these directives and fulfill its promise of inclusivity.

This case study is based on data collected in the course of the evaluation (in particular consultation visits, stakeholder interviews, a service provider survey and administrative data) as well as additional interviews conducted with three Deaf stream service providers.

Deaf stream background

Deaf individuals are diverse, comprising the following sub-groups[CV, SPI, SPS, 255]:

- **Profoundly deaf** individuals are physically unable to hear. They may communicate with a sign language, with improvised "home signs" or may grow up with no language at all.

- **Culturally deaf** ("Deaf") individuals identify as part of a Deaf sociolinguistic community and use a sign language (such as American Sign Language [ASL] or Langue des Signes Québécoise [LSQ]) as their primary means of communication. They are often, but not

---

[255] "SPI,CV" has been used in the place of "SPI" or "CV" in order to maintain confidentiality.

always, physically deaf. Many regard Deafness as an identity and a culture rather than a disability.[256]

- **Hard of hearing** individuals have partial hearing loss, ranging from slight to near-total. They may use spoken language, speech-reading, sign language, or a combination. They may identify as part of the Deaf community, a distinct "hard of hearing" community, or neither.

- **Deafened** individuals were born with hearing, but became deaf or hard of hearing later in life. They usually do not identify as culturally deaf, and may use various communication strategies.

- **CI** individuals have had a cochlear implant (CI) surgically implanted, granting full or partial hearing. They may identify as Deaf, as "CI," as hard of hearing, or as hearing.

- **Deaf-Blind** individuals have both hearing and vision loss, often as a result of the genetic condition known as Usher syndrome. Deaf-Blind individuals may communicate using tactile (hand-over-hand) signing.

The Deaf stream of the LBS program is open to serving all of these individuals. For convenience, this case study will use the term "Deaf" (capitalized) to refer to all such individuals.

The LBS Deaf stream is the smallest of the four cultural streams. In 2014-15, it had 317 in-person learners, or slightly less than 1% of the total number of learners served in LBS.[AD] These individuals are served by 9 providers (6 community-based organizations, 2 colleges, and 1 school board) at 14 service delivery sites located in all four regions[AD]:

---

[256] Although learners in the Deaf stream are much more likely to identify as disabled than learners in other streams, more than half (69%) actually do not identify as disabled.[AD] This likely speaks to the movement to understand Deafness as a culture and identity rather than a disability.
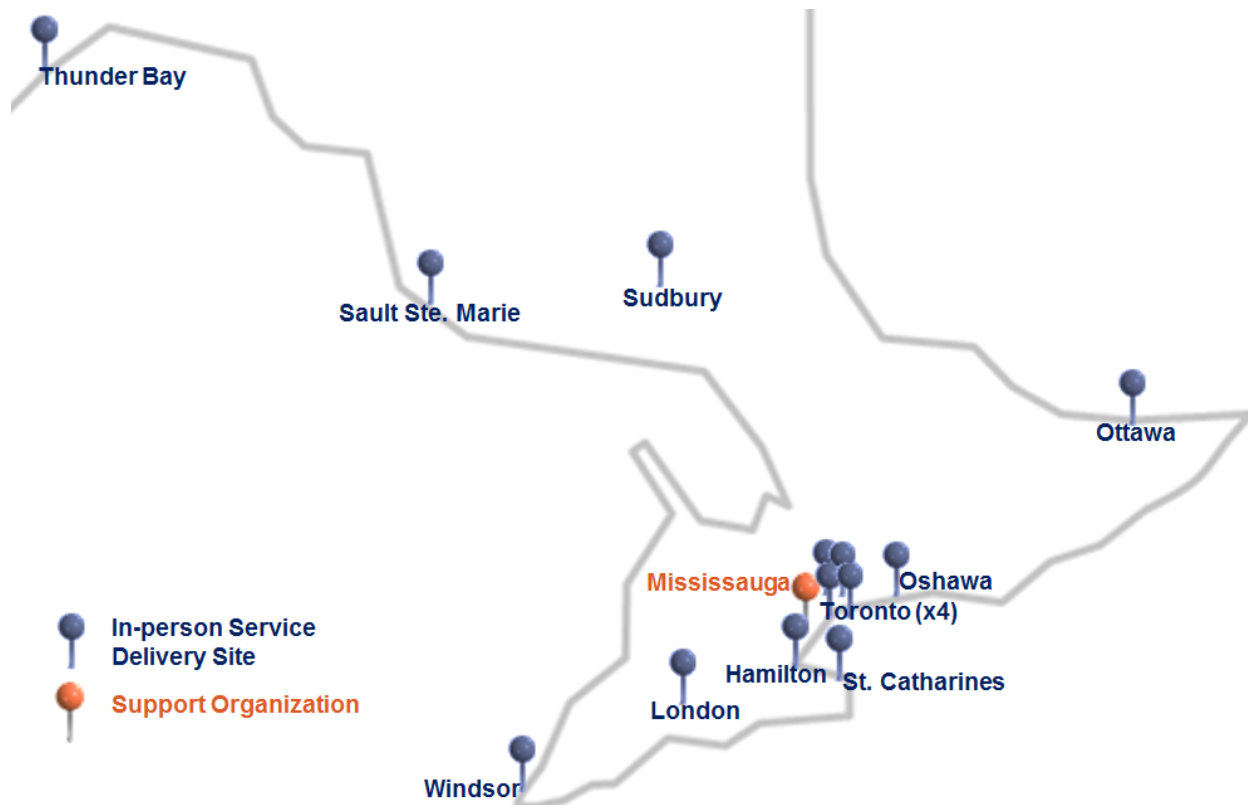
There is also one Deaf-stream e-Channel provider, **Deaf Learn Now**, which serves approximately 200 learners; all of these learners also attend in-person LBS.[CV] A small number of individuals who identify as Deaf or Deaf-Blind are served by providers in streams other than Deaf.[AD] The **Deaf Literacy Initiative** (DLI) is the Deaf stream's support organization.

15.2 Challenges and barriers

The Deaf stream encounters unique difficulties compared to other streams:

Approximate cost per…	Deaf	Abori-ginal	Franco-phone	Anglo-phone
learner served	**$6,100**	$2,200	$2,400	$1,900
hour	**$20.50**	$6.50	$10.50	$6.50

- **Higher costs**. Deaf stream service provision is by far the costliest per learner served[257] and per hour,[258] based on 2014-15 fiscal year figures[AD] (see chart, right).

- **Longer training.** Deaf stream learners stay in the LBS program for a median of one year – far longer than any other stream.[AD]

- **Slower learning**. Learners in the Deaf stream take more than twice as long as others to complete a plan item and almost three times as long to attain a competency. Deaf stream providers are the second least likely (after Aboriginal) to meet their Learner Progress standards: only 64% met the threshold in 2014-15.[AD]

- **Weaker results.** Learners in the Deaf stream are the least likely to attain at least one competency, pass at least one Milestone, or pass a particular Milestone given to them, and they are the second least likely (after Aboriginal) to complete all their goal path requirements.[AD] Deaf stream providers were also the least likely to say that their learners make meaningful improvements in their literacy and that they are prepared for their next step.[SPS]

- **Weaker outcomes**. Compared to other streams, learners in the Deaf stream who entered LBS unemployed were much less likely to secure employment as their next step; they were also much less likely to enroll in further education as their next step.[AD] Deaf stream providers were the second least likely (after Aboriginal) to say that their learners successfully transition to their next steps.[SPS]

- **Lower satisfaction**. While learners in the Deaf stream are fairly satisfied overall with LBS, they are significantly less satisfied than learners in other streams. 85% of learners in the Deaf stream would generally or strongly recommend the program, as opposed to 97-98% in other streams.[AD] In 2014-15, only 71% of Deaf-stream providers met the standard for Customer Satisfaction, by far the lowest of any stream.[AD]

Through interviews, consultation visits, and the service provider survey, it was possible to identify the reasons for these difficulties. All lines of inquiry strongly suggested that **difficulties in the Deaf stream are due to the unique challenges of working with Deaf learners, rather than to poor performance on the part of service providers**. The most significant of these challenges are the following.

---

[257] 2014-15 operating budget divided by actual number of learners in 2014-15, regardless of how many weeks they attended.

[258] 2014-15 operating budget divided by 2013-14 total hours of service. Hours of service were calculated using estimated time commitment and number of weeks attending in 2013-14. Missing values for time commitment were replaced with the site average. Hours of service may be underestimated (and cost per hour overestimated) if providers entered learners after they had been in the program for some time.

The Deaf stream serves learners who grew up without language

Some Deaf learners enter LBS without a strong first language (L1), neither a sign language nor a spoken language.[CV,SP] In 2010, the DLI reported that less than half of learners entered the program with native-level fluency in ASL: see the chart to the left, adapted from this report.[259]
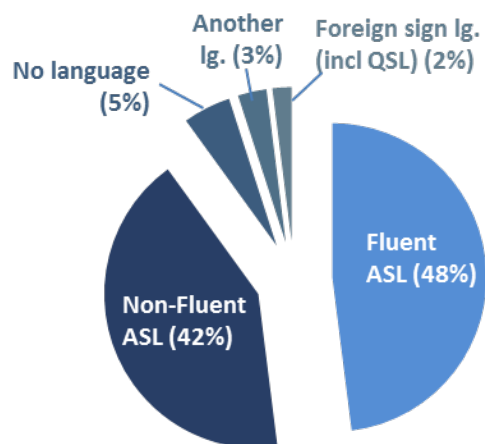
Lack of a strong L1 may happen for a number of reasons. The child may grow up in a small community or foreign country without a strong network of sign language speakers. Doctors may hope to "fix" a hard-of-hearing child by exposing him or her only to spoken language, only to find that the child is unable to learn spoken language. The child's parents may be (indeed, usually are) hearing and may not learn sign language. In the words of one provider, "for parents, it's like having a foreign exchange student in your house." As a result, some Deaf children "are just left in their own little world," without any language at all.[CV, SPI]

> "Some Deaf children are just left in their **own little world**."
>
> -Service provider[CV,SPI]

Providers point out that a lack of strong L1 makes *all* learning more challenging going forward, and means that significant time and effort must be expended in teaching ASL before the learner can acquire literacy per se. One provider stated, "The Anglophone streams just come in to upgrade, while our students come in with no language." [CV, SPI]

---

[259] Deaf Literacy Initiative. (2010). Ontario Adult Literacy Curriculum ASL Feasibility Study Report.

The Deaf stream is the only stream that teaches ESL

In any other stream, a learner without proficiency in English or French should be referred elsewhere (e.g. to the Language Instructor for Newcomers to Canada [LINC] program if the learner is a newcomer). In the Deaf stream, such learners are eligible for LBS, and indeed are numerous[CV, SPI]: in the discussion group with Deaf learners, the main reason why learners had entered the program was to improve their English. One learner said,

For me the goal [is] to improve my English skills, because I want to be an airplane mechanic, which requires English as well as math skills. I'll need to read the manuals and communicate with hearing people by email, so I need English reading comprehension and writing for that.[LDG]

This poses a special challenge for Deaf stream service providers. Not only must they expend resources on teaching ESL, they are also teaching it to individuals who cannot hear it and thus find it much more difficult to learn than a hearing person would.[CV, SPI] Lack of a strong L1 and lack of English were identified in a report by the DLI as two of the most common reasons why learners "linger" in the Deaf LBS program.[260] There are also challenges in recruiting staff members who are fully fluent in both English and ASL.[261]

> "This program is about developing **literacy**, but also **language**. And not just one language but two: ASL and English."
>
> -Service provider[CV,SPI]

Summing up the linguistic uniqueness of the Deaf stream, one provider said, "This program is about developing literacy, but also *language*. And not just one language but two: ASL and English." [CV, SPI]

---

[260] Deaf Literacy Initiative. (2010). Ontario Adult Literacy Curriculum ASL Feasibility Study Report.

[261] Deaf Literacy Initiative (2010). LBS Capacity Assessment Report.

Deaf learners face barriers to education and employment

On paper, learners in the Deaf stream enter LBS with more education than learners in other streams.[AD, 262] According to providers, however, this is not an accurate reflection of the literacy levels that their learners come in with. Providers point out that, now that many provincial Deaf schools in Ontario have closed, Deaf children are often "mainstreamed" into classrooms with hearing children, which can cause problems. The interpreter assigned to the child may or may not be properly trained, and thus the Deaf child receives an imperfect interpretation of what the teacher is saying.[CV, SPI] In addition, Deaf children cannot simultaneously write notes and watch what the teacher is signing – a problem which continues to slow learning when they are adults in an LBS program.[CV, SPI]

> A Deaf learner cannot simultaneously **write notes** and watch their instructor sign.

For these and other reasons, Deaf stream providers state that **even learners with a grade 12 education may enter LBS lacking basic literacy and numeracy skills**.[CV, SPI] One provider stated that many Deaf individuals "get lost in the system" and graduate high school with only a grade 4 or 5 level of functional literacy.[CV, SPI]

Post-LBS, learners encounter further difficulties which weaken their outcomes. For learners with a Postsecondary goal path, there are just two ASL-only universities in the world,[263] and none in Canada. Learners with an Employment goal path may seek opportunities in the clerical, service, and industrial fields, but face discrimination in hiring despite the implementation of the AODA.[CV, SPI, 264] Providers told these stories:

We need people to give [Deaf people] a chance. There is a person who wanted to get into apprenticeship as a painter. So our counsellor spoke to the training union for painting but he refused to work with the learner. He cited safety issues et cetera and said the learner will never be hired by an employer and it's not his job to pay for an interpreter.[CV, SPI]

---

[262] They are much more likely to have completed high school, more likely to have completed education or training in the last six years, and far less likely to have a history of interrupted education.[AD]

[263] Gallaudet University in Washington, DC and the National Technical Institute for the Deaf in Rochester, NY.

[264] Stephenson, S. (2003). Workforce Literacy and the Deaf Stream Literacy Classroom.

> "He said the learner will **never be hired** by an employer and it's **not his job** to pay for an interpreter."
>
> -Service provider[CV,SPI]

They are just pushed along the system, and when they graduate, they don't have the literacy skills, and then when they try to get employment, they don't have the literacy skills to back them up…[People] perceive them as incapable, no IQ….Some have requested interpreters but they aren't always available….They might have to go for the interview without the interpreter and then they write back and forth and then it seems like they aren't qualified. Or…[the employer] finds out that with Deaf rights, an interpreter must be present at all meetings, which can get very expensive, so the employer…doesn't want that. It's so much easier to hire a hearing person. The system is broken, and you wonder why they don't have goals and hope. It's because they have been let down time and time again.[CV, SPI]

One provider also stated that Employment Ontario (EO) programs other than LBS are not always accommodating to Deaf clients and that she must sometimes refer ES staff to the AODA to ensure accessibility.[CV, SPI]

The OALCF is not yet fully Deaf-friendly

Since learning in the OALCF is geared towards the individual goals of learners, it is meant to work for learners in any stream and with a variety of interests, levels, and ambitions. Unfortunately, the transition to the OALCF is not complete in the Deaf stream.

Deaf stream providers are the **least likely to report that they have the capacity to deliver LBS services in alignment with the OALCF**.[SPS] They were also the least likely to have received training related to the OALCF in the previous year.[SPS] One provider said,

There's not often much capacity to make things compatible for Deaf people. Essential Skills was developed and piloted for Anglophones. We found that the Deaf stream is often the last people consulted. That pretty much applies to everything – they develop for the Anglophone stream first and then try to fit it into the other streams. They need to change their way of thinking to be inclusive of everyone.[CV, SPI]

> "They develop for the **Anglophone stream first** and then try to fit it into the other streams."
>
> -Service provider[CV,SPI]

In particular, **Deaf stream providers struggle with Milestones**. Deaf stream providers are far more negative about Milestones than other streams: they overwhelmingly report that Milestones are difficult to administer, irrelevant to learners, not appropriate for teaching adult learners, and not diverse enough in terms of task group and level.[SPS] Deaf learners are the least likely to have passed at least one Milestone, and the least likely to pass a Milestone that they attempted.[AD]

These concerns were echoed in interviews and consultation visits. Milestones were often described as **too difficult for Deaf learners given the level of English required**.[CV, SPI] Some providers also felt that they are not culturally appropriate to Deaf learners' experiences and interests and are therefore, in the words of one provider, "contradictory to customized learning."[CV, SPI, 265]

Providers reported that these Milestone-related difficulties cause anxiety in both them and their learners.[CV, SPI] Learners in the Deaf stream are given the most Milestones and fail them the most often[AD], creating the potential for embarrassment and frustration. One provider told this story:

We lost a learner this year. She knew about administering the Milestone partway through the year. She got really nervous. She didn't want to take it, and she left the program. It caused so much anxiety in her. We were sad to see her go, and she told us she left because of it, she felt it was too challenging, it embarrassed her, she was embarrassed that she would not pass it. So she exited the program.[CV, SPI]

One Deaf stream provider worried about Milestones because "we are challenged by the Ministry to get people in and out as quickly as possible, so they can work and get taxed."[CV, SPI] Another provider said,

I worry every year if [learners] will pass the Milestone. I run out of Milestones that they will be able to attain, and then what happens? Keeping students out of a program because I know they won't be successful? There are only two of us, and I'm trying to teach [several dozen] different

---

[265] Similar concerns were voiced in Deloitte's 2011 LBS evaluation and in Mazzulla and Geraci's 2013 Milestones Review Project.

learners at all different levels and there is no curriculum to give them. MTCU needs to hire somebody to be able to develop curriculum specifically for Deaf stream.[CV, SPI]

There is evidence that **this anxiety around Milestone completion has led to gaming behaviours**. Fully 56% of learners in the Deaf stream are assigned Milestone 54 ("Log into a user account"), a higher rate of assigning this "easy" Milestone than any other stream.[AD] Providers admit to activities that may be considered "teaching to the test," for instance by teaching students the specific English vocabulary they will need in order to pass a particular Milestone, or by giving "pre-req Milestones" that are essentially practice versions of Milestones.[CV, SPI]

In addition, **Culminating Tasks are currently unworkable for the Deaf stream**. Just 1% of Deaf stream learners have completed a Culminating Task, far less than any other stream.[AD] Deaf stream providers are overwhelmingly negative in their assessment of Culminating Tasks: on the service provider survey, no Deaf stream provider agreed that Culminating Tasks help to assess if a learner is ready for the next step, and just one said that there are enough Culminating Tasks to choose from.[SPS]

In interviews and consultation visits, Deaf stream providers explained that this is because Culminating Tasks require a high level of English as well as multiple other skills, and as a result, are **too difficult for the vast majority of Deaf learners**. One provider reported, "We tried to administer [one] once with a higher level learner and we were not successful, so now we don't bother trying. They won't be successful." Another bluntly said, "Forget it, we'll never meet a Culminating Task for the Deaf stream." This provider added that, "This is a big issue since this affects how we're perceived in terms of performance."[CV, SPI]

Likely as a result of these difficulties, Deaf stream providers are considerably **more negative than other streams about the Effectiveness measures** in the Service Quality Standards (SQS).[SPS] In particular, they were concerned about the Learner Progress and Completion of Goal Path measures, and strongly favoured reducing the weighting of the Effectiveness measures.[SPS] A redesigned Suitability measure which is weighted heavily enough to counterbalance the Effectiveness measures, and that takes into account the fact that Deafness poses a larger barrier to learning than many of the other Suitability indicators, would provide the appropriate recognition to providers who work with this harder-to-serve population.

15.3 Successes and opportunities

The challenges and barriers discussed above go a long way to explain the weaker cost-effectiveness, results, outcomes, and satisfaction found in the Deaf stream. In the course of interviews and consultation visits, a number of successes, opportunities, and emerging best practices were identified that may help to mitigate these difficulties.

Deaf learners make gains in independence

Learners in the Deaf stream are far more likely than learners in other streams to be seeking independence,[AD,266] and of the five goal path descriptions, Deaf stream providers were the most positive about the accuracy and completeness of the Independence goal path description.[SPS] Interviews and consultation visits showed that independence is an important goal at Deaf stream sites.[CV, SPI]

Providers emphasized that for Deaf learners, **learning to read and write in English is the major gateway to independence**.[CV, SPI] They pointed out that by increasing their English skills, their learners have learned to:[CV, SPI]

- Make budgets
- Consult nutritional labels on food
- Understand warnings on medicine bottles
- Shop for groceries and follow recipes
- Apply for citizenship
- Read legal documents
- Use a cell phone or tablet
- Avoid email scams

Providers encourage independence for students regardless of goal path. For instance, one provider encourages the learner to come to the intake process alone rather than with his or her parents (since the learner may be just out of high school, the parents often wish to accompany the learner).[CV, SPI] Compared to other streams, learners in the Deaf stream were far more likely to achieve independence as their next step after LBS training.[AD] In the discussion group, a learner with a Postsecondary goal path reported, "This program has taught me how to be responsible and independent, and look inwards to see what I need to improve."[LDG]

Deaf stream providers work closely with the Deaf community

Since all Deaf providers are located in urban areas (e.g. Ottawa) or regional hubs (e.g. Sault Ste. Marie), each has a sizeable local community of Deaf people. Providers spoke of holding community forums and reaching out to local ASL-speaking clubs, provincial Deaf schools, and local school boards that serve mainstreamed Deaf students.[CV, SPI] Deaf stream providers were

---

[266] 48% of Deaf stream learners are in the Independence goal path, as opposed to just 10% in the Anglophone stream, 20% in the Francophone stream and 23% in the Native stream.[AD]

the most likely of all the streams to rely on their regional network's LSP to help identify community needs.[SPS]

Providers did complain, however, that Deaf individuals with low levels of English literacy can still be difficult to reach since they cannot read print-based ads or hear radio-based ads, and because there is a lack of robust census data on Deaf populations and their needs.[CV, SPI]

Stakeholders are developing Deaf-friendly learning materials

In recent years, the DLI, the Ministry, individual Deaf stream providers, and others have developed learning materials and approaches geared specifically to Deaf learners and Deaf practitioners. These include:

- **Online training for Deaf practitioners** created by the DLI including ASL videos on goal paths, goal setting, task-based learning, learning disabilities, assessment, and many other topics as they relate to Deaf learners.

- **Bridging to Deaf Success**, a Deaf-stream adaptation of the Anglophone stream's Signposts resource, which helps practitioners to assess learners' literacy levels in different skill areas.

- **Deaf Literacy Skills for the Workforce** and **Deaf Literacy Skills for the Workplace**, created by DLI, including both practitioners' guides and learners' workbooks.

- **Deaf CAN! Workforce Literacy Resource**, created by Durham Deaf Services, which identifies the most popular entry-level jobs for Deaf people and the specific literacy skills needed for them.

- **Manipulative Visual Language** training. One provider spoke enthusiastically of this novel way of teaching English to Deaf people or other visual learners through tactile manipulation of shapes.

- **Read Forward**, an IALS-aligned reading assessment created by Bow Valley College in Calgary. One provider praised this resource, saying that it is well-liked by Deaf learners, visually oriented, and allows learners to take tests multiple times and show incremental improvements.

- **Deaf CAMERA**, DLI's adaptation of the CAMERA (Communications and Math Employment Readiness Assessment) tool.

- **Physical design of classrooms**. Providers put many whiteboards on the walls so that multiple learners can see and use them at once; arrange desks in a semi-circle so that each learner can see all other learners signing; make sure sight lines are unobstructed; and ensure bright lighting to help learners with visual impairment due to Usher syndrome or other conditions.[CV, SPI]

- **Guest speakers**. One provider brought in a Deaf entrepreneur from another province who founded and runs his own construction company. He performed a hands-on

demonstration of construction materials and explained his business to learners in ASL.[CV, SPI]

- The Ministry's **Supplemental Tasks for Practitioners** document (2011) provides OALCF-aligned tasks designed to suitable for Deaf culture. For instance:

    - "Use a pen and paper and gestures, along with the menu, to order a meal at a restaurant."

    - "Write a letter to a disability counselor at a postsecondary institution to request accommodations."

    - "Survey Deaf/Deaf-Blind community members to determine the range of attitudes about an issue of concern in the community, such as Cochlear Implants, and compile and display the data."

Deaf learners make good use of distance learning options

e-Channel is more popular among Deaf stream learners than among learners in any other stream. Approximately two-thirds of Deaf stream learners are signed up for **Deaf Learn Now**,[AD, CV] the Deaf stream e-Channel provider. Although it was not possible to assess Customer Satisfaction scores,[267] staff at Deaf Learn Now reported receiving "lots of positive feedback, and most of the negative feedback is that [the learners] want more."[CV]

The Deaf stream also has a **high proportion of blended learners**. In the service provider survey, 100% of Deaf stream providers reported that they have blended learners, and their most commonly cited reason for referring learners to e-Channel programs was because learners *prefer* blended learning.[SPS] Deaf Learn Now staff report that nearly all of their learners are blended; some of them, for instance, are enrolled at George Brown College's Deaf in-person LBS program located just down the hall in the same building.[CV] Deaf learners therefore appear to be using e-Channel mainly as a complement to in-person delivery, rather than a replacement.

Why is distance learning so popular among Deaf learners? Several possible reasons emerged in the course of the evaluation:

- **Online content is visual in nature** and thus is geared to Deaf people's typical learning style.[CV, SPI, 268]

---

[267] A total of three learners at Deaf Learn Now provided customer satisfaction ratings at exit.[AD] This may reflect the long enrollment periods of Deaf stream learners.

[268] Burgstahler, S. (2002). Distance learning: Universal design, universal access. Educational Technology Review 10(1): 32-61.

- The Deaf community more generally has **embraced online technology**.[269]

- Deaf Learn Now offers a number of features that make it **engaging for learners**, such as "gamifying" content, offering badges for completion of online courses, and video-chatting one-on-one in ASL with learners who need more individualized assistance.[CV]

- Deaf Learn Now is operated by George Brown College, which has **close relationships with in-person Deaf stream providers** (including one co-located in the same building). This facilitates cross-referrals.[CV, 270]

Deaf stream e-Channel also encounters **special challenges**. Deaf stream providers do not refer some Deaf learners to e-Channel because of accessibility issues[SPS]; distance learning is less accessible to learners with low levels of literacy or of English, which includes many Deaf learners.[CV, SPI] The visual nature of online learning is also unsuitable for Deaf learners with visual impairment. Some stakeholders felt that there was not enough online content for Deaf learners[SPS,CV, SPI], and one provider[CV, SPI] and a DLI report[271] point out that developing online content for Deaf learners is expensive because it must be presented in both English and ASL.

15.4 Conclusions

The Deaf stream is **an outlier in the LBS program**: not merely a literacy program, it is a *language* program for learners who wish to acquire one or even two non-native languages (English and ASL), without which transitioning to independence, employment, or further education is difficult or impossible. Stated differently, the Deaf stream is a unique stream because the Deaf community is a unique community – occupying a position that is in some ways similar to newcomers (who must become familiar with a new language and culture), in other ways similar to first-generation Canadians (who grow up with a different language and

---

[269] Deaf Literacy Initiative. (2010). [LBS Capacity Assessment Report](#).

[270] Another possible reason for the popularity of e-Channel among Deaf learners is that **it can reach learners living anywhere**. This may be especially important in the Deaf stream because it has the fewest service providers of any stream, and none at all in rural or remote areas of Ontario. Some learners commute long distances or even move to a different part of the province in order to access in-person LBS services.[I,CV] The DLI has suggested adding services in Barrie, Belleville, Kitchener-Waterloo, and Milton. However, the high proportion of blended learners in the Deaf stream indicates that few Deaf learners are accessing e-Channel as an *alternative* to in-person service provision. For this reason, **the geographical accessibility of e-Channel may not be a strong reason for the popularity of this service among Deaf learners.**

[271] Deaf Literacy Initiative. (2014). [Background on the Deaf e-Channel](#).

culture than their parents), and in other ways different from either (for instance, Deaf individuals sometimes grow up with no language at all).

Given the stream's unique characteristics, and its double mandate to boost both language and literacy, it is not surprising that costs are higher and results less strong than in other streams. **The Deaf stream should be celebrated for its successes** under challenging circumstances rather than seen as less effective than other streams.

The Ministry can recognize and accommodate the uniqueness of the Deaf stream by:

- supporting the ongoing **adaptation of OALCF components** (e.g. task-based activities) to suit Deaf learners;

- ensuring that Milestones and Culminating Tasks are made more Deaf-friendly;

- **altering the SQS formula for the Deaf stream** to decrease the weight of Effectiveness measures, and/or implementing more achievable standards for Learner Progress and Completion of Goal Path; and

- continuing to **support the e-Channel provider Deaf Learn Now** as an integral part of LBS's Deaf stream.

Despite the Deaf stream's uniqueness, its challenges bear similarities to those faced by any LBS service provider that serves sociolinguistic minorities (e.g. Francophone newcomers from West Africa), learners with multiple barriers (e.g. individuals with developmental disabilities), or non-native English/French speakers (e.g. Aboriginal learners who grew up speaking an Aboriginal language rather than English or French). Service providers who serve these demographics often face similar difficulties to the Deaf stream: challenges in making learning materials culturally appropriate, incremental progress that is poorly captured by Milestones and Culminating Tasks, the need for more intensive interventions that are more expensive and take longer, and discrimination against learners in their next steps.

This case study, in particular the successes and opportunities that were noted, should serve to **encourage accessibility for all eligible LBS learners**, not just those who identify as Deaf.