Information and Referral

# Getting Down to Basics: Service Delivery in LBS Agencies

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All information and URLs were accurate at the time of publication. The Government of Ontario and its agencies are in no way bound by the recommendations contained in this document.

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# Contents

# Introduction

This chapter provides an overview of the service delivery function of Information and Referral. Experienced practitioners and those new to Literacy and Basic Skills (LBS) will benefit from the information, tools and resources that are specific to this LBS service.


Information and Referral is the first of the five services provided by LBS Service Delivery Agencies. This service is listed first in the Literacy and Basic Skills Service Provider Program Guidelines and it is the first service provided to individuals, partner agencies and the community. It is said "first impressions last the longest," so, as our I & R service is the first exposure others have of us, it is critical to get it right.

The Information and Referral (I & R) service incorporates two activity areas:

- providing information to other parties
- making referrals to, and receiving referrals from, other programs and services

There is a third activity, though, which is interwoven through both information and referral, and that is collaborating with partners.

According to the LBS Service Provider Program Guidelines:

> "The Information and Referral service ensures that information about the LBS service provider's literacy training opportunities, approaches and targeted clients is available to learners, clients, volunteers, other interested individuals and referring organizations.
>
> LBS service providers also offer information and referrals to all Employment Ontario employment and training programs and services."

When we discuss I & R as a Literacy and Basic Skills delivery service, we need to look at it in the context of the Ontario Adult Literacy Curriculum Framework (OALCF as that is the framework for the 'product or services/training' that we are 'marketing.' Therefore, we need to have a solid understanding of that framework. If you are not already familiar with the OALCF, we recommend that you work through the OALCF chapter of this Guide.

To help with clarity when reading this chapter, clients are those who initially contact or connect with our agency but who have not yet registered or who may not even be registering in our program. Whereas, learners are clients who have already been registered in our program.

> People needing answers and help often do not know where to begin, so they may not get the assistance they require, or they may waste a lot of time searching through various websites or calling multiple places with mixed results. With I&R they receive the information they need in one simple step. Alliance of Information and Referral Systems

## Ministry of Training, Colleges and Universities' Requirements

The LBS Service Provider Program Guidelines contain two sections that deal with Information and Referral. One of these, section 3.1, Program Delivery, Roles and Responsibilities, states that:

"All EO service providers must provide information and referrals to all EO employment and training programs and services, regardless of which programs or services they are contracted to deliver.

Each LBS Service Provider must:

- have an efficient and effective process to identify each client's information and referral needs;
- make information about all EO Services accessible to the client (e.g., print, telephone, digital media);
- ensure clients receive accurate and current information on the EO services relevant to their needs;
- help clients understand their program and service options from across the EO network;
- match clients with the service and provider that best meets their needs efficiently, accounting for culturally-appropriate service delivery;
- continually improve their information and referral service, based on client feedback; and
- ensure their contact information and service descriptions are accurate and timely on the Web, in social media, and in any print materials."

The second section, 3.1.1 Program Services, Information and Referral, adds more details about MTCU's expectations regarding the provision of information and referrals to all Employment Ontario employment and training programs and services.

"LBS service providers must:

- promote the LBS Program within the community, as part of an integrated system of literacy service provision within Employment Ontario, and with related programs and services provided by other ministries and other levels of government;
- evaluate the effectiveness of the outreach strategy and activities, and revise accordingly;

- coordinate and integrate services to provide learners with supported access to other services that help them achieve their goals;

- ensure that the LBS service provider's information and referral services build on the results of the literacy services planning and coordination process and are complementary to other resources in the community; and

- implement a systematic approach to tracking, reporting, and analyzing information and referral activity and follow-up."

Based on these two sections of the LBS Service Provider Guidelines, we have summarized the I & R service with the following four topics:

- Client and Learner Needs Determination

- Service Coordination, Integration (with other LBS service providers, within EO, and within the community) and Information Gathering (on LBS programs, other EO programs and other community and government services which can support clients and learners to reach their goals)

- Outreach and Communications

- Recording, Tracking and Evaluating Information and Referral (for each of the above)

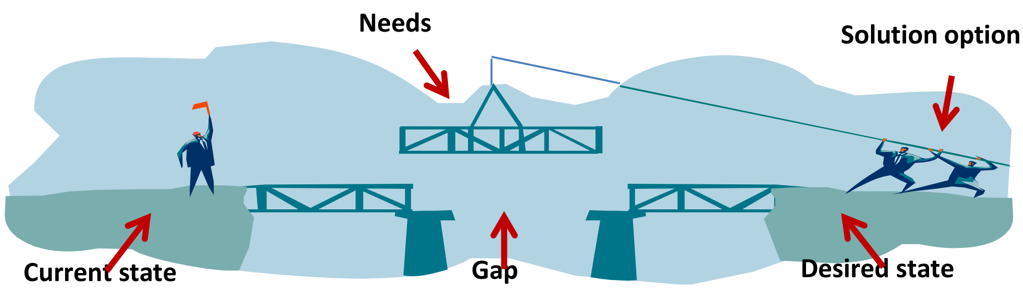
> "Information and Referral services ensure that information about the LBS service provider's program is available to learners, clients, volunteers, other interested individuals and referring organizations. Through the Literacy Services Planning and Coordination (LSPC) process, a community-wide marketing and promotion strategy is developed. At this stage, the service provider will often conduct general literacy screenings of clients, to determine if the LBS program is appropriate. LBS service providers also offer information and referrals to all Employment Ontario employment and training programs and services."
>
> LBS Service Provider Program Guidelines

# Client and Learner Needs Determination

In order to be successful, Literacy and Basic Skills (LBS) programs need to provide the information and the referrals that effectively address the needs of clients (those who walk into our programs or contact us in other ways) when they initially connect with our agency and on an ongoing basis if they register in our program. Needs determination is the basis for providing the most helpful services, supports and programs related to an individual's needs.

A needs determination (sometimes called needs gap analysis or needs assessment) is a method for determining client/learner needs and finding ways to attend to them. Needs can be merely wants or options or they can be necessary, must-haves or requirements. Needs can also be problems that require solutions. Generally speaking, needs are what has to or should take place to move from the way things are (current state) to the way they should be (desired state). A needs determination deals with this gap.

**Needs Gap Analysis**




**<u>An example</u>**:

- **Desired State:** Dawn went in to Connections Adult Learning with a request to learn two things that she didn't know in Excel. After a little discussion, Dawn also said that she was out of work and that she wanted to be a bookkeeper or work in administration in another capacity.

- **Current State**: As the literacy worker talked with Dawn, she found out that Dawn hadn't worked on Excel since the 2003 version. The interview also revealed that Dawn had no accounting software training and she did not seem to know about double-entry accounting.

- **Needs:** Together they did a little occupation and labour market research. Through this information, they found that in order to meet her goal, Dawn would need bookkeeping knowledge, up-to-date spreadsheet training, a good understanding of accounting software, and most likely a college certificate or diploma. The Essential Skills Profiles for Bookkeeper show that a level 4 is needed in numeracy and digital technology and a level 3 for the rest of the skills.

- **Gaps:** The worker then suggested an LBS assessment to determine Dawn's OALCF levels. This would help to determine if she needed to upgrade any of the competencies in LBS and if she had sufficient levels to fill other gaps needed to reach her goal (bookkeeping credit, software training, possible college program and funding for it). Dawn's assessed skill levels in the Understand and Use Numbers competency showed some gaps.

- **Solution Options:**

| Solution | Referral |
|---|---|
| Upgrade skills in Understand and Use Numbers and Digital Technology to the end of level 3, including some applicable software programs | Blended Literacy and Basic Skills training |
| Do more in-depth research on her occupation choice and labour market | Employment Ontario - Employment Services |
| Take a high school bookkeeping course | Local adult high school program, online credit courses or ILC.org |
| Consider a college program in Administration or similar occupation | OntarioLearn website and college sites for further information on requirements, costs and availability of courses. Employment Services and OSAP website for possible funding options. |

Not all of the solution referrals need to take place at the initial interview. Some may be more appropriate for a future date, when the client/learner is ready to move to another step towards their goal.

## LBS Practitioner Responsibilities

When a client walks in our doors, we are expected to determine what the client needs. In some cases, it may turn out that LBS services are not what the client is really looking for or what they really require.


LBS practitioners are not expected to be able to meet all of a client's or learner's needs. However, we are expected to "have a process in place to identify their information and referral needs in an efficient and effective way." (LBS Service Provider Program Guidelines) Your program may have already developed its own processes. If this is not the case, here are some important steps to include:

1. Determine the client's or learner's needs through a needs gap analysis. (For more on this, see Client and Learner Needs Determination earlier in this section)

2. Determine if there are resources within your agency or the community to meet these needs. (See Identify Appropriate Interventions or Solutions further on in this section)

3. Make appropriate referrals using established protocols.

4. Some clients or learners are able to do their own research, make their own contacts or make their own appointments if you give them the information that they need. On the other hand, if it appears that they need help to connect with the suggested agency or person, provide them with appropriate assistance.

5. Document the information that you gave to the person (if appropriate) or referrals you made in the learner's files. For learners, input a Referral Sub-goal and Plan Item into the EOIS-CaMS or provide the information to the staff member who does the EOIS-CaMS updates.

6. Follow up with the learner or service (if you have permission) to ensure that the learner was able to get the help/service needed.

7. Document the referral result in the learner's file and in EOIS-CaMS.

### Identify the Gap and Need

As we have said, the first step in the needs determination process is identifying the gap between the current and desired situations. As shown in our earlier example, to do this we need to find out what the client's or learner's current "state" is and where the client or learner wants to be or what they want to do ("desired state"). As each gap or issue will have different solutions, it is important that we are clear and specific. For example, a client may walk in and tell you he needs help writing a resume. In the following chart, we have set out some basic current/desired state pairs that we might discover through investigation:

| **Current State** | **Desired State** |
|---|---|
| Does not have the writing and document use skills to complete a resume | Have the writing and document use skills to complete a resume and similar documents |
| Doesn't have the computer skills to do a resume on a word processor | Have the technological skills that would allow him to create documents such as resumes, using computer software |
| Has a resume that needs one item added to it | Have someone add the item for him |
| Is out of work and needs even further help in finding a job than a resume | Have the job search skills to get a job<br>Have a job |

There are a number of "investigation" methods to help you determine the need. Different techniques may be more suitable for different circumstances. Combinations of techniques may be necessary to drill down to the problem. Here are some suggested methods:

- **Observation** – Sometimes just watching a client or learner can provide insight on what the "gap" might be. For example, you might notice the learner seems to have vision problems that are affecting the learner's ability to read.

- **Asking** – Whether within individual interviews, focus groups or questionnaires, we can often find out what a client or learner wants just by asking. Asking questions during an interview would probably be the best technique in our example of the client who wants help with resumes.

- **Discussion** – Regularly discuss learners' needs with them. Provide open opportunities to discuss challenges and barriers. Consult with people in key positions or with specific knowledge. Sometimes, caseworkers or relatives can provide insight into clients' or learners' needs (if you have permission to discuss them). In our example of the resume writer, input from an Employment Services consultant would be useful.

- **Assessments, tests and work samples** – Using these tools may provide you with insight to the specific skill gaps that need to be addressed. Make sure, however, that assessment and test tools and solutions are appropriate to the client/learner goals. Work samples from an employer are particularly useful as they provide context to the skill gaps.
- **Records** – School records such as Individual Education Plans (IEP) and high school transcripts can be very useful.
- **Research** – To determine the true gaps, you may need to investigate what the "desired state" entails. For example, you might use the Essential Skills Profiles to determine which competencies and levels are necessary for employment in a particular occupation.

Wellington County Learning Centre's Screening Questions Interview Form helps them determine what a client needs. You can find a copy of this form in the Sample Forms section of this chapter.

Trust and a supportive relationship help in determining learner challenges and needs. The willingness of learners to disclose (directly or indirectly) the challenges that they have and the support that they need to address them may depend on trust. This trust can be developed between a learner and a staff member over time. The identification of needed supports is most likely to occur when the learner feels that the service provider is trying to address challenges and solve problems and is not judging the learner. Once the relationship is established, learners understand that some gaps can be addressed outside the LBS Program and that staff will facilitate the necessary referrals to other service providers.

When investigating gaps, remember that actual needs are not always the same as perceived needs or "wants." People do not always know what they need. Sometimes, they want to learn things that they don't really need to reach their goal. Sometimes, they do not want to carry through on a suggested referral. It is important to involve the client in the needs determination process and ensure that you both have a thorough understanding of the goals, gaps and steps to the "desired state". Providing the client with a thorough understanding, options and encouragement may help the client to make the intial steps towards their goal.

## Identify Appropriate Interventions or Solutions

After we have discovered the client/learner gaps and needs, we can begin to recommend strategies and supports aimed at eliminating the gap between the current, “what is”, and the desired, “what should or could be.”

At this time, it is also important to determine if Literacy and Basic Skills (LBS) services are appropriate for the learner. Is the client eligible? Is the learner suitable? Does your agency have the capacity or is there a wait list? The Iroquois Falls Adult Learning Centre created an Eligibility and Suitability Form to help them establish if a learner is right for their program. You can find a copy in the Sample Forms section of this chapter.

The needs determination may establish that other services would best assist the clients/learners to reach their goals. In these cases, we should take care that we match clients with the service and provider that best meet their needs in the fewest possible steps. Referrals to other services need not happen in isolation from LBS learning. By providing supported access to other services we can all help clients/learners achieve their goals.

## Supports and Referrals for Learner Success

LBS learners, as do other adults, have many issues, pressures and responsibilities in their lives. Balancing these against the demands of learning is often difficult. It doesn’t take very long in the LBS field for practitioners to know that many literacy learners face challenges beyond the mandate and funding of LBS services. In fact, most literacy learners need some supports other than quality literacy instruction in order to succeed. If learners do not have the time, energy or focus for their learning activities, they will not make the progress required to reach their goals. Personal worries and challenges can divert a learner’s efforts from their LBS learning.

*OALCF Supporting Learners through Service Coordination and Referrals* reports that research has identified fifteen supports, falling into five categories, which are important for learner success.

- **Financial/Material Supports**
    - Income Support
    - Transportation
    - Childcare

- **Academic Supports**
    - Learning Disability Assessment/Programming
    - Tutoring/Mentoring
    - Monitoring/Support of program participation

- **Employment Supports**
    - Job Search
    - Monitoring and support for entry or re-entry into the workforce (e.g., orientation to workplace, work experience and job coaching, motivation/attitude regarding employment)

- **Social Service Supports**
    - Housing Assistance
    - Legal Assistance (including parole, pardon, custody, Children's' Aid)
    - Personal/Family Counselling (including Anger Management/Stress Management Groups)
    - Life/Social Skills (e.g., time management, interpersonal skills, assertiveness, problem solving, conflict resolution)

- **Health Supports**
    - Mental Health Assessment/Support
    - Addiction/Substance Abuse Counselling or Program
    - Food/Nutrition

It is not possible for LBS programs and practitioners to develop the skills and expertise to help learners with all the issues that may be overwhelming them. Instead, by using service coordination and referral, we can link learners to the non-instructional supports they need. To do this we must have the knowledge, partnerships and tools that enable us to provide timely access to the required supports and services within our communities, over the Internet, etc.

For example, John is a learner at your program. He has always been a happy, energetic and motivated participant. You notice he is tired and fidgety and not applying himself. You sit down with him and tell him how you have noticed a difference. You ask if there is something troubling him that you could help with. He tells you that his wife has been laid-off from her job, so now he doesn't know how they are going to feed their family. If you do not know already, you research where there is a local food bank. You obtain an application (or let John do this if he is able) and help him to fill it out, if necessary. You check with John in few days to ensure he was able to go to the food bank and get support.

## Using 211 Ontario

An excellent source for information about services is 211 Ontario. According to their website, through their telephone hotline (dial 211) and their website search tools, 211:

- provides a gateway to community, social, non-clinical health and related government services.
- helps to navigate the complex network of human services quickly and easily, 24 hours a day, 7 days a week, in over 150 languages.
- connects people to the right information and services.

For information on how to search for information using 211 Ontario, check out their video *How To Search 211 Ontario* on YouTube.

211's customer satisfaction tool showed that:

- 82% are Very Satisfied with 211
- 88% would call 211 again
- 86% of callers followed up on the referrals provided
- 87% feel they are better prepared

2016 Survey Results

## Recording Information and Referral

There is an expression, "If you don't write it down, it didn't happen." That may be true if you don't record your information and referral activities and that isn't to your advantage. Service Coordination in the form of referrals in and out of your program is a significant factor in MTCU's rating of your LBS service provision. In fact, to meet your LBS Service Quality, Service Coordination targets, 50% of your exited learners need to have had either a referral in from or a referral out to an education, training, employment or other community resource.

MTCU tracks our referrals through what gets recorded in EOIS-CaMS.

We need to place "referral in" and "referral out" information in the EOIS-CaMS learner plans (service plans), as well as in our hard copy learner files. When a learner first registers with us, they are asked how they were referred to our program. This information is recorded on the Employment Ontario Participant Registration – LBS form and entered into the EOIS-CaMS database along with other initial data. Not all referral options are counted in the calculation our Service Coordination, in Report 64. For example, the following three Referred-In options are not counted:

**Referred In:** The learner has been formally referred, through a recognized referral process, not word of mouth, to the LBS Program service provider from another EO service provider or other community organizations and services.

**Referred Out:** The learner has confirmed that they are registered, participating in or receiving services with an Employment Service, education, training or community resource provider, as a result of the LBS Program service provider.

- EO – Literacy and Basic Skills Service Provider
- Informal Word of Mouth/Media Referral
- No Response

Outgoing referrals are entered into EOIS-CaMS as sub-goals of the learner plan (service plan) whenever they occur: at intake, throughout the training or at exit. As in the referrals-in, not all Referred-Out selections in EOIS-CaMS are included in the calculations for Service Coordination. For specific referral options that are included in this calculation, refer to *Employment Ontario Information System (EOIS) Case Management System Service Provider User Guide* by logging into myEOIS.

An up-to-date learner plan is a good place to track these referrals. This practice also provides learners with a broader view of their plans and the supports that they need in order to help them to reach their goals.

In CaMS, we also input our monthly Information and Referral statistics under two headings:
- Resource and Information for Information Sessions provided to various audiences
- Participation for referrals to other LBS programs or other services

## Service Information Gathering, Coordination and Integration

It may seem odd that we have grouped these concepts into one heading. However, Service Information Gathering, Service Coordination and Service Integration are all about knowing your community and working within it. They are about supporting people in reaching their goals. This is something that all stakeholders – funders, partners, consumers (clients, learners, etc.) and our own organizations and staff – want to happen.

Earlier, we talked about the MTCU Requirements for Information and Referral. It is worth reviewing those that relate to Service Coordination, Integration and Information Gathering:

- ensure clients receive accurate and current information on the *EO services relevant to their needs;*
- help clients understand their program and service options from *across the EO network;*
- match clients with the service and provider that best meet their needs efficiently, accounting for culturally-appropriate service delivery;
- coordinate and integrate services to provide learners with supported access to other services that help them achieve their goals; and
- ensure that the LBS service provider's information and referral services build on the results of the literacy services planning and coordination process and are complementary to other resources in the community

**Integration** – Service delivery goals, processes, infrastructure and technology are aligned across channels allowing all EO service providers to meet client need and provide seamless service.

**Community-Based Coordination** – All Employment Ontario service delivery is provided throughout the province by service providers that coordinate their work at the community level through participation in the local planning and coordination process.

Literacy and Basic Skills Service Provider Guidelines, 2016

## Learning About Community Supports

As LBS programs work to provide the best possible customer service, a shared awareness among community services is essential. Reciprocal knowledge is the key to

- appropriate referrals from other services
- supported access to needed services for LBS clients and learners


Here are five ways to gather and share information in your community.

### Interagency Meetings

Many communities have regular interagency meetings where various service providers get together to explain what they do, provide agency updates and share information. Some of these are held as brown bag lunch meetings, while others include speakers, workshops or presentations. These forums are a good way to learn about other service providers and keep informed about new initiatives and programs in your community.

### Speed Networking Sessions – Community Development Information Sharing

During a lunch or an interagency workshop/meeting, hold a "*Speed Networking*" session. This is based on "*Speed Dating,*" where people have short meetings with multiple potential dates. In Speed Networking, the people are agency representatives and the discussions cover rapid introductions, what each of the agencies do, and how they can work together.

### Learner Information Boards

The Literacy Council York-Simcoe conducts research on their local community referral services and transition partners. They post the information on a learner information board which is located where the learners enter the agency. This way, learners (and practitioners) can easily access the information whenever it is needed. Also, as learners see the information every time they come in, it becomes less foreign and intimidating.

### Visits and "Field Trips"

For the PTP Adult Learning and Employment Programs, "getting out" was the answer. Several years ago, they decided to focus some of their professional development on improving staff knowledge of next-step destinations and support services for learners. PTP visited a number of schools (for example, Emery, Yorkdale, and Burnhamthorpe Adult Learning Centres run by the Toronto District School Board) and trainers (for example, The Ability Learning Network, The YMCA's and the Daily Bread's food services programs) to learn about admissions, programs, etc. Some of their most important learning was gained through visits to service providers. PTP practitioners aren't the only ones who go visiting. PTP takes learners on field trips to visit other service providers and especially to transition partner programs. And, of course, PTP reciprocates by inviting and welcoming the service providers back for visits at the PTP sites.

### Online Communities

As part of the *Exploring Learner Pathways: Visualizing the Learning Journey* project, MTML (Metro Toronto Movement for Literacy) launched the OKLearn.ca website. According to their Project Background information:

"The OKLearn.ca website is an online toolkit aimed at providing adult learners and the front lines of adult education in Toronto and York Region – teachers, intake staff and assessors – as well as others who refer adults to the broad array of education and training programs, with easy-access visual materials and information that can definitely enrich that all-important initial conversation about next steps along the learning journey.

The site houses pathway charts, information about publicly funded adult education programming in Ontario, and a host of other information pieces that raise awareness about common transition points, the complexity of learners and their needs and how to better navigate the information that exists out there about adult education options."

MTML also has an online community and staff groups section on its website that encourages discussions and collaboration among community partners and LBS programs in the Toronto area.

## Strengthening Ontario's Adult Education System

MTCU research shows that clients want integrated service with effectual procedures for referrals throughout the employment and training system and between service providers from other ministries and the community. Clients want to be able to find services easily, with no hassle. They want staff to be aware of all their needs (not just one particular aspect, e.g., literacy) and for staff from different services to communicate and refer effectively and efficiently.

On December 1, 2017, the Ministries of Advanced Education and Skills Development (now the Ministry of Training, Colleges and Universities), Education and Citizenship and Immigration released a consultation paper, *Strengthening Ontario's Adult Education System*. From December 1, 2017 until January 31, 2018, Ontarians were asked to share their feedback on the ideas, priorities and proposed plans for:

- finding information about the system
- improving how learners enter adult education programs
- supporting regional collaboration and partnerships
- recognizing individuals' prior learning
- the development of a core competency framework

### What They Heard

Feedback was received through 80 written submissions and 87 in-person regional focus groups held with adult learners. The adult learners and respondents provided creative and thoughtful responses. *Report: Improving adult education* summarized and categorized what was heard, under the following themes:

- improved integrated information about programs
- better wrap-around supports for adult learners across programs
- clearer and more coordinated intake, assessment and referrals in programs
- better guidance and pathway planning supporting smoother learner transitions between programs and services
- enhanced regional collaboration among providers and support organizations

Integrating services does not mean that everything is provided by one agency or delivered in one place. It means managing services so that they are not disjointed, they are easy for the client to navigate, and they achieve continuity of service over time. Integration can mean working in conjunction with other Employment Ontario services, across sectors or Ministries to meet the needs and support the clients and learners.

## Forming Successful Partnerships

Partnerships, coalitions, affiliations, alliances and collaborations are words to describe an arrangement in which all the parties agree to cooperate to further their common interests. Organizations may partner to increase their reach, achieve their goals and/or accomplish their mission. Publicly funded organizations are increasingly evaluated by the level and quality of their partnerships with other organizations, services and social sectors. As Employment Ontario partners, it is an expectation that we will partner within the EO network and within our community.

### Benefits of Partnerships

There are many ways that partnerships can be beneficial to the collaborating parties. Although each individual partnership has its own unique advantages, some general benefits come about by:

- eliminating duplication and addressing gaps
- avoiding competition
- breaking down barriers between programs
- pooling resources
- gaining and sharing expertise and approaches
- providing varied perspectives to plan, evaluate, address problems, find solutions and develop strategies
- exposing partners to larger and more diverse markets

## Challenges in Partnering

However, not everything is rosy when you are trying to “feed” a partnership. There are also some challenges that you need to be prepared for:

- Partnerships can take a long time to establish
- Considerable energy may be needed to build and maintain the partnership
- Staff time is needed to manage and support a successful partnership
- It can be challenging to come to mutually satisfactory decisions
- Things that need to be addressed and negotiated for agreement:
    - Partnership and individual goals
    - Areas of responsibility
    - Lines of authority
    - Information sharing and distribution
    - How success is evaluated

Some give-and-take is required. You may not get everything you want, but is it enough to be advantageous? Will it benefit clients and learners? Will it be advantageous to the other partner(s)? If so, a partnership can be formed.

## Developing a Partnership

Worthwhile partnerships take some care in building. Establishing community collaboration is a process that takes time and energy. You should not just jump right into it and you shouldn’t expect another person or agency to either.

1. **Do a needs assessment**
    - What need do you have to fill?
    - What outcome are you expecting?
    - What are you looking for from partners?
    - What can you offer to partners?
    - Are you ready to partner? Do you have the capacity? Do you have the support systems for partnering (staffing time, resources, policies, procedures, etc.)?

2. **Look for potential partners**
    - Consider services, values, reputation, etc.
    - Successful partnerships are based on shared interests.
    - Find out which person or people you should be working with. Make sure they have the authority to commit the organization to a partnership that meets your needs.
    - Prepare a list of “benefits” to the prospective partner(s) to act as incentives for both their management and front-line staff to buy-in to the relationship.

Community Literacy of Ontario developed a Partnering Policy and a Partnership Checklist, which may be useful to you. These can be found in the Sample Forms section of this chapter.

3. **Be open to other ideas**
   - A partnership is not a one-way street. Remember that the relationship also needs to meet the partners' needs.
   - Be prepared for potential partners to bring other ideas to the process.

4. **Make clear agreements and protocols.** Depending on how formal and involved the partnership is, these may be verbal or in writing**.**
   - If all partners have formally agreed on their expectations from the partnership, there will be less chance of misunderstandings and disputes later.

| Terms & References | Comment |
|---|---|
| **Partnership Relationship Management**<br>Working effectively with other service providers, local community groups or individuals from, or funded through, other ministries and divisions within MTCU in order to deliver seamless, well-coordinated services. | LBS works closely with Ontario Works in local communities even though LBS and OW are associated with separate government ministries (MTCU and MCSS). Effective partnership relationship management is demonstrated when both partners share a common understanding of the clients' needs and are able to view things from a perspective beyond their own programs and services. |
| | *Handbook of Employment Ontario Terms & References, CESBA* |

## Literacy Services Planning and Coordination Process

Perhaps the most important partnerships LBS programs have are those that happen through Literacy Services Planning and Coordination (LSPC). LBS programs should be as responsive to the needs of their individual communities as possible, yet they need to avoid duplication of services or confusion about services in their communities. They need to work out referral processes. This is accomplished through the LSPC process.

"The annual LBS funding cycle begins with the service providers in each community meeting to determine literacy services needs for the next fiscal year," LBS Service Provider Guidelines, October 2016. Bringing all the LBS service providers together annually to create a Literacy Service Plan (LSP), and regularly thereafter to review, evaluate and update the plan, determines:

> **"Literacy Services Plan** – Annual plans developed by Regional Networks that identify community literacy needs based on demographic and labour market information, including projections on number of learners to be served, service gaps, service improvements and services to be delivered."
>
> Glossary, LBS Service Provider Guidelines, October 2016

- if there are obvious gaps in service
- if there are overlaps in services
- which LBS agency will provide what services and to whom they should provide them
- how they will make referrals to each other (An LBS referral form from the Hamilton Literacy Council is included in the Sample Forms section of this chapter as an example of how LBS programs can refer among themselves in a service region.)

However, planning for LBS services in isolation from the rest of the community is not in keeping with the emphasis on seamless services. Because of this, the LSPC process goes beyond the literacy sector to bring other EO, adult education and community organizations to the planning table. By including those whose mandates complement LBS and who provide additional services, LBS learners can get the necessary supports and transitions.

> "Literacy and Basic Skills service providers plan literacy programming through the literacy services planning and coordination process. While this has served to develop coherence among LBS service providers, it is recognized that the focus for planning and coordination should extend beyond LBS service providers to those other organizations whose mandates complement LBS and who have the capacity to provide some of the additional supports needed." *Supporting Learners through Service Coordination and Referrals*, October 2011

The benefits of partnerships, which we talked about earlier, come into play as we extend our service planning to other LBS agencies and to the various community stakeholders. These other partners can provide different perspectives, identify different gaps, etc. to help develop and evaluate a Literacy Service Plan that better works with the community for the benefit of clients and learners.

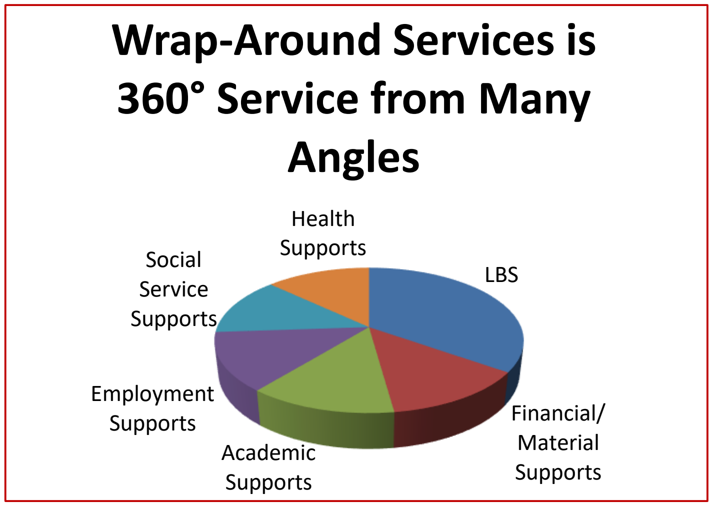
It is the responsibility of the regional networks to facilitate the LSPC process and complete the Literacy Services Plans.  For example

> **"Regional Networks** – Support organizations which are located around the province and which support all stream and sector LBS service providers, by facilitating a literacy services planning and coordination process in each community. They support LBS service providers to continuously improve their organizational capacity to deliver the LBS program. Regional networks work closely with stream, sector and service organizations to support the coordination and delivery of professional development opportunities in a community." Glossary, LBS Service Provider Guidelines, October 2016

- Metro Toronto Movement for Literacy (MTML) has developed the Embarking on a Collaborative Exploration of Adult Learner Pathways Tool which looks at the learning pathways of Anglophone-stream LBS learners whose mother tongue or primary language is not English. This research supports the Ontario learning ministries' priority of improving and validating learner pathways and strengthening the coordination between LBS programs and language training programs in Ontario (both non-credit and credit).

## Wrap-Around Services

Using wrap-around, pertaining to services, started in the 1980's to help youth with severe challenges stay in their homes. Since then, many different services have adopted the theory.




Case management is the key to making the wrap-around service delivery model work. Literacy learners often have multiple barriers. These barriers, combined with low skills, make it difficult for learners to know where to get help in their community. Working collaboratively among services to remove these other barriers allows learners to work on their learning goals.

> Wikipedia defines case management as the coordination of services on behalf of an individual person who may be considered a case in different settings such as health care, nursing, rehabilitation, social work, disability insurance, employment, and law.

# Outreach and Communication

For effective Information and Referral (I & R) service, you can't just sit back and hope clients will come. Outreach is the part of I & R that gets in touch with your community rather than waiting for the community to contact you. It is how you capture attention, in order to


- inform others about your Literacy and Basic Skills (LBS) services
- invite new clients to contact you
- get referrals from other service providers
- provide understanding of the Ontario Adult Literacy Curriculum Framework (OALCF) to those who provide the next step in the learners' goal paths (transition partners)

Outreach and communication activities can be varied. They can be aimed at different people and groups. However, your overall goal in outreach is providing more people with the literacy services and supports they need.

## Have a Strategy

For outreach to be efficient and effective you need a plan. Developing an outreach strategy takes work, but is well worth the effort. Unfortunately, there is no "one-size-fits-all" approach. The following steps can serve as a guide.

### Review

The first step to developing a new outreach strategy is analyzing what your organization has already tried. Asking the following questions may help with this evaluation.

- What outreach efforts (activities, campaigns, materials, etc.) have been done so far?
- Who did you target in previous activities (audience)?
- What worked?
- What didn't work?
- What partnerships have already been created or tried?

## Identify Goals and Outcomes

Once you have looked back on previous outreach activities and reflected on the degrees of success or failure, set the goals and outcomes for your new outreach campaign.

**Goals** should be unique to your agency and program. They should be general statements with a broad focus. Examples are: increasing your numbers of learners, gaining community recognition, raising awareness, changing perceptions, introducing new programming or encouraging employers to hire/help workers with literacy challenges.


**Outcomes** should be more specific and they should be measurable (for example, increasing learner numbers by 10% in the next fiscal year). Goals and outcomes may be tied to your LBS Business Plan, Literacy Services Planning and Coordination (LSPC) Plan or Quarterly Status and Adjustment Report (QSAR).

## Identify Target

Each audience has its own wants and needs, so they all should be approached in different ways. Identifying your target is important in sending the right message to the right audience.

### Learner Recruitment Targets

If you are looking for more learners, you might base your strategy on a group that you feel you are not currently reaching effectively, or a target group that MTCU has identified as the most in need of LBS services. Your target group may be described in one or more terms. For example, your target audiences might be single mothers under 30 years of age or 45 to 64-year-old men who are unemployed. Here are some other categories you might consider:

- gender
- age
- prior schooling
- race/ethnicity
- employment status
- source of income

### Other Targets

Not all of your targets will be potential learners. For example you may also want to get more volunteers. Some of your outreach and communication targets may not even be individuals, but rather other organizations or agencies. You may want to direct your attention to:

- referral partners – groups or services that might refer people to your program

- transition partners – organizations that provide the "next steps" along learners' goal paths, such as schools, colleges, training institutes or employers

By identifying your target, you can choose communication tools and customize messages according to the habits, needs and wants of the intended audience. In turn, you are more likely to get a reaction, response or change in behaviour from your outreach campaign.

### Research

An outreach strategy needs researching. Some of the things you should investigate are:

- **Clear understanding of target** – You need to consider why this target audience has not been responding sufficiently in the past. What barriers do they have that you need to address, such as stigma around literacy challenges, past failure or lack of funds? How can you make your message compelling? How does your target most often communicate and get information?

- **Community need** – What is going on with your community that affects your services? Consider your community as a whole and be aware of local trends. Statistically, is there a sufficient number of your target group? Are community demographics changing? Is there competition for the target audience's attention? Are there service gaps? Are the programs you offer relevant?

- **Resources** – What resources do you have in your organization to do outreach? This can include human resources, time, skills and finances. What resources are in your community for funding or assistance in getting your message(s) out? Partnerships can cut your costs and/or increase impact. A partner can provide advice, funding, technical expertise, access to your audience, etc.

- **Challenges** – Playing "devil's advocate" and exploring the challenges your outreach campaign may face is worthwhile. Do some problem solving and consider other options before you expend valuable resources on efforts that might not work.

### Develop and Carry Out Your Plan

Once you have completed all of the preliminary steps, creating the actual plan should not be difficult. Your plan should include:

- Budget
- Key Audience(s)
- Key Message(s)

- Method(s) of Distribution, such as:
    - Press Releases
    - Articles
    - Letters to the Editor
    - Social media
    - Press Conferences; Radio, Television or Press Interviews; and Media Tours
    - Spokespersons (successful learners, community leaders, celebrities, etc.)
    - Seminars or Speaking Engagements
    - Tables at events
- Intended Response
- Timelines

### Evaluate


One of the points in the MTCU Requirements, discussed in an earlier section, was: "Evaluate the effectiveness of the outreach strategy and activities and revise accordingly." At key points, as you implement and carry out your plan, you need to review it. Are you still on track for the timelines and budget? Are you still moving towards your intended goals and outcome objectives? What is working? What is not working and why? What has been achieved? Did you accomplish anything you didn't expect? What changes need to be made?

Following the above six steps (Review, Identify Goals and Outcomes, Identify Target, Research, Develop Plan and Evaluate) is just one way to create an Outreach Strategy. For more information on Outreach Planning, see CLO's Marketing 101 module and some of the Additional Resources at the end of this chapter.

## Delivering the Message

A critical part of your Outreach Plan is how to contact your target audience. Each audience may require a different means of communication. Meeting with other community service providers or sending an email to an Ontario Works caseworker are good ways to communicate with an audience, but contacting potential learners may be a different matter.

### Word of Mouth

Almost all LBS programs name word of mouth as the most successful way to reach learners. By this, we mean that new learners are often told about the program by a friend or family member.

Learners can spread the word and refer new learners to your program. Adult students are a wonderful inspiration to potential learners. Don't forget exiting learners as a potential method of outreach. The sole determinant of Customer Satisfaction, in the Customer Service dimension of the Service Quality Standard, is the response to one question:

> *"On a 1-5 scale, how likely are you to recommend the LBS Program to someone looking for similar services?"*

Just by asking this question, which we are required to do anyway, we put the "recommend someone" thought into learners' heads.

Word of mouth also includes family and friends sharing the need for literacy instruction and the availability of programs. ABC Life Literacy's "*Who Wants to Learn?*" research further confirmed the importance of family and friends when it found that 32% of potential learners heard about literacy programming from family and friends. As it is sometimes difficult to reach potential learners themselves, targeting this audience might be a strategy to consider.

Some ways learners can help to spread your message:

- Student newsletters
- Learner success stories
- As guest speakers and spokespersons
- Create student business cards for your agency
- Hold open houses that include learners
- Host student recognition events
- Include them in outreach presentations,

## Using Learner Stories for Outreach

Involving adult students in promoting your literacy program is extremely effective. Their "from-the-heart" testimonials on the impact of literacy on their lives move and inspire others. Whether through community presentations; quotes on your website, on FaceBook or in promotional materials; newspaper articles or radio public service announcements (PSA), be sure to include the voices of adult students.


Get learners' stories and experiences in writing. Then get their permission to publish or use their stories in your newsletter, on your website, in brochures and during community presentations. There are many examples of this throughout the Literacy and Basic Skills community. For instance, Tri-County Literacy Council's Testimonials webpage has written and audio-clip testimonials. However, they go a step further by inviting past learners to share their Tri-County Literacy Council experience by providing a testimonial (written article or recording), saying "You can make a difference in people's lives. What you have to say about the training you received, your teacher, or the agency may be the deciding factor in whether (a future learner) will contact us or not. Help them meet their goals and take advantage of this valuable FREE training." This allows the satisfied customer to feel empowered to give back to the organization that helped them and to help another person reach their goals.

There have also been a number of video testimonials recorded and available on YouTube. Try searching YouTube for Literacy and Basic Skills testimonials.

**Bonus:** There is a bonus to using learner stories in your outreach. Learners can improve their skills in the OALCF Competency B, Communicate Ideas and Information, while assisting you!

### Using the Media

Using the media can greatly improve your agency's visibility to the public. According to a CLO program survey, 84% of Ontario's community literacy agencies use the media extensively. Examples include writing a column, preparing special interest stories, public service announcements on the local radio station and learner testimonials. The media will often promote fundraising and promotional events such as spelling bees, scrabble tournaments and open houses. Toronto's "*Word on the Street*" is an excellent example of a promotional event that tends to get good media coverage.

### Printed Promotional Material

Creating a variety of printed material with compelling messages is very important. You can choose from a wide range of options, including pamphlets, brochures, newsletters, bookmarks, posters, business cards and calendars. Your printed material should provide basic, clear, eye-catching information that speaks to potential participants, because the time, money and effort pays off. In ABC Life Literacy's "*Who Wants to Learn?*" report, almost three-quarters of callers remembered seeing promotional information about adults going back to school. More than half of these say the information influenced them to call a literacy agency.

Although many programs have the capability to produce effective material in-house with today's software and printers, it can still be costly. To ensure you have some resources available, a distinct line for promotions should be in your budget. Sometimes, you can save money by using local services. For example, does your local college have a graphics design program? Perhaps college students could develop some promotional material for you free of charge as part of their studies. And be sure to ask your volunteers; they may have skills, talents and access to resources and connections that you don't.

### Promotional Products

By promotional products, a.k.a. swag, we mean useful items imprinted with a business name, logo or message that are intended as give-aways. These can be used to market a brand, product, event or service or to communicate a message. Some examples are shirts, caps, pens, calendars, notepads, bags, mugs, refrigerator magnets, keychains and water bottles. The cost of these products can add up, particularly the imprinting costs, so, are they worth it? According to a 2017 study, conducted by Promotional Products Association International (PPAI), the answer is yes. View PPAI's infographic The Modern Consumer in the Driver's Seat for some interesting facts and figures from the study.

- Roughly eight in 10 admit to looking up the brand after receiving a promotional product
- 83% said they are more likely to do business with brands they've received promotional products from than brands they have not received promotional products from.
- 8 in 10 consumers revealed that their impression of a brand positively changed directly as a result of receiving a promotional product from that brand.
- Promotional products were rated as the best advertising channel to provide consumers with an incentive to take action.
- Promotional products are the best received and least avoided form of advertising.

Mapping Out the Modern Consumer,
2017 Consumer Study, PPAI

For ideas on how to use promotional materials, read How Non-Profit Organizations Can Use Promotional Products by Tina Rinaudo or GuideStar's Blog How NOT To Waste Money on Branded Swag **b**y Courtney Cherico..

### Websites and Social Media

In today's world, the Internet is where most people go to find information. If used correctly, the Internet can be a powerful promotional tool for literacy agencies. Two main areas for outreach and communication involving the Internet are websites and social networking.

#### Websites

When looking at your website, consider the following questions:

- Is your website a good outreach and communication tool?
- How would you rate your website in terms of design, user-friendliness, overall appeal and ease of access to information? Do you update it regularly?
- Can learners, their friends and family and community stakeholders easily find out what they need from your website?
- What kind of impression of your organization do visitors get from your website?
- If you ask a few people from outside your organization to give you some honest feedback or ask current students to review and comment on your website, what will they say?

If you aren't sure about the answers to these questions or how to make the answers positive, there are some excellent blogs, articles and webinars on the Learning section of TechSoup Canada. We also recommend coyotecommunications.com's Basic Web Development & Maintenance for Nonprofits, NGOs, Government Offices & Other Mission-Based Organizations.

### Social Networking or Social Media

Social networking (also known as social media) is an economical way for non-profit organizations, including LBS programs, to market themselves. However it does take some dedicated staff time to "watch-over" and "feed".

It seems that just as social networking gives individuals the chance to keep in touch with relatives and friends, LBS agencies can form and support relationships with their stakeholders. And, as the "networking" name implies, those who are already linked, "liking" or "following" can share with others, thus increasing awareness and involvement.

Community Literacy of Ontario (CLO) has researched and developed a number of social media marketing resources. These publications, webinars and downloadable tools and templates can help LBS agencies to create effective marketing strategies and tools using media such as Twitter, Pinterest, LinkedIn, Facebook, YouTube and more. Several examples follow but check CLO's website for regular updates and more information.

- *FACEBOOK DEMYSTIFIED: How Facebook Can Super-charge Your Marketing* This webinar and accompanying pdf help you learn how to super-charge your LBS agency's Facebook Page taking it from "drab to fab". It covers best practices and tips and tricks to enhance your marketing and community engagement on Facebook. Then you can review the "Tips and Tools" PDF highlights that summarize the webinar.

- The *Art of the Tweet* webinar explores how to build an impactful profile on Twitter and how to create Tweets to promote your organization and engage your stakeholders

- *Put Your Best Facebook Forward* This webinar explores how to build an impactful profile on Facebook, and how to create posts to better promote your organization and engage your stakeholders. This is an intermediate webinar, designed for literacy organizations that already have a Facebook account but want to learn how to enhance how they use it.

- *Social Media Risk Management* In this webinar you will learn about social media risk management including how to safeguard your privacy, protect your online reputation and more in this webinar.

- Social Media Marketing Modules (2015): From Marketing 101 through Blogging, Facebook, Twitter, Instagram, LinkedIn, Pinterest, Videos and Webinars to Privacy and Security, these modules cover the basics of social marketing for LBS.

For some other tips on successful social networking, check out the article,

11 Ways to Grow Your Nonprofit Social Media Followers by Julia Campbell

### Clear Writing in Your Promotions

For all promotional tools, it is important to use the principles of clear language and design. Be sure to produce clear, well-written materials that are effectively desktop published. More graphics, fonts and features aren't necessarily better; simple is usually the best.

If you would like more information on clear writing, visit the Learning Networks of Ontario's website.

### Making Our Outreach and Communication Accessible

Under the Accessibility for Ontarians with Disabilities Act, Ontario organizations have to make their information accessible for people with disabilities. Check out the Ontario government's website to ensure that your agency is meeting the current requirements.

MTCU expects us to make our sites and materials accessible to Persons with Disabilities.

To find out more, the Ontario government's How to Make Information Accessible webpage offers:

- A summary of the law
- How organization can comply
- Types of accessible formats
- Types of communication supports
- Tools to make information accessible
- Links to other resources, such as, free training resources on accessibility requirements including the Information and Communications Standard, offered by Access Forward.

## One Last Note on Delivering the Message

One MTCU requirement for LBS agencies is to "Ensure their contact information and service descriptions are accurate and up to date on the web, social media and in any print materials they provide to customers or other EO service providers."

It is sometimes hard to remember to update information that is "out there." Whether it is on the Internet as social media or a webpage, or if it is print material like brochures, it is very important that we keep our information up-to-date. This is not only a part of your contractual obligations – it also ensures that clients are able to find you easily.

On a regular basis throughout the year, as stated in your contracts with MTCU, you need to check and update your information on the Find Employment and Training Services (FEATS) section of the Employment Ontario website. You can follow the 5 easy steps on Employment Ontario's webpage.

You should also update your Ontario 211 listing. Ontario 211 is a helpline and website for information and referral to community, social, government and health services. You can edit your listing through the telephone hotline (dial 211) or directly from your listing on their website.

It is a good idea to set yourself up a reminder method to ensure your progam's information is current and correct. Many programs check their listing on Employment Ontario at the same time that they review their monthly EOIS-CaMS reports. Try to maintain a list of publications, websites, etc. that need to be updated whenever changes occur at your agency and while making the updates, review and make any other corrections as needed.

## Getting the Message Right

Successful outreach and communication requires spreading the word in the right places and in the right ways to connect with potential learners. However, sending the right message is extremely important. We need to draw attention to **how our services can change people's lives**.

| | |
|---|---|
| For other service providers | ➔ how our program can increase their clients' success |
| For transition partners | ➔ how our program can sufficiently prepare learners for that next step along the goal path |
| For individuals | ➔ how our program focuses on them; what they can get from LBS training; and how it can make a difference in their lives |
| For the community | ➔ how prevalent literacy issues are; the impact of low-literacy on individuals, society and the economy; and how our LBS program(s) can and have made a difference |

People respond to marketing messages about something THEY want – not something WE think they need or want. If the message in our promotional strategies and materials is based on assumptions about what the target audience wants, the message may not be successful. Your message should always answer the **"What is in it for me?**" question of the intended audience.

### Message Tips

For more insight on getting the message right, you might read:

- *Literacy: Why it Matters 2018* This resource from CLO shares the many important reasons why  iteracy is a critical issue in Ontario and the importance of the Literacy and Basic Skills program. The information is a useful tool for LBS  program members, partners, community stakeholders, governments and the general public. It includes free, downloadable materials, logos, etc. that can be personalized for individual programs and communities.
- CLO's Literacy Basics module on Marketing
- Reaching Across the Barriers: Increasing Outreach and Participation in Family and Adult Literacy, a study by Kingston Literacy and Skills

### Slogans and Taglines

Creating a catchy tagline or slogan that will help people to remember your organization in a positive way can be a very useful promotional tool. Then, once you've got a good tagline, use it! Put it on everything … on your brochure, signage, letterhead, promotional materials and in your annual report. It could make all the difference with community recognition of your literacy agency.

Consider these taglines and think about their positive motivational appeal:

- "*Hamilton Reads!*" (Hamilton Literacy Council)
- "*Learning for a better future*" (Training and Learning Centre of Renfrew County)
- *"Building skills for tomorrow"* (Community Learning Alternatives)

**Taglines vs Slogans**

A **tagline** summarizes your organization's philosophy, purpose and values into a catchy phrase. It helps create awareness about your organization, separates it from competitors and shows your benefit to customers. Typically a tagline is short, such as Nike's "Just Do It." A company rarely changes its tagline, as it is part of its identity, and is used in most of its marketing.

A slogan is also short and catchy but it usually only represents a product, event or service. It is developed for a single marketing "campaign" and is thus replaced regularly.

### Message Content Help

National, provincial and regional literacy networks all have tools, statistics and learner stories to help you with your outreach messages. CLO, for example, has produced several "message" packages about literacy that can be found on its website:

- Literacy: Why it Matters
- Ontario's Community Literacy Agencies: Great Places to Learn!
- Ten Key Facts About Community Literacy Agencies

## Outreach Suggestions

Over the years, Community Literacy of Ontario has collected information on effective outreach strategies from a wide variety of sources, including CLO's provincial Board of Directors, participants in online workshops, Kingston Literacy's "Reaching Across the Barriers" and CLO's "*Learner Recruitment and Retention Toolkit.*" These strategies can be categorized into three groups: Advertising and Promotion, Programming and Networking.

### Advertising and Promotion

- When targeting specific groups of learners, use spokespersons from that group. Encourage them to use their own words and lingo for the script. Ensure promotional material that is aimed at people with very low reading skills has few words and uses mostly pictures.

- Put flyers or bookmarks about your program in grocery bags, in library books, etc. Put bookmarks, brochures, business cards, magnets, etc. into as many locations in your community as possible: doctor's offices, schools, libraries, community centers, playgroups, health units, legal aid offices, bus shelters, and malls. Use tear-off information sheets in laundromats, train and bus stations and fast food places.

- Conduct sidewalk surveys asking the public if they are familiar with your agency and its location, and if they would refer someone to it. Provide information about your program.

- Hold a coffee house, poetry reading, etc. Invite adults from the community to read their poetry or stories or have local musicians, singers or artists display their talents.

- Simplify program information and aim the message directly at the learner. Print up simple, clear and eye-catching messages and post them on community bulletin boards.

- Do seasonal promotions around Valentine's Day, Halloween, Mother's Day, etc. Target these to the family and friends of adults with low literacy skills.

- In outreach material, show the programming choices you provide (small group or one-to-one) and that there is flexibility in schedules (both days and evenings are available).

- Set up displays in the window of the local library, etc.

### Programming

- Offer special interest workshops or hold a drop-in night offering to help people complete forms free of charge, etc. This puts you in contact with people who might also like to improve their literacy skills.

- Use learning materials that are specifically directed at your target group(s). For example, use workforce materials with learners on the Employment goal path.

- Increase your exposure by delivering programming (assessments or training) onsite at Ontario Works, Employment Services, workplaces, etc.

- Direct contact is usually more effective than just sending a notice. When starting a new course, telephone people in the community (Employment Services, Ontario Works, Ontario Disability Support Program, social services, employers, etc.) and ask if they might have any referrals. Alternatively, send them an email with a flyer. Ask, “Do you know anyone who would benefit from this training?” or “Would you distribute these brochures to people who come into your business?”

### Networking

- Contact local temporary placement agencies. People coming to them for work may need to upgrade their skills before they can be employed.

- Approach professionals such as doctors, lawyers and religious leaders, who may meet people needing assistance of some type. Provide pamphlets or business cards that they can pass on to a potential learner.

- Make presentations to service providers so they know just what services LBS can provide.

- Make use of the adage “many heads are better than one” by getting ideas from program staff and from committees set up solely for the purpose of marketing and outreach. And, as we said earlier, don’t forget the learners. They can tell you a lot on the subject of what is inviting about your program and what encouraged them to come to your program. Ask where they heard about your program and track this information to target recruitment efforts in the most effective way.

### Reaching Diverse Cultural Groups

Sometimes it can be difficult to reach diverse cultural groups in your community. Programs should incorporate traditional knowledge, languages, stories and customs when designing course content and recruitment materials. Staff and volunteers must be sensitive to cultural differences and be aware of racism issues. It is also important to ensure that your literacy agency establishes links with organizations serving diverse cultural groups and for your staff and volunteers to reflect the diversity of the community you serve. An advisory group made up of representatives from various cultures can provide valuable advice on effective ways to link with their communities.

# Recording, Tracking and Evaluating

## Evaluating Your Information and Referral Activities and Services

So far in this chapter, we have included some evaluation tips for the various Information and Referral activities. Here we will discuss evaluation of this service in more general terms.

Evaluation measures progress or success. Knowing if your Information and Referral efforts are on track and getting positive results ensures that you are not wasting valuable resources on ineffective methods. Even though human and financial resources are tight, even though there are many other important things to do, don't skip this part. Because Literacy and Basic Skills programs have limited resources, it is even more important that they are only used for *effective* information and referral activities.

After doing information and referral activities, you need to look back and see how successful or productive they were. How else will you know that your outreach attempts:

- reached your target audience and made them respond?
- built strong collaborative partnerships?
- initiated referrals both to and from your program that were beneficial to clients/learners?

**Additional Benefits of Evaluation**

- Creates standards for success or a baseline to measure against over a period of time
- Helps your program grow and become more successful as lessons learned can be utilized to help strengthen it in the future
- Identifies duplication of efforts and strategies that work and don't work with your target audience
- Lends credibility to your organization, especially as you work to build partnerships
- Gives you a competitive edge as your organization competes for Federal grants or other funding

*US Department of Agriculture, Food and Nutrition Services, Supplemental Nutrition Assistance Program*

Evaluating your Information and Referral allows you to rate the success of your outreach, service coordination, needs determination and referral activities. Evaluation helps you:

- find out what is and isn't working
- identify gaps in your Information and Referral services
- use resources where they will provide the most benefit
- show MTCU and other stakeholders that your program is effective and coordinating well within the community

## Ways to Evaluate Information and Referral

People often refer to two different types of evaluation:


- **Formative**, which helps you to **improve** an ongoing plan or activity (person, product, program, etc.) Formative evaluation can be considered in two sub-categories (implementation and progress) depending on the stage in which it takes place. Some examples are:
    - Reviewing past program and community statistics to determine demographic groups which you are not serving sufficiently, to set target audiences (implementation).
    - Having someone review your flyer for mistakes before you circulate it. Their evaluation would allow you to correct mistakes and improve your flyer (progress).
    - Getting current learners to look over your marketing brochure to tell you what they like and dislike about it (progress).
    - Holding a focus group of past learners to find out what problems they had in transitioning to the next step in their goal path, so you can work with transition partners to alleviate those problems (implementation).

- **Summative**, which helps you to assess and prove if the results of the plan or activity (person, product, program, etc.) had an impact and/or met the set goals. These types of evaluation take place at the end of the plan or activity. They are often quantitative, such as:
    - The number of people responding to an ad, flyer or poster that was posted or circulated.
    - The number of people or organizations that attend an information session.
    - The increase in referrals received from a community partner after holding a meeting with them and establishing referral protocols.

We mention these two types of evaluations as, together, they provide you with evaluation strategies from the first steps in developing your Information and Referral strategies, throughout your campaign and beyond to determining the extent of each strategy's success.

Below are some types of tools that can help you evaluate your Information and Referral activities:

- Counts (statistics, responses, contacts, clients, learners, referrals, etc.)
- Observation (events, audience behaviour, service delivery)
- Social media likes or followers
- Website use analysis
- Case studies and learner success stories
- Media clipping/tracking
- Surveys and questionnaires (in-person, phone, online with clients, learners, partners, public, etc.)
- Key informant interviews (phone, in-person)
- Focus Groups
- Surveys (see the John Howard Society of Kawartha Lakes and Haliburton, Outreach Literacy's Community Partner Survey in the Sample Forms at the end of this chapter.

# Additional Resources

The following are some examples of tools and resources related to the Information and Referral Service that were of interest to LBS practitioners interviewed during the development of the Information and Referral module on CLO's Literacy Basics training website along with some new ones that we have researched since the launch of the service delivery training modules . This is not intended as an exhaustive list and we encourage you to explore the resources available on the Internet or through Ontario's literacy support organizations and regional literacy networks.

In CLO's most recent publication, we researched and wrote eight success stories on effective partnerships between Literacy and Basic Skills agencies and Ontario Works. From these stories, we created our "Partnership Success Stories: Literacy and Basic Skills Agencies and Ontario Works" newsletter. This newsletter will increase practitioners' knowledge and understanding of the many creative ways in which LBS agencies across the province are working with Ontario Works to provide support to adult learners.

CLO's **"***Recipes for Success: OW and ODSP Best Practices***"** – Almost 40% of adult learners in Ontario's LBS programs receive income through Ontario Works (OW) or the Ontario Disability Support Program (ODSP). We recognize these clients often have additional or more complex needs, and we want to help you meet them. In this 54-minute webinar, Summer Burton, of Literacy Link South Central presents resources to help you engage vulnerable OW and ODSP clients in LBS programming. The webinar will provide strategies to cultivate effective partnerships to support your OW and ODSP clients.

*Service Co-Ordination in Literacy and Basic Skills —Trials and Tribulations - Let's Talk* – Service co-ordination is a top priority for LBS agencies to help meet the varied needs of the learners in your programs. And based on the needs of individual learners and the make-up of your communities, service co-ordination can be very different from learner to learner, and from community to community. In this interactive one-hour webinar, CLO discussed challenges, successes and best practices related to this important function. Real-life examples were shared to showcase agency struggles and agency successes.

*Marketing Ourselves: A Resource for Ontario's Community Literacy Agencies (2008)* An oldie but still a goodie! This resource from Community Literacy of Ontario is a guide on marketing strategies that literacy organizations can use to improve outreach to adult learners, community stakeholders, partners, and referral organizations.

CLO regularly develops and publishes newsletters on topics of importance to LBS practitioners. Examples relative to the Information and Referral service include:

- Service Coordination Newsletter March 2017
- Marketing Newsletter - June 2016

*Approaches to Service Coordination* This report from the Ontario Literacy Coalition (Essential Skills Ontario) looks at how services among different providers might be coordinated so that learners will have access to the supports they require. It discusses four possible approaches to service coordination: case management; inter-agency cooperation; integrated programming; and community-wide planning. The study finds a consensus that a case management approach positively influences the success of harder-to-serve learners and those likely to benefit from additional supports.

*Tips for Success 2016 (Ontario Works and Ontario Disabilities Support Program in LBS Programs* In 2015-2016, through Tweet Chats, webinars and social media sharing, Community Literacy of Ontario collected information about effective resources, strategies, and partnerships to engage Ontario Works (OW) and Ontario Disability Support Program (ODSP) clients in Literacy and Basic Skills programming. This guide lists and annotates 40 helpful resources.

*EO Leadership Summit – Strengthening Connections between LBS and Employment Services Workshop* These presentation slides from a workshop provide many successful examples of partnering for the benefit of learners and programs. Some slides could also be copied for presentations to potential partners.

*Toolkit of Resources to Support Service Delivery for Hard-to-Serve Clients in LBS Agencies* This kit from CLO is full of resources, tips and sample tools gathered from many LBS practitioners who have found them helpful when delivering services to clients facing a multitude of challenges. Consider adapting and using the sample tools to make them work to your clients' advantage.

The Learning Networks of Ontario (LNO) is made up of 16 learning networks from across Ontario. On their joint webpage, there are numerous resources that have been developed to assist Ontario's LBS community. Two sections in the *Resources* drop-down menu that are worth checking out are *Marketing* and *Resources for Community Partners* with a variety of tools to help with your Information and Referral process. Some pertinent example publications include:

- *2016 – 2017 LBS & ES Blended Programming Guide*, Literacy Network Northeast (LNN), Literacy Northwest (LNW) and Mid North Network for the Coordination and Development of Adult Learning (MNN). While the "blended programming partnerships" shared in this report include examples of those amongst Employment Ontario programs (LBS and Employment Services), they also extend to other key community stakeholders.

- *Formalizing Transitions between Employment Services and LBS* – Simcoe/Muskoka Literacy Network, 2014**.** This project researched the ways in which ES and LBS programs have worked together to promote transitions from ES to LBS and from LBS to ES. The research includes best practices, screening tools, awareness raising workshops, how EOIS CaMS reports can be used, and how to integrate transition documentation into Literacy Service Planning.

- ***Creating Pathways of Learning Support for Employment Ontario Clients with Learning Disabilities***, Metro Toronto Movement for Literacy (MTML), 2014. The project publications and tools provide information on existing services and recommended tools to provide support and accommodation to EO clients with learning disabilities, including a toolkit for literacy practitioners and front-line social service providers, a Literacy Screening Tool (English and French) (2015) to help referral partners identify clients who could benefit from LBS upgrading and a website.

- The website, OK Learn, provides information and assessment guides to help partners identify the various learning pathways and transitions that their client might need. These web resources include about English as a Second Language (ESL) and Language Instruction for Newcomers (LINC) programs.

- ***Assessment and Training Referral Guide for Northwestern Ontario Employment Ontario Service Delivery Partners***, Literacy Northwest, 2012. This presentation style guide/toolkit was developed to provide Employment Ontario (EO) service providers with tools and information needed to identify if clients are academically prepared to reach their goals and to make appropriate referrals within the EO network and/or community at large. Although created for Northwestern EO partners, information is transferable throughout the province.

- *Literacy and Essential Skills Awareness Guide*, Literacy Ontario Central South (LOCS), Ottawa Community Coalition for Literacy (OCCL) and Literacy Link Eastern Ontario (LLEO), 2009

*Capacity Builders' Collaboration Coach* is a website created to help nonprofit boards, staff and volunteers build and nurture effective collaborations. The site offers access to practical tools and examples of collaboration for sharing information, building partnerships, integrating services and forming alliances.

TechsoupCanada.ca has a wealth of information to help with your web and social media presence in their "Learn" section. There are numerous blogs and live and recorded webinars available. For example:

- *Digital Storytelling: Understanding Social Media and Visual Storytelling Tools for Nonprofits.* This recorded webinar looks at using visuals, videos, and live stories to better tell your organization's story. It shows you how some nonprofits are using social media platforms for digital storytelling, with examples of successful campaigns on Facebook, Twitter, Instagram, and Snapchat.

- *Google Ads: How To Increase Your Nonprofit's Presence Online With $10,000 Per Month Of Free Ads* This webinar is for beginners looking to learn how to access and use the main features of Google Ads to grow their online presence.

# Sample Forms

## Sample 1 – Screening Questions Interview Form

| Screening Questions Interview Form<br>Waterloo Region and Wellington County |
|---|

| | |
|---|---|
| Date: | Client/Learner Name: |
| Address: | Telephone:<br>Email: |
| 1. Can you please tell me why you are here today? or What brings you here today? | |
| 2. Why have you chosen this agency? | |
| 3. What program are you looking for? | |
| 4. Describe your current situation or "Tell me what is happening in your life right now?" | |
| 5. Can you tell me about the programs or services that you are accessing now or that you have accessed in the past? | |
| 6. Optional Questions – Are you comfortable communicating in English? | |
| 7. Have you had difficulties in school? | |
| Additional Information:<br><br>Pathway: | |

## Sample 2 – Eligibility and Suitability Form

| Iroquois Falls Adult Learning Centre | | |
|---|---|---|
| **OFFICE USE ONLY** | Section B3.2 Proficiency? ☐ Y ☐ N | **Client referred to:** |
| Comments: | | |

| Days and times client is available for training | | | | |
|---|---|---|---|---|
| Monday | Tuesday | Wednesday | Thursday | Friday |
| | | | | |

| | **Indicators for Eligibility Criteria** |
|---|---|
| | An Ontario resident |
| | Assessed at intake as being less than OALCF Level 3 |
| | 19 years of age or older |
| | Speaking and Listening proficiency good enough to benefit from LBS (CLB level 6) |
| | History of interrupted primary & secondary education |
| | Self-identified as defined by AODA and OHRC definition |
| | Indian (status or non-status) Inuit and Metis |
| | |

| | **Indicators for Suitability Criteria** | |
|---|---|---|
| | **Education** | Less than grade 12 |
| | **Source of Income** | OW, ODSP, No income, Crown Ward |
| | **Time out of training** | 6 years or more |
| | **Age** | 45 to 65 |
| | **Interrupted education** | History of interrupted primary & secondary education |
| | **Person with Disability** | Self-identified as defined by the AODA and OHRC definition* |
| | **Aboriginal Person** | Indian (status or non-status) Inuit and Metis |
| | **Deaf** | Self-identified as Deaf |
| | **Deaf / Blind** | Self-identified as Deaf / Blind |
| | **Francophone** | First language spoken at home is French |
| | | |

**AODA = Accessibility for Ontarians with Disability**

**OHRC = Ontario Human Rights Code**

## Sample 3 – Referral for Service Form

Build Your Skills
Shape Your Future
Kingston Literacy & Skills

**Kingston Literacy & Skills, Napanee and Career Edge**



**Staff Contact: Amanda Morrison**

**Email: amorrison@klsread.ca**

**Phone:** 613- 547-2012

**Career Edge Phone**: 613-354-0425

**Fax:**

**Employment Service Agency Referring**: ____________________________________________

**Staff Name:** ______________________________ **Position:** ___________________________

**Phone:** _______________________________ **Email:** ___________________________

**Client Name:** ________________________________________________________

First Name | Middle Initial | Last Name

**Client's contact information:** Phone: (Home) _________________ (Cell) _________________

E-mail:

**Attachments?** Yes ☐ No ☐

Please list attachments:

**Additional Notes**:

**Consent for Release of Information (required):**

I, ______________________________, agree to have this form and any attachments noted above

Client Name (printed)

sent to Kingston Literacy & Skills, Napanee.

____________________________________ ______________________________________

Client Signature Date

____________________________________ ______________________________________

Staff Signature Date

**Additional Information for Referral** **Page 2 of 2**

- ❑ Client is <u>not</u> seeking high school credit training at this stage.
- ❑ Client has clear, specific and achievable goals they want to address through training.
- ❑ Client has the self-management skills and commitment to consistently attend training.

**Goal Path (one only please):**

❑ Apprenticeship ❑ Employment ❑ Independence

❑ Post Secondary ❑ Secondary

**Courses of Interest:**

❑ English ❑ Math ❑ Computers*

- ❑ Occupational Curriculum (skill enhancement related to specific employment fields, like Personal Support Work, Cashier/Retail, Skilled Trades, Security)**

** KL&S provides computer training to students who are taking other courses. We do not provide computer training on its own.

# Sample 4 – Client Referral Form

**Hamilton Literacy Council**

**Date:**

**Client Information**:

Client's Name: Email:

Address:

Telephone # Second Contact #

❑ Client has given their permission to share their personal information.

**Referring Agency (from):**

Contact Name: Email:

Agency: Telephone #:

**Reason for Referral**:

- ❑ Upgrading to Support Employment Goal
- ❑ Upgrading to Support Education & Training Goal (credit, post-sec, apprenticeship, etc.)
- ❑ Literacy Assessment of Ontario Works Client
- ❑ Assessment of Educational and Essential Skill Levels
- ❑ Other (please explain):

**Referring to:**

Agency: Telephone:

Contact Name: Email:

**Other Information**:

Please include any other information that may assist to support the client:

**Follow-up Requested**:

- ❑ Please let me know when the client makes contact
- ❑ Please contact me with the actions taken as a result of the referral
- ❑ No need for follow-up contact

**<u>Milestones completed as per Interagency Protocol Document</u>:**

| St. Charles | | |
|---|---|---|
| #27 B3.1A | Successful | ❑ |
| #54 D.1 | Successful | ❑ |
| #57 E.1 | Successful | ❑ |

| HWDSB | | |
|---|---|---|
| #4 A1.2 | Successful | ❑ |
| #23 B2.2 | Successful | ❑ |

| Mohawk | | |
|---|---|---|
| #4 A1.2 | Successful | ❑ |
| #12 A2.3 | Successful | ❑ |
| #58 E.2 | Successful | ❑ |

## Sample 5 – Partnering Policy

**Community Literacy of Ontario**

**CLO's Partnering Policy**

***Advisory groups, reference groups and task forces***

- CLO clearly distinguishes between *Partnerships* (in which CLO has formal obligations, roles and responsibilities) and *Advisory groups, reference groups, task forces, etc.*
- When CLO participates in advisory groups, reference groups, task forces, etc. there are no formal obligations placed on our organization. We are there only to give advice and feedback. CLO board and staff participate in advisory groups, reference groups, task forces, etc. based on their capacity to participate and the needs of our sector. No formal agreements or board permission are necessary to participate in advisory groups, reference groups, task forces, etc. since CLO is not formally bound nor does it have any legal obligations based upon its participation.

***Partnerships***

- Because partnerships place formal obligations and risks upon CLO, CLO enters into partnerships only if the conditions in this policy are met and the partnership fits CLO's mission.
- CLO will not consider entering into partnerships without a formal business plan or a project proposal being prepared by the organization requesting a partnership with CLO.
- This documentation must be sent to CLO staff at least two weeks prior to a full CLO board meeting and must include information on the roles, responsibilities, goals, timeframes, project finances, financial compensation for CLO, project management strategy, staffing plans, etc.
- CLO will not enter into any partnerships if the project's goals do not clearly fit with our mission statement and business plan.
- CLO will not enter into any partnerships unless it has both the board and staff capacity to effectively participate in the partnership.
- The organization requesting the partnership must develop a formal draft partnership agreement that clearly spells out roles, responsibilities, timelines, communication process, staffing and finances. CLO will review and amend this agreement as appropriate and both organizations will formally sign this document before any partnership begins.

- High level communication is critical to the success of any partnership. The partner requesting the partnership must develop a plan for how it will share information with CLO for the duration of the partnership. This plan must be reviewed and approved by CLO.
- The organization requesting the partnership must have a sound track record in project management and organizational management.
- CLO's *"Partnership Checklist"* will be filled out by CLO staff. If the risk is deemed to be low by staff after filling out the checklist, they may proceed with the partnership with board approval. However, if there is a low to high degree of risk (financial, reputation, capacity, etc.), then board approval would be needed.
- The partnering organization will provide CLO staff with update reports at mutually agreed upon timeframes.
- If a partnership is deemed to be failing, the partnership agreement will be mutually reviewed to determine whether the principles are being adhered to. Based on this review, CLO board and staff will decide what action to take (remedial action or discontinue the partnership).
- The CLO board retains the right to dissolve a partnership if a partner is not adhering to the partnership agreement.

## Sample 6 – Partnership Checklist

| Community Literacy of Ontario |
|---|

| | |
|---|---|
| 1. Has a formal business plan or project proposal been prepared by the organization requesting a partnership and shared with CLO? | |
| 2. Based on this business plan or project proposal, does CLO see an appropriate, manageable and beneficial partnership role for our organization? | |
| 3. Does the proposed initiative clearly fit with CLO's mission, business plan and goals? | |
| 4. Will a partnership provide significant benefits to both CLO and to our sector? | |
| 5. Has a draft partnership agreement been prepared by the organization requesting the partnership? Does CLO approve of the terms and conditions of the partnership agreement? | |
| 6. Has CLO's proposed role in the partnership been clearly articulated in writing? Are we comfortable with that role? | |
| 7. Does CLO have the board and staff capacity and any other required resources to fulfill our proposed role in the partnership? | |
| 8. Will CLO's involvement in the proposed initiative maintain CLO's excellent reputation in the literacy field? | |
| 9. Does a high level of organizational trust exist between CLO and any proposed partners? | |
| 10. Will CLO receive adequate compensation for its role / work in the partnership? | |
| 11. Do the proposed partners have complementary visions, missions and priorities? | |

| | |
|---|---|
| 12. Does the proposed partner have a sound track record in managing their organization? Is there clear evidence that the organization has the capacity to carry out this project / initiative? | |
| 13. CLO has a high standard for ongoing communication: internally, with the literacy field, with the funder and between any partners. Does the proposed partner have a communication plan for their project that is agreeable to CLO? Does the proposed partner have a strong track record in effective communication? | |
| Overall assessment and recommendation: | |
| Name of person filling out this form: | |
| Date: | |
| Areas of significant concern and action (if any) that can be taken to correct the concerns: | |
| Is this a low-to-high risk partnership that needs to go to the board for formal approval? | |
| Recommendation on proceeding with this proposed partnership:<br><br>Yes: ______No: ______ | |
| Additional comments: | |

## Sample 7 – Community Partner Survey

| John Howard Society of Kawartha Lakes and Haliburton Outreach Literacy |
|---|

As part of our program evaluation, I'd really appreciate you completing the following brief survey by________________________. Please circle your responses.

**1. I understand that Outreach Literacy is funded by the Ministry of Training, Colleges & Universities as a community-based upgrading program to provide 1:1 tutoring and small group training for adults.**

| 1 | 2 | 3 | 4 | 5 | 0 |
|---|---|---|---|---|---|
| Strongly Disagree | Disagree | Do not Agree or Disagree | Agree | Strongly Agree | No Answer |

**2. I appreciate that learners may be enrolled in more than one upgrading program at a time.**

| 1 | 2 | 3 | 4 | 5 | 0 |
|---|---|---|---|---|---|
| Strongly Disagree | Disagree | Do not Agree or Disagree | Agree | Strongly Agree | No Answer |

**3. I find some clients reluctant to participate in 'literacy' training.**

| 1 | 2 | 3 | 4 | 5 | 0 |
|---|---|---|---|---|---|
| Strongly Disagree | Disagree | Do not Agree or Disagree | Agree | Strongly Agree | No Answer |

**4. I know that Outreach Literacy offers employment focused training options.**

| 1 | 2 | 3 | 4 | 5 | 0 |
|---|---|---|---|---|---|
| Strongly Disagree | Disagree | Do not Agree or Disagree | Agree | Strongly Agree | No Answer |

**5. I have found program staff responsive to client referrals.**

| 1 | 2 | 3 | 4 | 5 | 0 |
|---|---|---|---|---|---|
| Strongly Disagree | Disagree | Do not Agree or Disagree | Agree | Strongly Agree | No Answer |

**6. I feel confident referring clients to Outreach Literacy for an assessment and/or training.**

| 1 | 2 | 3 | 4 | 5 | 0 |
|---|---|---|---|---|---|
| Strongly Disagree | Disagree | Do not Agree or Disagree | Agree | Strongly Agree | No Answer |

**7. Overall I am satisfied with my experience as a community partner with the Program.**

| 1 | 2 | 3 | 4 | 5 | 0 |
|---|---|---|---|---|---|
| Strongly Disagree | Disagree | Do not Agree or Disagree | Agree | Strongly Agree | No Answer |

**Comments:**

**Date: ____________________**

***Thank you for taking the time to complete this survey.***