Enhancing Transitions - Client Perspectives Project

**Final Report**

**Simcoe/Muskoka Literacy Network**

**April 2015**

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Our Partner, Metro Toronto Movement for Literacy (MTML)

The focus group host sites for marketing to and hosting client groups

La Clé d’la Baie en Huronie– Penetanguishene

Alpha Toronto

District School Board of Niagara – Niagara Adult Literacy for the Deaf Program

Canadian Hearing Society

George Brown College - Academic Upgrading Program for Deaf and Hard of Hearing Adults

Centennial College

YMCA Employment Services – Huntsville

Barrie Career Centre

Frontier College - Toronto

The project Advisory Committee:

Ghazal Niknazar and Alicia Homer (Metro Toronto Movement for Literacy)

Susan Lefebvre (Toronto District School Board)

Kathy Low (Northern Lights Employment Services)

Nancy West (YMCA of Simcoe/Muskoka)

Debra Flynn, QUILL Learning Network, for help with webinars.

We also greatly appreciate the discussion and ideas from clients/learners and service providers in Simcoe County, Muskoka, Toronto and Niagara, and “town hall” and webinar participants throughout the project.

# Background

In 2013-14, Simcoe/Muskoka Literacy Network (SMLN) completed a project called “Formalizing Transitions Between Employment Services and LBS”. This project worked with service providers to identify

* transition points for moving clients/learners between employment services and literacy/essential skills upgrading services
* best practices for supporting these referrals and transitions
* tools, forms and strategies to support the transitions of clients/learners

The information was compiled into the “Guide to Current and Emerging Practices in Transitions”.

In 2014-15 the Simcoe/Muskoka Literacy Network was funded for a project called “Enhancing Transitions – Client Perspectives”. This project was a partnership of SMLN and the Metro Toronto Movement for Literacy (MTML). The project sought to consult with clients and learners who have experienced referrals and transition between the two services, to gain these perspectives.

For the purpose of this report and project, the terms “client” and “learner” are used interchangeably.

# Project Goals

The main goals of the project were

* consult with learners and clients of Employment Ontario (EO) services to gain their perspectives on what works best for them when referred and/or transitioned to another service provider
* compare these perspectives with those of service providers collected during the 2013-14 project
* revise the “Guide to Current and Emerging Practices in Transitions”
* share the research findings and best practices with the EO network and with other community organizations accessed by EO clients/learners

# Proposed tasks

The proposed tasks of the project were to

* conduct eight focus groups (one in French) with LBS upgrading learners and employment services clients
* compare the findings from the focus groups with the ideal conditions and best practices identified by service providers in 2013-14
* survey Regional Networks and support organizations as to their agreement with the results of this comparison and how to support local agencies to apply these best practices
* present findings and comparison to EO service providers (and other stakeholders) in a “town hall” session
* revise the Guide to Current and Emerging Practices in Transitions as per client perspectives and town hall discussions
* professional development via webinar delivered at least once
* ongoing communication with project manager and team
* write project report

# Focus Groups

Simcoe/Muskoka Literacy Network and Metro Toronto Movement for Literacy (MTML) organized nine focus groups with clients to gather information about their experience with Employment Ontario programs and the transitions between EO services.

##

## Selection of focus groups

In September 2014, we developed the criteria for the selection of focus group sites and established a process to reimburse focus group participants (clients/learners) for travel or dependent care expenses. A “Frequently Asked Questions” (FAQ) fact sheet was created to enhance communications with potential host sites. The FAQ sheet can be found in Appendix 1.

SMLN and MTML distributed a “Call for focus group sites” to Employment Ontario (EO) agencies in their catchment areas and attached the FAQ. A total of 14 agencies indicated that they were interested in hosting focus groups. The project advisory committee help select the final focus group sites. Because of strong response from the Francophone and Deaf communities, we decided to add an additional focus group for each cultural group, increasing the number of focus groups to nine: two Francophone, three Deaf and four Anglophone. The focus group host sites were

* La Clé d’la Baie en Huronie– Penetanguishene
* Alpha Toronto
* District School Board of Niagara – Niagara Adult Literacy for the Deaf Program
* Canadian Hearing Society
* George Brown College - Academic Upgrading Program for Deaf and Hard of Hearing Adults
* Centennial College
* YMCA Employment Services – Huntsville
* Barrie Career Centre
* Frontier College - Toronto

Over the month of October 2014, the project staff and advisory committee developed questions for the focus groups. The Project Co-ordinator contacted the sites to clarify their role and helps arrange for American Sign Language (ASL) interpreters, and to set a schedule for the groups. She also contracted a Francophone facilitator to conduct the Francophone focus groups.

Facilitating the focus groups

Each focus group lasted at least 90 minutes and used the same questions:

1. What job would you like to have at the end of your upgrading/training?
2. How did you find this program? What other programs are you currently using?
3. How did you find the referral process?
4. What could programs do to make the referral process better for clients? What could we do better?
5. What does literacy services do for you? How do they help you reach your goal? What does employment services do for you? How do they help you reach your goal?
6. How does this program work with other programs to support your goals? Some suggestions to help build conversation included
* offers services in the same location
* shares intake appointment information so I don’t have to complete the information again
* discusses the activities I need to complete and come up with one combined action plan
* other?
1. Do literacy and employment services work together to help you? What other community services have helped you?
2. Have you ever been referred from one service to another before? What worked well? What didn’t?
3. Other comments?

At most focus groups there were two project staff present – one to facilitate the conversation and one to take notes. Focus group size ranged from 4 – 16 people. A total of 80 clients/learners participated across the nine focus group sites.

|  |  |
| --- | --- |
| Host Site/Stream | Participants |
| Alpha Toronto (Francophone)  | 14 |
| La Clé d’la Baie en Huronie, Penetanguishene (Francophone)  | 9 |
| District School Board of Niagara (Deaf)  | 6 |
| Canadian Hearing Society (Deaf)  | 6 |
| George Brown College (Deaf)  | 7 |
| Centennial College (Anglophone)  | 12 |
| YMCA – Huntsville (Anglophone)  | 4 |
| Barrie Career Centre (Anglophone)  | 15 |
| Frontier College (Anglophone)  | 7 |

Refreshments and gift cards were provided at each focus group.

Focus group findings

An overview of the focus group findings can be found in the chart below.

**What matters to clients?**

|  |  |
| --- | --- |
| **Partnerships*** facilitated referrals
* knowledge of other community agencies beyond EO
* directory of services
* itinerant offices
* guest speakers
* tours
 | **Customer service – Environment*** safe, welcoming, relaxed, comfortable
* professional, respectful, personable
* recognize family/emotional issues
* “Treats us like adults - training wheels are off”
* “Casual, comfortable, compassionate”
* single point of contact, timely
 |
| **Customer service – Accommodations*** flexible times/days
* accessibility (more than physical)
* equipment and technology to support learning needs/styles
* appropriate communication preferences (e.g. text/email rather than phone)
* knowledge of accommodations needed and resources available
* policy/protocol for providing accommodations
 | **Customer service – Service delivery*** customized to each client
* client-centered approach (one-on-one, even in classroom)
* self-paced
* focus on client self-awareness – strengths and challenges
* goal-directed
* meaningful for life and work
* show progress, give certificate
 |
| **Co-location*** beyond Employment Ontario – health, food, childcare, etc.
* simplify referrals
* next steps identified and accessed without travel/time
* common intake/assessment process
* efficient and effective – seamless for clients
 | **Labour market information*** data on local jobs and who is hiring
* knowledge of emerging and declining industries
* information on wage expectations
* understanding of training and credentials needed
* offer LMI from other communities/provinces
 |

More detailed findings and analysis can be found in Appendix 2.

Town Hall

Simcoe/Muskoka Literacy Network held a “Town Hall” meeting on February 5, 2015 to share the findings to date with Employment Ontario agencies and other community services. The agenda included a project overview and update, and a conversation café to gather new information and a discussion of next steps.

Twenty-five participants attended the Town Hall. The town hall session validated the findings as outlined in the previous chart. They also offered their views on barriers and solutions to implementing some of the emerging practices identified by focus groups.

In terms of **partnerships**, they felt that best practices included common forms for facilitated referrals, staff training and understanding other service programs. Barriers included only offer group programming in some locations and not enough space to co-locate.

In terms of **customer service - environment**, they felt managing expectations was the most difficult priority to meet. They have difficulty identifying jobs in demand and how to use labour market information.

In terms of **customer service - accommodations**, they felt changes that could be made to have a policy/protocol in place for required accommodations, to include diversity as a standing item at team meetings and to have LBS as a resource completed in tandem with EO programs (rather than sequentially). Resources that are required to make the changes may include a survey to ask for suggestions, accessible customer service training and a printed guide at the desk. The biggest challenge to making these changes is funding.

In terms of **customer service – service delivery**, best practices included certificates for participation. Barriers included the belief that it is hard to customize for each person in a classroom, that there isn’t enough French-speaking staff at other agencies and lack of time. Changes that could be made include

* more online individualized computerized training
* at least one French speaking person at each organization
* a common referral method
* staff with a better knowledge of community partners.

Resources required to make changes include online preparation courses for GED and a directory of referral services – knowing who to refer to and how to refer.

In terms of co-location, best practices include identifying client responsibility in the process. Barriers include

* lack of space
* lack of an accessible location
* willingness of all parties / matching values
* size of community (bigger may require more sites/services)
* legal implications
* fear of losing your program – “getting sucked in”.

Resources required to make changes include government funding or resources to offer “specialists” (re: physical disabilities, hearing, language, cognitive disabilities).

In terms of labour market information, best practices include staff having a better understanding of how to use labour market information with clients. Barriers include the fact that it’s not an exact science/method to utilize this information with clients. Changes that could be made include having a job central career coach and talking to employers about workforce development.

Resources required to make changes include wage expectations for working in Canada.

Notes from the Town Hall can be found in Appendix 3.

Comparison of results from phase 1 and 2

This phase of the project has focused on what clients experience through their own words, where the first phase focused on what agency staff observed about the client experience. While there are differences in perspective, the way client experiences are articulated by clients and programs show very similar understandings of what clients go through in the Employment Ontario system. All can agree that the most important aspect of client success is finding and creating an environment where people can thrive.

Although there were slight differences in wording used between both phases, the overall ideas were easily split into three categories:

1. a safe, welcoming, respectful environment where a client can thrive
2. personalized, practical, flexible, goal-directed programming
3. concrete plans, realistic goals and information/access to next steps

Clients identified a number of features to enhance transition that staff did not. Clients identified

* a single point of contact at the new agency to handle calls and on-going communications – Clients stated that having to deal with multiple program staff and re-explain information was difficult and that by having a single contact, information was shared more effectively.
* timely communications – in addition to having a single point of contact at the new agency, many focus group participants identified timely communications as important. Participants stated that their calls were not always returned in a timely manner and they felt frustrated in their plans to move forward.
* clients value learning AND life impacts and effects – Clients stated that learning was more valuable and was better retained when agencies helped them develop skills and acquire information benefitting them in their personal, family and community lives.
* accommodations such as schedule, technology, policies and communication are important – Clients emphasized the value of a truly “client-centred” approach relevant to the needs of each unique client. They identified practical supports such as adaptive technologies and equipment, respecting language and communications preferences, flexible approaches based on learning styles and schedules and the importance of agency policies and protocols to ensure these accommodations were available on a consistent basis. Participants in the Deaf and Francophone focus groups identified accommodations more often than participants in Anglophone groups.
* explicit suggestions for inclusion of wrap-around services : focus on “what” is needed – While agency staff identified strategies for referring clients to wrap-around services, clients were very specific about what was needed, suggesting multi-service centres (service providers in one location), hosting speakers from other services, and organizing group tours.
* common intake procedure – A number of focus groups suggested a common intake process to make their experiences more effective and efficient.

Agency staff identified a number of features to enhance transition that clients did not. Staff identified

* client readiness: attitudes, motivation, commitment – Staff stated that these individual attributes were key factors in a successful transition.
* concrete skill acquisition – Staff identified that they were able to recommend a transition to a client and confidently make a referral when a concrete set of skills were in place, and could be observed, that would be necessary for the “next step”.
* focus on “how” transition is facilitated and tools to aid transition – While clients were very specific in identifying activities to ease transition, agency staff described strategies such as using directories, networking and sharing information across organizations (primarily staff-directed activities).

Simcoe/Muskoka Literacy Network mapped out the key findings from both Phase 1 and 2 in the comparison chart in Appendix 4.

# Network validation

We asked the 16 regional literacy networks across Ontario to help validate the project findings in February/March 2015. We asked them to discuss the findings at literacy service planning tables and report back to the Independent Evaluator through a digital survey.

What follows highlights the local discussion of one Literacy Service Planning and Co-ordination Committee, as well as potential literacy network activities, in response to the local conversations.

## Which similarities and differences between the perspectives surprise you?

|  |  |
| --- | --- |
| Clients | Practitioners |
| No mention of too many forms | No mention of too many forms either! |
| Reward/goal-directed | Focus on transition to long-term goal |
| Lack of accreditation/official documentation once LBS is complete | Want tools for accurate, effective referrals (automation) |
| Want comfortable “warm transfer” | Recognize value of co-location without a recognition of differing intake process/form |
| Common intake procedure |  |

Discussion points included

* client feedback re: wanting to have welcoming facilitators was not a surprise
* the idea of recognizing family emotional issues wasn’t mentioned, which was  surprising
* offering a “single point of contact in a timely manner” can be difficult when doing  referrals. It’s not realistic in either programs or in real life to only ever deal with one person. As long as there’s clarification given to the client of why you’re involving others, hopefully they’ll understand.
* a booklet for practitioners would be helpful, especially one made specifically for learners during transition times. That will ensure the most valid referrals (and consistency between practitioners) for transitioning learners.
* it was noticed that neither clients or staff said that lots of paperwork was a problem (or made things not welcoming)
* clients are focused on rewards and accreditation – they would like meaningful certification from LBS programs, but staff don’t make mention of that, which is a noticeable difference
* when it comes to referrals, clients are focused on “warm transfers”, and service providers are focused on automatic tools and processes for effective transfers
* co-location can be a good thing for referrals, but can be confusing and overwhelming for learners – especially if they need to fill out the same or similar paperwork multiple times. Common Intake Processes and forms would be helpful to overcome this
* clients are focused on environment, agencies are focused on process
* accommodation and accessibility are only mentioned by clients, but not by staff

Network response(s):

1. Create a booklet for practitioners to use with clients at times of transition.
2. Create a certificate of accomplishment that all agencies can use.

### How might you use this information at the agency level?

Suggestions included

* being mindful with programming and personal space when services get full.
* utilizing internal resources within agency.
* bring resources to learners.
* programs could encourage learners to do research on the next stage of their journey  during the last stage of their time in LBS so they know what to expect when they leave  LBS
* utilize internal resources within the agencies, and bring available supports to the  learner rather than expecting learners to go to / find them.
* being mindful of programming and personal space – adding more programming isn’t  always a good thing, if it gets overwhelming for the client.
* carefully selecting intake assessments, ongoing assessments, and exit assessments to  ensure transitions are effective
* using creativity at the program level to create warmth and a welcoming environment,  and the literacy network staff asked if anyone could share their creative solutions to create a welcoming environment. Solutions included
	+ introducing a lot of technology (iPads, use of phones in the classroom) to make learners feel more relaxed and comfortable.
	+ holding a dinner at the end of sessions to celebrate learner successes and create a relaxed opportunity to get to know each other on a different level.
	+ considering cultural differences in what constitutes a welcoming environment as what would be considered welcoming is different between client groups, and definitely different between streams. As an example, an Aboriginal program is looking at doing a smudging ceremony (weather dependent) for learners at entrance to the program, and on transition times – it has a huge impact on the feeling of welcome for Aboriginal clients.

Network response(s):

1. Invite Sarah Delicate to do a session on “Creating Welcoming Environments for Learners.”

### What are the community-wide implications?

Discussion included

* creating common intake processes/forms (EO).
* allowing all organizations to have LBS certificates (for recognition).
* marketing the value of LBS completion with employers and community.
* looking at creating an LBS-community-wide certification that learners could be  offered
* marketing the value and skills of LBS programming to employers and the community  at large – create an environment where learners can talk about their LBS education and  others will actually know what it means.
* using consistent and comprehensive Release of Information forms to allow sharing of  learner information from agency to agency.
* using Adult Education Techniques and Principals to create a safe, welcoming  environment
* keeping an eye on customer service stats as they are indicative of how welcoming  programs are

Network response(s):

1. Collect Release of Information forms from agencies and compare and contrast them to develop “The Best Release of Information Form Ever!” and share it with programs.
2. Continue to monitor Customer Service statistics at the community level and compare them to the Regional and Provincial statistics.

# Recommendations

Based on the findings of this project, we recommend that service providers:

###### Actively engage clients in their own learning and self-exploration, recognizing and tracking progress both informally and formally.

###### Provide an environment of care, compassion and outstanding customer service.

###### Explore and build partnerships with other agencies, within and beyond Employment Ontario.

###### Gather, provide and use labour market information when helping clients set goals, develop service/learning plans and transition to the next step.

###### Examine your communications and accommodations policies to ensure you are meeting your clients’ needs and preferences, and meeting legal standards.

# Communication of findings

Simcoe/Muskoka Literacy Network hosted two webinars to share project findings with adult literacy staff across Ontario. Webinar 1 was on February 5, 2015 to share preliminary findings. One hundred and four people registered and 70 attended. The webinar was recorded and can be found at <http://literacynetwork.ca/home/whats-new/>.

Webinar 2 was hosted on March 12, 2015 to share key findings after the majority of the data analysis was completed. One hundred people registered and 74 attended. The webinar was recorded and can be found at <http://literacynetwork.ca/home/whats-new/>. The webinar will be available on the Deaf Literacy Initiative website as of May 14, 2015 ([www.deafliteracy.ca](http://www.deafliteracy.ca)).

Simcoe/Muskoka Literacy Network revised the “Guide to Current and

Emerging Practices in Transition” to include data from the second phase of the project. This document acts as a tool for adult literacy staff to better understand how to support clients and their transitions between Employment Ontario programs. A copy of the revised guide can be found at [www.literacynetwork.ca](http://www.literacynetwork.ca).

Simcoe/Muskoka Literacy Network also created a one-page document called the EASE tool in English and Plan pout aider in French. This tool is a snapshot of the information from the guide, suggested by the advisory committee as a “desk aid” that agency staff could use to help support client transitions. A copy of the tool can be found in Appendix 5.

All project information is being shared through the regional literacy networks and Employment Ontario literacy and employment programs across the province. Simcoe/Muskoka Literacy Network will house the documents associated with the project on both their website and that of the Learning Networks of Ontario to ensure the tools created are readily available to service providers.

# Appendix 1 – FAQ sheet

## Enhancing Transitions – Client Perspectives Project \*Client Focus Groups at Employment Ontario Providers’ sites

##### FAQ – Frequently Asked Questions for  Focus Group Host Sites

## \*Note: the term ‘Clients’ applies to both Clients (in Employment Services) and Learners (in Literacy and Basic Skills)

1. Who is funding and managing the project?

The project is funded by MTCU and managed by the Simcoe/Muskoka Literacy Network in partnership with the Metro Toronto Movement for Literacy. Gay Douglas is project coordinator.

1. What’s this project about?

It aims to learn more about the clients’ experience of transition or referral from one EO agency to another. What worked? What could improve? What advice will clients give us about making the transition process as smooth as possible?

1. How many focus groups will be held, and where?

8 focus groups will be held – 4 in the Simcoe/Muskoka regions and 4 in Metro Toronto.

1. What are the criteria for clients to participate?

Clients should have experienced a referral

**-** **to your agency** from another EO provider, either Literacy and Basic Skills (LBS) or Employment Services (ES) or

**-** **from your agency** to another EO provider or community wrap-around service.

1. How many clients do you need to hold a focus group?

8-12 clients would be an ideal size for a focus group. We will invite clients from other ES and LBS agencies to register for the focus group, and travel to your site to participate.

1. How long will the focus group be and how does it work?

The focus group will last about an hour and a half, including set-up and clean-up. It’s designed to be informal and relaxed. We will provide refreshments, a facilitator and a note taker. We are asking the same 5-7 questions in each group. Answers will be confidential and the names of focus group members will not collected or used in any reports.

1. What are the benefits for my clients to participate?

Clients will have the opportunity to share their experiences, which in turn will help future clients. Participants will enjoy the refreshments and be given a $20 gift card. A maximum subsidy of $20 is available to help cover transportation or baby-sitting costs for clients who need it and are not otherwise subsidized.

1. If we host a focus group here, what are our responsibilities?
2. Set aside a private room large enough for 8-12 people to meet.
3. Select a staff person as a single point of contact to communicate with clients and the project manager.
4. Review your current clients to identify those who have been referred (see Criteria, #4 above) and approach them individually.
5. Post a poster (we will provide) asking clients to approach a staff person (of your choosing) to sign up for the group if interested and appropriate. (see Criteria, #4 above)
6. Use both a) and b) - whatever method your site chooses.
7. Register the names of the interested clients so that you can remind them of the date and time of the focus group.

Thanks for your help with this project!

Questions? Email douglasandassoc@gmail.com or call 289-214-4721

# Appendix 2 – Focus Group Findings

The objective of Phase Two was to gain the perspectives of Employment Ontario (EO) clients who have experienced referrals and transition between Employment and Literacy services, and to better understand what worked best for them when referred and/or transitioned to another service provider.

In Phase One, agency staff identified these factors as indicated above:

1. Having relationships with transition partners

2. Creating a comfort level for the client/learner

Clients in Phase Two also identified both of these factors, in addition to those listed in Table 2: Comparison of staff perspectives to client perspectives. It is not at all surprising that, given their differing points of view, EO agency staff and clients described these factors differently. Agency staff members have multiple accountabilities – to the client, the funder and the agency itself – and their comments reflect leading practices in service delivery, performance management and formalizing transitions. Clients are accountable to only one party – themselves. Their comments reflect leading practices that benefit them as individuals, satisfy their emotional needs and prepare them for the next steps.

The results of client consultations were remarkable.

#### Focus group participants did not identify their own skills, attitudes or motivations as factors in the transition process.

In Phase One, when identifying key factors influencing clients’ transition from one service to another, most EO agency staff members described client readiness in terms of observable client skills, attitudes and motivations.

In Phase Two, none of the 80 focus group participants identified their own readiness as a key factor influencing their transition from one service to another. This may be because clients

* are firmly entrenched and focused on priorities within the agency in which they are currently receiving services
* may not be aware of the mandate or limits of service of the agency where they are currently receiving services
* may not be aware of appropriate options for their next steps
* may believe that when transition to another program is appropriate, it is the agency’s responsibility to guide them
* may lack the introspection to understand their own strengths, challenges and readiness for next steps.

#### Clients were very clear in describing agency features and practices that would ease their transition experience.

Focus group participants described practices in communications, accommodations and environments that aided in their transition into current programming. They described effective service delivery features, strategies and tools that informed and motivated them toward their next steps. They identified the importance of a single point of contact and timely communications as key factors in easing their transition to the next step, a factor agency staff did not identify.

#### Clients described the importance of their feelings, generated in a safe, welcoming, client-focused agency.

Focus group participants validated the principles of respectful, compassionate, client-focused services, emphasizing the importance of programming that enhances their self-awareness. They identified the importance of understanding their strengths, weaknesses and monitoring their progress toward goals – goals that improve their personal lives in addition to learning or employment opportunities.

#### Clients want to understand all the options available to them.

Focus group participants described co-location and partnerships among agencies as an important element in easing their transition. They identifed not only the value of having a variety of diverse services (“a one-stop shop”) in the same building, but also the opportunity to tour other agencies. Clients want to know that their chosen learning or employment goals are realistic in their chosen labour markets.

#### Clients in the Francophone and Deaf streams identified numerous barriers in their transition to the next step, whether to another service provider or to employment. Clients in the Anglophone stream did not identify any such barriers.

Participants in Francophone and Deaf focus groups identified common barriers in some workplaces and service provider agencies. They said that communications were often not available in the appropriate language (ASL or French) or in their preferred modes (text, e-mail or phone). They described “revolving” or “closing doors” because some services and employers are unaware of what accommodations were necessary, available or legally required. They identified the lack of knowledge and resources (money, staff, and time) as underlying reasons that accommodations were not made. They also felt that organizations and businesses need to have policies to ensure that accommodations are made.

Based on the findings of this project are the following **recommendations** for service providers:

###### Actively engage clients in their own learning and self-exploration, recognizing and tracking progress both informally and formally.

###### Provide an environment of care, compassion and outstanding customer service.

###### Explore and build partnerships with other agencies, within and beyond Employment Ontario.

###### Gather, provide and use labour market information when helping clients set goals, develop service/learning plans and transition to the next step.

###### Examine your communications and accommodations policies to ensure you are meeting your clients’ needs and preferences, and meeting legal standards.

The comparison of client perspectives to staff perspectives from the earlier project shows both commonalities and differences. We can still learn more from the experiences of both parties. Through on-going discussions and active listening about their mutual needs and priorities, the perspectives of Employment Ontario staff and clients will more strongly align.

# Appendix 3 – Townhall Findings

Simcoe/Muskoka Literacy Network – Town Hall meeting Barrie, February 5, 2015

On February 5, 2015, the Simcoe/Muskoka Literacy Network hosted a “town hall” meeting to share the results of the Enhancing Transitions-Client Perspectives project and to discuss how these findings might impact community planning and agency practices. The chart below summarizes the findings.

What matters to clients?

|  |  |
| --- | --- |
| **Partnerships*** Facilitated referrals
* Knowledge of other community agencies beyond EO
* Directory of services
* Itinerant offices
* Guest speakers
* Tours
 | **Customer service – Environment*** Safe, welcoming, relaxed, comfortable
* Professional, respectful, personable
* Recognize family/emotional issues
* “Treats us like adults - training wheels are off”
* “Casual, comfortable, compassionate”
* Single point of contact, timely
 |
| **Customer service – Accommodations*** Flexible times/days
* Accessibility (more than physical)
* Equipment and technology to support learning needs/styles
* Appropriate communication preferences (e.g. text/email rather than phone)
* Knowledge of accommodations needed and resources available
* Policy/protocol for providing accommodations
 | **Customer service – Service delivery*** Customized to each client
* Client-centered approach (one-on-one, even in classroom)
* Self-paced
* Focus on client self-awareness – strengths and challenges
* Goal-directed
* Meaningful for life and work
* Show progress, give certificate
 |
| **Co-location*** Beyond EO – health, food, childcare, etc.
* Simplify referrals
* Next steps identified and accessed without travel/time
* Common intake/assessment process
* Efficient and effective – seamless for clients
 | **Labour market information*** Data on local jobs and who is hiring
* Knowledge of emerging and declining industries
* Provide wage expectations
* Understand training and credentials needed
* Offer LMI from other communities/provinces
 |

After the findings were shared, the group broke into a “Conversation Café” during which these questions were discussed in small groups.

## Questions for Conversation Café:

1. Look at all the client priorities

Do these priorities surprise you? Yes or No? Which did you expect? Which is a surprise?

1. Look at the client priority assigned to this table

Does your program currently meet this client priority?

If yes, how? (Best practices)

If no, why not? (Barriers)

What practical changes could we make now in our programs to meet this client priority? (Innovations possible with current resources)

What else do we need to make these changes? (Resources needed)

Below is a summary of highlights from the Conversation Café:

* Findings are not surprising – the factors identified by clients reflect adult learning principles, which should already be in place
* Partnerships may be more easily achieved than co-location (partnerships require fewer resources, are more flexible and are not as long-term as co-location)
* Additional funding is needed for agencies to for enhance current resources allocated to the referral/transition process
* Suggestions for local action
* a joint, streamlined intake form (LBS and ES)
* more professional development for staff – about the range of services within the community
* methods to track progress of online learners so that agencies are aware of learner progress
* increased funding:
* more one-on-one learning
* adequate accommodations (French/ASL)
* certificates for training – LBS and ES
* more specific local and distance labour market information

# Appendix 4 – Phase 1 and 2 Comparison Chart (Mapping)

## Effective transitions - comparing Staff perspectives (Phase One) to Client perspectives (Phase Two)

| Common Findings: staff and clients“What do staff and clients agree upon about what matters during client transition?” | Phase 1 - Factors influencing client transition Staff described it this way | Phase 2 - Factors influencing client transition Clients described it this way | Factors identified by clients - not staffWhat do clients think is important that staff don’t? | Factors identified by staff - not clientsWhat do staff think is important that clients don’t? |
| --- | --- | --- | --- | --- |
| A safe, welcoming, respectful environment where a client can thrive. | Client readiness* “Open” attitude to support, comfort level
* Basic needs are met
* Trying something new, conquering fears and anxiety
* Client motivation and commitment
 | Learning environment* Safe, welcoming, relaxed, comfortable
* Professional, respectful, personable
* Recognize family/emotional issues
* “Treats us like adults - training wheels are off”
* “Casual, comfortable, compassionate”
* Single point of contact, timely
 | Single point of contact at new program, timely communications | Client readiness – attitudes, motivation, commitment |
| Personalized, practical, flexible, goal-directed programming | Client skills* Essential (basic) computer skills
* Employment goal
* Communicating with others
* Basic problem solving skills
* Life skills
* Client-focused transition plan
* Concrete goal in place
 | Aspects of service delivery* Customized to each client
* Client-centered approach (one-on-one, even in classroom)
* Self-paced
* Focus on client self-awareness – strengths and challenges
* Goal-directed
* Meaningful for life and work
* Show progress, give certificate

Accommodation* Flexible times/days
* Accessibility (more than physical)
* Equipment and technology to support learning needs/styles
* Appropriate communication preferences (e.g. text/email rather than phone)
* Knowledge of accommodations needed and resources available
* Policy/protocol for providing accommodations
 | Clients value learning AND life impacts and effectsAccommodations – schedule, technology, policies, communication – are important | Concrete skill acquisition  |
| Concrete plans, realistic goals and information/access to next steps. | Effective Practices for Transition:* Screening and referral tools
* Service directories
* Joint planning and partnerships
* Networking, workshops and information sharing
* Co-location
* Resources targeting employers, employees and learners
 | Partnerships* Facilitated referrals
* Knowledge of other community agencies beyond EO
* Directory of services
* Itinerant offices
* Guest speakers
* Tours

Co-location* Beyond EO – health, food, childcare, etc.
* Simplify referrals
* Next steps identified and accessed without travel/time
* Common intake/assessment process
* Efficient and effective – seamless for clients

Labour market information* Data on local jobs and who is hiring
* Knowledge of emerging and declining industries
* Provide wage expectations
* Understand training and credentials needed
* LMI from other communities/ provinces
 | Explicit suggestions for inclusion of wraparound services – focus on “what” is neededCommon intake procedureLabour market information to identify jobs | Focus on “how” transition is facilitated and tools to aid transition |

# Appendix 5 – EASE Tool