CONTINUOUS IMPROVEMENT OF SARCA SERVICES

Reception, Referral, Counselling and Support Services (SARCA)

Reference Document

Québec 🟦🟦

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INTRODUCTION

This guide, entitled *Continuous Improvement of SARCA Services* focuses on the quality of reception, referral, counselling and support services (SARCA). It is intended above all for school board authorities who are responsible for managing SARCA services, as well as for all SARCA staff members. It proposes elements to be analyzed in order to establish an operational profile of SARCA services and facilitates the collection of data related to SARCA operations and the services offered to the target populations identified in the *Government Policy on Adult Education and Continuing Education and Training*.

Designed primarily as a management tool for monitoring the implementation of services, this document provides those responsible with the information and means necessary to make informed decisions concerning the measures required to improve services in order to achieve the expected outcomes established by their school board's strategic plan. It can also be used by school boards to fulfill their accountability responsibilities to the population of their territory, as described in sections 110.3.1, 207.1, 209.1 and 209.2 of the *Education Act.*

The first part of the document describes the context underlying its development. The second part explains the different components of SARCA and how they are evaluated, the concept of continuous improvement and the development and consolidation of SARCA services. The third part describes the components adopted as part of the strategy for the continuous improvement of SARCA services. An example of an operational plan is presented in the appendix.

In short, this guide invites school board authorities and all SARCA staff members, both in adult general education and in vocational training, to engage in structured reflection, dialogue, evaluation and assessment of the quality of SARCA services with a view to their continuous improvement and the equitable provision of services throughout Québec.

1. THE CONTEXT

All school boards are responsible for providing reception, referral, counselling and support services (SARCA). These services are described in *Reception, Referral, Counselling and Support Services: General Framework* (2006). Their purpose is to raise the level of basic education of adults in Québec, and they are provided to adults whether they are enrolled in general education or vocational training or are not enrolled in any program.

SARCA staff members focus their efforts on the adult, and support adults in the expression, development and implementation of a meaningful education, training and career plan.

SARCA's areas of activity include the following:

- helping adults acquire a more complete understanding of themselves, their resources and their potential

- helping adults gather appropriate information about their environment

- helping adults develop their capacity to identify their personal goals and to set appropriate objectives

- encouraging adults to set goals and develop action plans to achieve them

- providing adults with the assistance they need to achieve their goals

- taking a proactive approach in the adults' community

- working in partnership

The adults who use SARCA services are sometimes disadvantaged and do not have an education, training or career plan. Others are questioning the feasibility of their current course of action. These adults require information, assistance, counselling and support adapted to their situation, and these services must be provided with the utmost respect and active listening. These objectives are based on three fundamental values: respect for the adult, and equity and quality of services. Every SARCA intervention reflects these values.

These elements provide a conceptual framework for a results-based management perspective on SARCA services for the principal stakeholders, i.e. the Ministère de l'Éducation, du Loisir et du Sport (MELS), school boards, SARCA staff, colleagues within the school board, partners and the adults themselves.

Consequently, even if the organization of SARCA services may differ from one school board to another, it is important to establish orientations in order to provide equitable, high-quality services to all adults in Québec.

2. THE COMPONENTS OF SARCA

The various components described in this document include a set of variables representative of the management and operation of SARCA services. They reflect a vision of the optimal conditions for delivery of SARCA services to adults. They provide SARCA and staff with:

- the means to initiate dialogue and sustain reflection among SARCA staff members on their objectives, current practices and accomplishments, thereby improving coherence and effectiveness in their work with adults

- the means to report on the status of their services to various individuals or groups: colleagues, adults, school board authorities, communities, partners

- the means to monitor and analyze effective practices throughout the province and a common terminology for school boards to use

- the means to collect evidence of excellence and identify less effective or missing aspects of their services

- the information needed to continuously improve their services

2.1 COMPONENTS OF SARCA SERVICES

Summary Table of the Components

<table>
<tr><td colspan="2">DESCRIPTION

Guidelines for the optimal delivery of SARCA services</td></tr>
<tr><td colspan="2">STRATEGIES OR MEANS

Ways to operationalize the component

Statements of quality criteria</td></tr>
<tr><td>TARGETS OR EXPECTED OUTCOMES

Information on objectives or goals to be attained, in accordance with the component</td><td>INDICATORS

Information on the strategies or means related to the component</td></tr>
</table>

Description

The description corresponds to SARCA's objectives. It defines certain key concepts and contextualizes the strategies and means that may be used to ensure quality service.

Strategies or means

The quality of SARCA services depends on the existence of strategies and means. These are the factors that permit the attainment of the objectives or the optimal delivery of SARCA services. They include:

- material and physical resources (e.g. an information brochure, a wheelchair access ramp)

- processes or activities (e.g. regular meetings, feedback from stakeholders)

- states or conditions (e.g. welcoming environment, posted service hours)

Data used for analysis

The data are the bases on which a judgment can be made as to whether or not the desired level of quality has been achieved. Two categories of data are presented: targets or expected outcomes and indicators. School boards are encouraged to add other targets, outcomes or indicators in order to cover factors that may be specific to their situation.

Targets or expected outcomes

The targets or expected outcomes represent objectives or goals to be attained, for example the number of people reached by a partner organization or the presentation of an annual plan. Targets may also specify a percentage for the attainment of the objective, for example: 50% of staff members will be trained within six months. In this example, the indicator is the actual percentage of staff members who are trained within the reference period.

Indicators

In general, the indicators are used for planning and programming, for the assessment of results, resources and progress in implementation, for the analysis of the context and for evaluation purposes. They serve as evidence and they also represent a relationship between a numerator and a denominator—for example, a percentage or an annual average.

According to the literature on the subject, a good indicator satisfies the five criteria presented in the table below:

Criterion	Definition	Example: Target population's level of satisfaction with an activity held by SARCA
Validity	It must be related to the phenomenon observed.	A survey is carried out among adults who participated in the activity.
Reproducibility	The same outcome must be obtained when measurements are repeated within a short period of time.	The survey is unequivocal that the same outcome is obtained when measurements are repeated within a short period of time, under the same conditions.
Reliability	The data collected come from reliable information systems.	The survey questions are directly related to the focuses of measurement, such as the premises or the facilitation of the activity.
Sensitivity	The indicator can show changes occurring in the situation observed over time.	The survey questions are precise and diversified enough to permit the identification of improvements required by an activity.
Accessibility	The data required to develop or use an indicator are available.	The adults who participated in the activity are available to participate in the survey.

The interpretation of an indicator requires points of comparison and of reference. For example, it is important to compare the real situation with the desired situation or with the situation observed previously.

The indicators defined for each component provide evidence and make it possible to verify whether or not the planned actions were carried out. They can demonstrate whether or not the strategies and the measures adopted to help staff improve services were taken into account. They can also provide information on the degree to which an objective has been attained, and suggest the remedial action to be taken, if necessary.

2.2 FOLLOWING UP ON ACTIVITIES AND ASSESSING ACHIEVEMENT OF THE TARGETED QUALITY LEVEL

Once the data has been gathered, it can be related to the indicators, targets or expected outcomes to determine whether or not the desired level of quality has been attained. It provides the basis for ongoing reflection on current objectives and practices and the results obtained. It allows SARCA management and staff to make a structured assessment of the quality of their services.

Various sources of information may contribute to the evaluation process, including:

- feedback from staff, which makes it possible to gather information from all the people who provide SARCA services

- feedback from adults, which highlights opinions and viewpoints concerning their experiences with SARCA services

- feedback from partners, which highlights opinions and viewpoints concerning the services provided by the school board and agreements established or cooperative actions taken by different partners

Examples:

- Satisfaction surveys, discussion groups, interviews on the services provided, focused on adults and partners

- Satisfaction surveys or discussions among SARCA staff members concerning the organization and quality of the services provided, the quality of the facilities and the equipment available and the management of the adults' files

Other sources of information may also be used, including:

- the registers or the information system of SARCA services

- socioeconomic data on the population (from censuses or surveys)

- analytical reports on surveys or other forms of data collection (questionnaires, individual interviews or discussion groups)

- a management dashboard

- reports or annual reviews of the services provided

2.3   CONTINUOUS IMPROVEMENT: DEVELOPING AND CONSOLIDATING SARCA SERVICES

Once the information has been gathered, all SARCA management and staff analyze it, discuss it and propose actions to improve services. They may decide whether or not to continue certain practices.

For example, the staff might decide to replace ineffective processes and organize professional development activities to ensure the continuous improvement of existing services.

The analysis and interpretation of the data can be used to report on the status of services to various individuals or groups, such as colleagues, adults, school board authorities, communities, partners. This analysis may provide the basis for an assessment and an improvement plan.

In short, the elements analyzed can provide a clear picture of the existing services and make it possible to establish planning for continuous improvement. An example of an operational plan is presented in the appendix.

3. PRESENTATION OF THE COMPONENTS OF SARCA SERVICES

Components related to administrative activities

    3.1   SARCA Statement of Service
    3.2   Management of Services
    3.3   Management of the Adult's File
    3.4 Competencies of Staff Members

Components related to the delivery of each service

    3.5 Reception
        3.5.1   First-level reception services
        3.5.2   Second-level reception services
    3.6 Information
    3.7 The Exploration of Prior Learning
    3.8 Career and Guidance Counselling
    3.9 Support

Components related to general responsibilities

    3.10 Proactive Approach
    3.11 Partnership

The tables below present each component, with the strategies or means for ensuring its implementation. The tables also provide examples of data to be collected in order to measure the attainment of the targeted objectives.

3.1 SARCA STATEMENT OF SERVICE

DESCRIPTION
Information on SARCA (services provided, mission and mode of operation) is updated and sent to current and potential users, to school board staff and to partners who might refer adults to SARCA services.

STRATEGIES OR MEANS

<table>
<tr><td rowspan="1" style="writing-mode:vertical">DETAILS OF THE STANDARD</td><td>

1. A communication plan concerning SARCA is established.
2. Promotional materials on SARCA include the following:
   - a description of the services offered, including those available at a distance
   - the individuals or organizations who might benefit from the services offered
   - eligibility criteria
   - contact information
   - the languages used
   - service hours
   - the nature and formats of the available information (print, large print, Braille, adapted systems for hearing impaired users, video, electronic, Internet access, etc.)
3. The declaration of services includes the following:
   - the values of SARCA (e.g. equity in the provision of services, professionnalism and respect)
   - a statement of the school board's code of ethics with respect to storing, retrieving and sharing personal or confidential information
   - procedures for user evaluation of services and the use of this information for the continuous improvement of services
4. Promotional materials on SARCA and the declaration of services are prominently displayed.
5. Information about SARCA is clear and easily understood by the target population.
6. The declaration of services and the promotional tools are updated periodically.

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EXAMPLES OF DATA USED FOR ANALYSIS	
EXAMPLES OF TARGETS OR EXPECTED OUTCOMES	**EXAMPLES OF INDICATORS**
- Establishment of a communication plan - Existence of a declaration of services - Existence of promotional tools - Distribution and availability of promotional tools within the community - Updating of the declaration of services every x years - Updating of the promotional tools every x years	- Rate of referrals to SARCA by partners - Level of demand for services - Regularity with which promotional tools are updated

3.2   MANAGEMENT OF SERVICES

DESCRIPTION
The management of human, financial and material resources and the administrative procedures used enable SARCA to provide high-quality services to the target population.

STRATEGIES OR MEANS

<table>
<tr><td rowspan="1" style="writing-mode:vertical-lr">DETAILS OF THE STANDARD</td><td>

1. The administrative rules governing the services are presented to SARCA staff members.
2. An initial and continuing staff training plan ensures the quality of SARCA services, including:
   - SARCA's role
   - the client-based approach (roles and fields of intervention)
   - reception procedures, monitoring and support mechanisms
   - evaluation of the adults' needs (diversified client base)
3. Human resources are managed in a way that promotes staff involvement and commitment to a high quality of services, including:
   - periodic reviews of staff members' roles and responsibilities
4. SARCA services are financed in a way that ensures the quality and the implementation of the services.
5. The physical facilities make it easier to implement and run SARCA services.
6. The premises are accessible to all the adults served by the school board, the climate is conducive to discussion and confidentiality is respected.
7. Computer and documentary resources are available to the adults.
8. A policy for dealing with complaints has been established.
9. A process for regulating services (evaluation, updating and communicating outcomes) has been established.

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</table>

EXAMPLES OF DATA USED FOR ANALYSIS	
EXAMPLES OF TARGETS OR EXPECTED OUTCOMES	**EXAMPLES OF INDICATORS**
- Establishment of an initial and continuing staff education plan - Annual planning of SARCA services (activities, schedule, human and financial resources, etc.) - Administrative guidelines for dealing with complaints - Monitoring process for services, facilities and equipment - Reference documents for staff - Review of complaints addressed	- Satisfaction level of SARCA staff members - Satisfaction level of adults regarding services provided - Percentage of staff members receiving training in their first year - Incidence of complaints

3.3   MANAGEMENT OF THE ADULT'S FILE

DESCRIPTION
In the management of the adult's file, care must be taken to ensure that the information recorded is complete and accessible and that the Act *respecting access to documents held by public bodies and the protection of personal information* is respected.

STRATEGIES OR MEANS	

DETAILS OF THE STANDARD	1. An information system is established to record, store and process information on the adult's course of action.
	 2. The adult's file:
	   ▪ contains the supporting documents required to serve as proof if needed
	   ▪ records the activities carried out by the adult, their results, the decisions made and the remaining steps
	   ▪ can be accessed by authorized staff members and by the adult, who can receive copies of all relevant documents
	 3. A supervisory system ensures that the rules and procedures for accessing, storing, retrieving and sharing private and confidential information are respected.
	 4. The adult is referred to other services or partners in accordance with the school board's operating rules.

EXAMPLES OF DATA USED FOR ANALYSIS	
EXAMPLES OF TARGETS OR EXPECTED OUTCOMES	**EXAMPLES OF INDICATORS**
Existence of administrative guidelines for: ▪ accessing personal information and ensuring its security and confidentiality ▪ ensuring the accuracy, relevance, accessibility, updating and storage of information	▪ Rate of conformity of the files, in case they are verified ▪ Satisfaction level of SARCA staff regarding access to and content of files

3.4 COMPETENCIES OF STAFF MEMBERS

DESCRIPTION
SARCA staff members have the ability to encourage adults to adopt a course of action and to support them in developing and implementing a meaningful career or learning plan.

STRATEGIES OR MEANS	

DETAILS OF THE STANDARD	SARCA staff members:
	
	- adapt their role to the different needs and characteristics of the populations served by the school board and intervene in their best interests, based on:
	   - a periodic update of their knowledge of these populations
	   - the participation of staff members in the evaluation of the adults' training needs
	- take into account each adult's situation
	- make a real effort to relate to each person
	- motivate the adults
	- help the adults make decisions and develop their ability to participate in the decision-making process
	- provide adults with the documents concerning their learning process and their results
	- help adults develop generic skills (work and research methods, time management, etc.)
	- recognize the limits of their role and refer adults to other services, if necessary, explaining the reasons for the referral and the procedure to follow, if appropriate
	- observe the applicable rules, codes and standards

EXAMPLES OF DATA USED FOR ANALYSIS	
EXAMPLES OF TARGETS OR EXPECTED OUTCOMES	**EXAMPLES OF INDICATORS**
- Staff members' knowledge of the characteristics and needs of the target populations - Knowledge of rules, codes, etc. - Knowledge of training programs and the job market	- Satisfaction level of adults regarding staff members - Satisfaction level of adults regarding the services received - Satisfaction level of staff members regarding the services provided

3.5 RECEPTION

3.5.1   FIRST-LEVEL RECEPTION SERVICES

DESCRIPTION
Staff members responsible for first-level reception establish effective communication with adults, encouraging and facilitating the expression of their request for services. They treat this request in terms of the needs expressed or perceived.

STRATEGIES OR MEANS	
DETAILS OF THE STANDARD	1. Staff members are welcoming. 2. Staff members use effective means and strategies of communication that are adapted to the situation of each adult (specific needs, ethnocultural, linguistic or religious diversity, etc.) 3. Staff members provide adults with: ▪ the support they need to freely and fully express the reason for their visit or request for services ▪ information about the various services provided, their availability and the resource persons with whom they can meet ▪ precise and accurate details on the eligibility conditions or costs of the various services ▪ help finding and understanding the information they need 4. Staff members collect contact information about the adults and other information needed to ensure the continuity of services. 5. Staff members determine whether it is necessary to refer the adult to second-level reception services or to another service. 6. Staff members apply the reception procedures approved by the school board or the service, both for reception in person and for reception by telephone or mail (postal or electronic). 7. Reception procedures are periodically updated. 8. The list of partner organizations is periodically updated.

EXAMPLES OF DATA USED FOR ANALYSIS	
EXAMPLES OF TARGETS OR EXPECTED OUTCOMES	**EXAMPLES OF INDICATORS**
▪ Existence of reception procedures ▪ Clear rules for referring adults to second-level reception services or any other service ▪ Directory or list (updated every x months) of partners and their services ▪ Review of reception procedures every x years	▪ Satisfaction level of adults regarding the services received ▪ Satisfaction level of staff members regarding the services provided ▪ Appropriate rates of referral of adults to second-level reception services or other services, including partner organizations

3.5.2   SECOND-LEVEL RECEPTION SERVICES

DESCRIPTION
Staff members responsible for second-level reception services help adults to establish a comprehensive review of their situation and decide with them on the next steps to be taken, including referral to other services, if necessary.

STRATEGIES OR MEANS	
DETAILS OF THE STANDARD	1. During an interview, the adviser helps the adult to: • clarify their purpose or reason for seeking second-level reception services • identify his/her interests, strengths, weaknesses, etc. • better understand his/her situation by evaluating their educational level and analyzing his/her academic record • list his or her informal learning as well as personal and work-related learning, which may be included in the exploration of the adult's prior learning, and possibly be recognized • process data and information that can be used to analyze his/her situation • explore various possibilities concerning education and training, employment and career options • establish the various steps to carry out his/her personal plan • find out about the resources available through SARCA services, at the school board and in the community • recognize the need to continue analyzing his/her situation and to seek the help of another specialist in the school board or a partner organization that is qualified in various areas 2. The professional staff members provide information on the content of the interview report in the adult's file and give him/her a copy on request.

EXAMPLES OF DATA USED FOR ANALYSIS	
EXAMPLES OF TARGETS OR EXPECTED OUTCOMES	**EXAMPLES OF INDICATORS**
• Existence of statistical reports on the services provided • Existence of interview reports on second-level reception services in conformity with the MELS reference framework.[1]	• Satisfaction level of adults regarding the services received • Satisfaction level of staff members regarding the services provided • Appropriate rates of referral of adults to another service or a partner organization

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1. Québec, Ministère de l'Éducation, du Loisir et du Sport, Direction de l'éducation des adultes et de l'action communautaire, *SARCA Reception Services : The Gateway for Adult Learners.* Québec: Ministère de l'Éducation, du Loisir et du Sport, 2013.

3.6 THE EXPLORATION OF PRIOR LEARNING

DESCRIPTION
Professional staff members help adults to become aware of their potential and acquire greater confidence in their options by exploring and identifying their formal and experiential learning.

STRATEGIES OR MEANS	
DETAILS OF THE STANDARD	1. The advisor: ▪ helps the adults analyze and understand their formal learning and the equivalences associated with it, if any ▪ helps adults draw up a list of the learning and competencies they have developed outside of school ▪ provides information about the different mechanisms for the recognition of prior learning in general education or vocational training and, if appropriate, also advises adults on how to obtain such recognition ▪ provides adults with information about the program(s) related to their education, training and career plan ▪ considers and uses the exploration of the learning process as a way to guide adults 2. The professional staff members provide information on the content of the interview report in the adult's file and give him/her a copy on request.

EXAMPLES OF DATA USED FOR ANALYSIS	
EXAMPLES OF TARGETS OR EXPECTED OUTCOMES	**EXAMPLES OF INDICATORS**
▪ Existence of statistical reports on the services provided ▪ Existence of summary reports in conformity with the orientations of MELS	▪ Satisfaction level of adults regarding the services received ▪ Satisfaction level of staff members regarding the services provided ▪ Appropriate rates of referral of adults to another service or a partner organization

3.7   CAREER AND GUIDANCE COUNSELLING

DESCRIPTION
Professional staff members help adults to develop the competencies required for the process* of making educational and career choices throughout their lives.

STRATEGIES OR MEANS	

DETAILS OF THE STANDARD	1. The advisor:
	  ▪ helps the adults understand themselves (needs, interests, aptitudes, etc.)
	  ▪ helps the adults explore the job market
	  ▪ helps the adults better understand their personal development, their environment and the interaction between them
	  ▪ helps the adults become aware of the various training programs that are available to them, and of the implications these programs may have
	  ▪ helps the adults develop the ability to participate in a decision-making process
	  ▪ helps the adults select an training and career plan that is appropriate for them
	
	2. The advisor provides adults, if necessary or on request, with information documents, test or evaluation results.
	
	3. The advisor uses various approaches and strategies according to the needs and context.
	
	4. The advisor enables the adults to recognize the need to continue their analysis and to call on another specialist from the school board or a partner organization who is qualified in various fields.

EXAMPLES OF DATA USED FOR ANALYSIS	
EXAMPLES OF TARGETS OR EXPECTED OUTCOMES	**EXAMPLES OF INDICATORS**
▪ Existence of statistical reports on the services provided ▪ Follow-up meetings with staff members on provision of guidance services ▪ X % increase in the number of action plans established with the adults	▪ Satisfaction level of adults regarding the services received ▪ Satisfaction level of staff members regarding the services provided ▪ Appropriate rates of referral of adults to another service or a partner organization ▪ Rate of establishment of formal action plans for adults who have used career and guidance counselling services

* A process involving the construction of identity, the processing of information, the establishment of links with their experiential learning, in interaction with the milieu.

3.8 SUPPORT

DESCRIPTION
Staff members providing support for adults strengthen their motivation and commitment to undertake and complete a plan. They ensure continuity of services within the school board or with external partners.

	STRATEGIES OR MEANS
DETAILS OF THE STANDARD	1. SARCA staff members: 　▪ maintain a relationship of trust with adults, appreciate their abilities and acknowledge their achievements 　▪ provide information about the different resources available, discuss the advantages of using these resources and provide any needed assistance 　▪ serve as a link between internal and external resources 　▪ help adults make connections between various resources and their personal situation, aspirations and plan 　▪ provide adult learners with advice regarding their education, training and career plan and how to implement it 　▪ help adults understand the implications of their plan as well as the necessary conditions for its successful implementation, including their own strengths and weaknesses, making sure that their approach is educational 　▪ provide support during the implementation of the plan and, when necessary, the advice needed to make adaptations or overcome difficulties 　▪ discuss with adults the ways to provide support in order to achieve shared satisfaction 2. A procedure for the transfer of adults' files has been established to make it possible to monitor their progress and to facilitate the circulation of information among those concerned. 3. The adults have received a document on the activities carried out (summary report, document, etc.). Staff members periodically review the means of support provided.

EXAMPLES OF DATA USED FOR ANALYSIS	
EXAMPLES OF TARGETS OR EXPECTED OUTCOMES	**EXAMPLES OF INDICATORS**
▪ Existence of procedures permitting follow-up between the different services of the school board and the partners ▪ Existence of statistical reports on the services provided ▪ Review of support procedures every x years ▪ X% increase in the number of action plans established with adults ▪ X% increase in the number of adults receiving support in the achievement of their action plan	▪ Satisfaction level of adults regarding the support received from SARCA staff members ▪ Satisfaction level of staff members regarding the support provided to adults ▪ Appropriate rates of referral of adults to another service or a partner organization ▪ Percentage of adults actively involved in their action plan ▪ Percentage of adults who have completed their action plan

3.9 INFORMATION

DESCRIPTION
SARCA staff members develop the adults' capacity to find the information and documentation they need to make informed choices and decisions. The information is available in all the areas in which SARCA operates.

STRATEGIES OR MEANS	
DETAILS OF THE STANDARD	1. The information : ▪ is up-to-date, accurate and adapted to the adults' situation ▪ is readily accessible in the mode and format that best suit the adults' needs 2. The staff members : ▪ provide the adults with information sources to consult and help them to adopt methods for identifying and interpreting the information and assessing its validity and utility ▪ make sure that the adults fully understand the information and process it correctly ▪ encourage the adults to seek help from an external organization when there is no internal information, and may, if necessary, do this on behalf of the adults

EXAMPLES OF DATA USED FOR ANALYSIS	
EXAMPLES OF TARGETS OR EXPECTED OUTCOMES	**EXAMPLES OF INDICATORS**
▪ Existence of administrative guidelines to ensure the accuracy, relevance, accessibility and availability of information ▪ Existence of procedures for updating information	▪ Satisfaction level of adults regarding the relevance, accessibility and availability of the information ▪ Satisfaction level of staff members regarding the support and information provided ▪ Appropriate rates of referral of adults to another service or a partner organization

3.10 PROACTIVE APPROACH

DESCRIPTION
Motivated by concern for educational issues that affect their community, SARCA staff members become involved in it and take action with their partners to reach out to adults, in order to help them express their request for services and carry out a plan.

STRATEGIES OR MEANS

1. SARCA staff members:
   - are effectively deployed in the territory
   - travel in order to be available in strategic places where the adults are located
   - participate in the activities of the community served by the school board and partner organizations
   - focus on the needs and characteristics of the populations targeted by the Government Policy on Adult Education and Continuing Education and Training, in accordance with the priorities established by the school board (16- to 24-year-olds, immigrants, etc.)
   - understand and respect the scope of their responsibilities and competencies, and draw, when necessary, on resources appropriate for adults whose needs they cannot satisfy
   - take initiatives to inform the communty about the various services available
2. SARCA staff members maintain up-to-date knowledge about:
   - the characteristics and career and guidance counselling needs of the population
   - the services (community, public and private) available
3. Proactive measures are adapted to the context and needs of the target populations.

EXAMPLES OF DATA USED FOR ANALYSIS	
EXAMPLES OF TARGETS OR EXPECTED OUTCOMES	**EXAMPLES OF INDICATORS**
- Existence of SARCA services in the community - Existence of service directories - Existence of collaboration and partnerships - Statistical Portrait of the population without a first diploma in the territory - Presentation of services to partners and community members every *x* years - Existence of statistical reports on the effectiveness of proactive measures - Review of proactive measures every *x* years	- Satisfaction level of partners regarding the visibility of SARCA services - Satisfaction level of partners regarding proactive measures - Percentage of adults in the population reached by proactive measures - Percentage of the population familiar with SARCA services - Percentage of staff members with training on the characteristics of the target population

3.11 PARTNERSHIP

DESCRIPTION
SARCA staff members work with the services of the school board and partners in the education community to ensure the accessibility, complementarity and continuity of the services provided to the adults.

STRATEGIES OR MEANS	

DETAILS OF THE STANDARD	1. All staff members:
	  ▪ form a comprehensive network
	  ▪ organize discussions
	  ▪ know the services provided by each partner and keep their information up-to-date
	  ▪ consult each other on appropriate approaches, strategies and actions
	  ▪ establish procedures to maintain continuity between different interventions
	  ▪ agree on models of collaboration and on actions to undertake in order to improve the adults' situation
	  ▪ regularly review the effectiveness of referral procedures
	  ▪ share and reapply their knowledge of the field, particularly as regards changes that are being made
	2. All staff members are given a presentation on personal plans in the context of SARCA services. The roles, responsibilities, mandates, resources and services of each partner differ, but they are known and respected by all staff members.
	3. Staff members maintain up-to-date knowledge concerning:
	  ▪ the characteristics of the population and its career and guidance counselling needs
	  ▪ the services (community, public and private) available
	4. Proactive actions are adapted to the context and needs of the target populations.

EXAMPLES OF DATA USED FOR ANALYSIS	
EXAMPLES OF TARGETS OR EXPECTED OUTCOMES	**EXAMPLES OF INDICATORS**
▪ Existence of procedures for referral by SARCA staff ▪ Existence of local or regional service directories, or both ▪ Existence of mechanisms for collaborating with other services of the school board and with partners ▪ Meetings of SARCA services x times per year with their partners	▪ Satisfaction level of adults, partner organizations and SARCA staff members regarding continuity between services ▪ Percentage of organizations in the field with whom partnerships have been established

CONCLUSION

The components and analytical tools presented in this document are intended to serve as guidelines for decision making by school boards and to introduce a form of results-based management resulting in better and more equitable services.

Overall, this document lays the basis for an organizational diagnosis designed to optimize services. It makes it possible to update the functions and roles of all those involved and proposes effective models for daily organization. The communication and sharing of expertise required by this diagnosis will indubitably strengthen the professional ties of staff members for the benefit of the adults.

This project now belongs to the whole school system. School board authorities and SARCA staff members are invited to develop their own evaluation strategies and design tools and procedures that reflect as closely as possible the realities and conditions in their school board. As we all know, dialogue and discussion are essential to the continuous development and improvement of SARCA services throughout Québec.

APPENDIX

Example of an operational plan for the continuous improvement of SARCA services

Centre: _____   **Date:** _____

Component	Examples of elements to be analyzed	Monitoring				Responsibility	Recommendation or comment
1. SARCA Statement of Service	**Targets or expected outcomes**	**Existence**	**Last update**	**Follow-up (actions planned)**	**Deadline**		
	Declaration of services						
	Service communication plan						
	Indicators	**Current**	**Targeted**	**Follow-up (actions planned)**	**Deadline**		
	Rate of referrals to SARCA by partners						
	Level of demand for services						

COMPONENT	Examples of elements to be analyzed	MONITORING				Responsibility	RECOMMENDATION OR COMMENT
2. Management of services	**Targets or expected outcomes**	**Existence**	**Last update**	**Follow-up (actions planned)**	**Deadline**		
	Procedures, mechanisms and operating rules						
	Roles and responsibilities of staff members						
	Indicators	**Current**	**Targeted**	**Follow-up (actions planned)**	**Deadline**		
	Incidence of complaints						
	Percentage of staff members receiving training in their first year						
Component	Examples of elements to be analyzed	Monitoring				Responsibility	Recommendation or comment
3. Management of the adult's file	**Targets or expected outcomes**	**Existence**	**Last update**	**Follow-up (actions planned)**	**Deadline**		
	Administrative instructions on the processing and storage of the adults' files						
	Computerized system for recording data						

Component	Examples of elements to be analyzed	Monitoring				Responsibility	Recommendation or comment
3. Management of the adult's file	**Indicators**	**Current**	**Targeted**	**Follow-up (actions planned)**	**Deadline**		
	Rate of conformity of files						
	Satisfaction level of staff members regarding access to and content of files						
Component	**Examples of elements to be analyzed**	**Monitoring**				**Responsibility**	**Recommendation or comment**
4. Competencies of staff members	**Targets or expected outcomes**	**Existence**	**Last update**	**Follow-up (actions planned)**	**Deadline**		
	Training plan for staff members						
	Procedure for updating staff members regarding the characteristics of the target populations						
	Indicators	**Current**	**Targeted**	**Follow-up (actions planned)**	**Deadline**		
	Satisfaction level of staff members regarding the services provided						
	Satisfaction level of adults regarding staff members						

Component	Examples of elements to be analyzed	Monitoring				Responsibility	Recommendation or comment
5.1. First-level reception	Targets or expected outcomes	Existence	Last update	Follow-up (actions planned)	Deadline		
	Reception procedures for adults						
	Statistics on demand for services						
	Indicators	Current	Targeted	Follow-up (actions planned)	Deadline		
	Satisfaction level of staff members regarding the services provided						
	Appropriate rates of referral of adults to other services						

Component	Examples of elements to be analyzed	Monitoring				Responsibility	Recommendation or comment
5.2. Second-level reception	**Targets or expected outcomes**	**Existence**	**Last update**	**Follow-up (actions planned)**	**Deadline**		
	Framework of an action plan						
	Statistics on the various services provided						
	Indicators	**Current**	**Targeted**	**Follow-up (actions planned)**	**Deadline**		
	Satisfaction level of staff members regarding the services provided						
	Appropriate rates of referral of adults to other services						

Component	Examples of elements to be analyzed	Monitoring				Responsibility	Recommendation or comment
6. Exploration of prior learning	**Targets or expected outcomes**	**Existence**	**Last update**	**Follow-up (actions planned)**	**Deadline**		
	Reference procedure regarding recognition of acquired competencies (RAC)						
	Statistics on the various services provided						
	Indicators	**Current**	**Targeted**	**Follow-up (actions planned)**	**Deadline**		
	Satisfaction level of staff members regarding the services provided						
	Satisfaction level of adults regarding the services received						

Component	Examples of elements to be analyzed	Monitoring				Responsibility	Recommendation or comment
7. Career and guidance counselling	**Targets or expected outcomes**	**Existence**	**Last update**	**Follow-up (actions planned)**	**Deadline**		
	Tools and materials for career and guidance counselling						
	Statistics on the various services provided						
	Indicators	**Current**	**Targeted**	**Follow-up (actions planned)**	**Deadline**		
	Satisfaction level of adults regarding the services received						
	Rate of establishment of action plans for adults who have used career and guidance counselling services						
Component	**Examples of elements to be analyzed**	**Monitoring**				**Responsibility**	**Recommendation or comment**
8. Support	**Targets or expected outcomes**	**Existence**	**Last update**	**Follow-up (actions planned)**	**Deadline**		
	Procedures for follow-up, support and career and guidance counselling for adults						

Component	Examples of elements to be analyzed	Monitoring				Responsibility	Recommendation or comment
8. Support	Statistics on the various services provided						
	Indicators	**Current**	**Targeted**	**Follow-up (actions planned)**	**Deadline**		
	Percentage of adults actively involved in their action plan						
	Percentage of adults who have completed their action plan						
Component	**Examples of elements to be analyzed**	**Monitoring**				**Responsibility**	**Recommendation or comment**
9. Information	**Targets or expected outcomes**	**Existence**	**Last update**	**Follow-up (actions planned)**	**Deadline**		
	Procedure for updating information						
	Indicators	**Current**	**Targeted**	**Follow-up (actions planned)**	**Deadline**		
	Satisfaction level of staff members regarding the support and information provided						
	Satisfaction level of adults regarding the relevance, accessibility, and availability of the information						

Component	Examples of elements to be analyzed	Monitoring				Responsibility	Recommendation or comment
10. Proactive approach	**Targets or expected outcomes**	**Existence**	**Last update**	**Follow-up (actions planned)**	**Deadline**		
	Procedure for assigning staff members within the territory according to needs						
	Annual schedule of promotional activities (salons, conferences, etc.)						
	Indicators	**Current**	**Targeted**	**Follow-up (actions planned)**	**Deadline**		
	Satisfaction level of partners regarding the visibility of SARCA services						
	Percentage of staff members with training regarding the characteristics of the target population						
Component	Examples of elements to be analyzed	Monitoring				Responsibility	Recommendation or comment
11. Partnership	**Targets or expected outcomes**	**Existence**	**Last update**	**Follow-up (actions planned)**	**Deadline**		
	Directory of community organizations and partners						

11. Partnership	Procedures for the referral and transfer of the adults' files						
	Indicators	**Current**	**Targeted**	**Follow-up (actions planned)**	**Deadline**		
	Percentage of organizations in the field with whom partnerships have been established						
	Satisfaction level of adults, organizations, partners and SARCA staff members regarding continuity between services						

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