Part B: Using the ERS with Clients

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ERS Agency Staff Training Notes

Part B: Using the ERS with Clients

Working with Clients

B1. Accessing Client Material from the Agency Site
You can access all of the client information you need from your Agency site: the Feedback Report, the Summary Report, the Action Plan, and the overall coding or readiness. On “Client Assistance Functions,” click on View/Select/All and “go” to bring up the table of clients. Then click on the “pencil” icon next to one of the client names to get to the ERS Admin screen. Then click on any of the client reports:

⇒ Summary.
⇒ Feedback Report.
⇒ Action Plan.

This screen also categorizes the ERS results as “Not ready”, “Minimally Ready”, or “Fully Ready.” These terms are defined on that screen and also in “ERS Levels of Readiness” on the left-hand menu bar.

B2. Reviewing Feedback Reports
A periodic review of the Feedback Reports your clients are generating can help improve the process of administering the ERS and the overall validity of the reports. This can be done individually with staff who debrief the Feedback Reports with clients, or as a group in a staff meeting. Here are some items to consider during the review:

a) What are the clients’ perceptions of the feedback reports?
b) What are the staff perceptions of the feedback reports?
c) Are the results matching the staff’s impressions of their clients’ level of employability?
d) Look for patterns that may suggest that the client is not completing the ERS correctly. For example: Client has all low or all high results. If the client is just clicking through without reading the questions, they may stay to one side of the 5-point scale and true/false sections. An example would be a client clicking on the left side of the answering field (Strongly Disagree on the 5-point scale and True on the true/false section) which would result in low scores on the employability factors and supports, and yet a low level of challenges. This combination would be rare to find with clients who are answering the ERS in a reasonably honest manner.

e) For other ERS score patterns to look for and strategies for assisting clients with them, see the following:

   o Section B9, “Addressing Client Needs from the Client Feedback Report”
   o On the ERS Agency site under “Helping Clients Get Employment Ready” (downloadable), see:
• “Explaining the ERS Feedback Report”
• “Understanding ERS Patterns”
• “How to Address Ongoing Career Management” (in the Ongoing Career Management section of “Helping Clients Get Employment Ready”) – this can be used as a client handout

B3. Reviewing Client Summaries

Here are some general pointers on selecting actions based on the Client Summary:

a) Job Search is generally the last employability factor that you should address.
b) Address low Self-Efficacy (self-esteem) and low Outcome Expectancy as soon as possible because they can keep the client from benefiting from other interventions.
c) Address low Career Decision-Making before addressing low Skills Enhancement or low Job Maintenance.
d) Low Social Supports can be addressed at least in part through a job club type intervention.
e) Low Work History can be addressed at least in part through a work placement.
f) Low Ongoing Career Management will not affect clients until they have been on a job for a while.

The ERS results in the Summary are intended to help you select the most important areas of focus in working with your clients. You do not necessarily need to review each of the factors with the client. For example, instead of saying, “You are low in career decision-making and skills enhancement,” you’ll want to say something like, “It looks like the most helpful thing(s) we could focus on together are getting clear on your career focus and making sure you have the skills you need to get the kind of job you want – does that make sense to you?”

The clients you see may be in a crisis situation with regard to earning money and not be interested in what appears to be a long list of interventions that they might need. As your agency uses the ERS with your clients, you should begin to get a good feeling for the areas in which clients most often need help from the “Where Are Our Clients Starting From?” report. You may wish to think through ways to enhance existing programs that you offer (e.g., adding job maintenance issues to a job club) or short complementary interventions that you could offer (e.g., a weekly group meeting to discuss challenges on the job in which self-esteem and job maintenance and ongoing career management issues could be discussed).

B4. Reviewing how the Action Plan is used

Once you have had a chance to use the Action Plan function with clients, you will need to decide whether or not you want clients updating it on their own. If you do, simply make sure that they have the URL of the ERS website (www.EmploymentReadiness.com), as well as their Client User Name and Client Password. While having clients update their own action plans has the advantage of empowering the client to take charge of their own record-keeping, it also means that they have access to taking the ERS again whenever they choose. If you think the client might be tempted to re-take the ERS on their own,
this would be a reason not to share the username and password with them; it’s important for the integrity of your ERS data to have clients wait to re-take the ERS at designated times (usually after completing an intervention).

B5. The difference between Action Plan and Local Programs coding.

The Action Plan is intended for detailed small steps that a client might take, including actions that are not formal local programs. The Action Plan provides the client with a To Do list. It is not linked to any of the agency reports or to the Local Programs coding.

The Local Programs coding is intended to help you assess the effectiveness of different interventions. It is linked to the Interventions report. For data integrity, it is therefore important to ensure that all clients are coded to all programs that they are attending.

Managing Client Information

B6. Sorting/Listing Clients

Now that you have had several clients complete the first administration of the ERS, you may find it helpful to use the sorting features to list clients in the database. From “Client Assistance Functions”, you can get a listing of all clients or clients with a particular letter of the alphabet at the beginning of their last name. To view all clients, click on the circle in front of View. The default list is set for “All” so just click on the orange “go” button. You will see a table display of all the clients you have set up in your database. To view a list of clients by the first letter of their last name(s), click on the circle in front of View. From the drop down menu, select the letter of the alphabet corresponding to the first letter of the last name for the client or clients you are searching for.

Further sorting of client listings can be accomplished with any combination of the following categories:

a) By Status: Select either Active or Inactive clients. Note: all new clients are defaulted as Active (see Section A7 for instructions to activate or deactivate clients).

b) By Date of First ERS Administration: The default date range includes all clients.

c) By Client Coding Option: Select any combination of the coding variable options (one option per variable) you have set up (see the Set-Up Guide for Agencies for more information on setting up Client Coding).

d) By Client Variable: When you select a variable and click on “go”, you will get a listing grouped by coding option. The first section to appear will be the clients that have not yet been coded on that variable. This will allow you to go through and code those clients quickly.

e) By Local Program: You can select “All” to get a listing grouped by Local Programs. The first section is the list of clients that have not been coded to any local program, followed by the local programs that you have set up, in sequence, with the names of clients coded to them. Or you can select a single local program and get all of the clients coded to it. You can also combine this
with Client Coding Options to get, for example, all provincially-funded clients with Martin as case worker listed by local program.

B7. **Printing Options**
Once you have generated a table of client information, there are three options to print your client list:

a) **Print Results:** prints all clients you have selected from your search
b) **Print Page:** prints just the clients showing on that page
c) **Print All:** prints list of all clients in your database

B8. **Using the Up/Down Arrows**
Once you have displayed the table of your clients, you will see arrows at the top of the columns that allow you to reorder the table in sequences other than by last name. Selecting the Up (↑) arrow will reorder the table from the lowest value to the highest value in that column. For example, if you select the Up arrow for ERS Admin (pencil icon), clients will be ordered from “0” administrations to “3” administrations. So you can quickly see who has not yet taken the ERS (grey pencil with “0” subscript) or only taken it once (orange pencil with “1” subscript). For the other icons, selecting the Up arrow will bring to the top of the list any clients who have not been coded yet (the grey icons).

Selecting the Down (↓) arrow will reorder the table from the highest value to the lowest value in that column. For ERS Admin, this will bring any clients who have taken the ERS three times to the top of the list. This is an easy way to see if any clients have taken the ERS more than once. For the other icons, you will get all of the clients who have been coded (the orange icons) – an easy way to see if coding is taking place.

**Resources for Staff**

B9. **Addressing Client Needs from the Client Feedback Report**
Some agencies have the mandate to assist clients in addressing all aspects of employment readiness, while other agencies may specialize in one or more particular areas such as career decision-making or job search. On the Agency website, under “Helping Clients Become Employment Ready,” there is a document for you called “Explaining the ERS Feedback Report.” This gives you suggestions of comments or questions you can use based on how the client has scored. Below we have pointed out some “quick approaches” that can be used if the client’s ERS scores reveal a need for assistance that is beyond the scope of your agency’s mandate to deliver.

**Challenges:** In working with clients and their Feedback Report, it usually works best to start with the Challenges at the bottom of the report. These are personal, environmental or systemic factors that may interfere with the client’s successful transition to work and/or their ability to maintain work once they find it. There are three categories of potential scores, as follows:

Low 
No challenges, or challenges that are not likely to interfere with
getting or keeping a job

Medium  Some challenges that could interfere with getting and keeping a job
High   Lots of challenges, very likely to interfere with getting and keeping a job

It does make a difference what types of challenges the client is reporting. If, for example, they are “high” on personal challenges but “low” on environmental and systemic challenges, then the issues are all ones that they need to tackle themselves – e.g., a substance abuse problem, or too little education. These types of problems typically are barriers to obtaining work and may also affect their ability to keep a job once they have found one. Addressing these challenges usually means getting the client engaged in a specific “pre-employment” assistance program – like a substance abuse program, or an adult education program.

On the other hand, being “high” on environmental challenges means that there are issues or responsibilities that could interfere particularly with keeping a job – e.g., child care responsibilities. Here you want to notice whether or not the client is “high” on Social Supports – i.e., do they have someone they can turn to if they are having problems (e.g., the child is sick) so that those problems don’t interfere with work.

⇒ Quick Approach: Ask the client what they would do if .... (certain circumstances came up linked to whatever the particular challenge is). By spending a couple of minutes helping them anticipate problems, you can improve their chances of coping well with environmental challenges.

Usually you will not find clients being “high” on systemic challenges (those beyond their control). Most commonly, if they are, you are dealing with a client who is blaming others and “the system” for their inability to get or keep a job. Then you would want to check Self-Efficacy and Outcome Expectancy – if they are both low, there is likely to be a motivational problem.

⇒ Quick Approach: Point out that there will always be barriers that the client will have to figure out how to manage. Then take one issue (e.g., lack of low-cost transportation) and ask the client what they can do about getting to work.

Please remember that, even if all three types of challenges are “low” at the present time, this could change in the future so having Supports for coping with Challenges is important for everyone.

Supports: The main reason that four types of Supports are measured by the ERS is to see whether the client has the personal resources to deal with the challenges or barriers they face. Being high on Supports also increases the likelihood of the client becoming self-sufficient in each of the five employability dimensions. Ideally, we want clients to be “high” in all four areas.
If the client is “low” in Self-Efficacy and/or Outcome Expectancy, often they need some kind of life skills intervention before they will really benefit from programs and services that address employability dimensions. In other cases, occupational and life skills development can be effectively combined within the same program.

⇒ Quick Approach: In group briefings, encourage clients to share successes and then give them recognition for the strengths that are reflected in these successes.

If the client is “low” in Social Supports, they will need help in getting linked into community networks. If you have a mentoring program, those who are low on Social Supports would be good candidates to participate.

⇒ Quick Approach: Structure group meetings or briefings with clients so that they build networks among themselves.

If the client is “low” in Work History, you will want to help ensure that their next work experience is a good one. You can do this by getting them into a work setting (perhaps Wage Subsidy or Workplace-Based Training) where additional supervision is provided. If they are “self-sufficient” on Job Maintenance but low in Work History, they may simply not have had good paid work opportunities. Women returning to the workforce often fall into this category. Identifying the transferable skills that the client has acquired (e.g., through parenting) can help such clients to see that, in fact, they have a great deal of relevant work experience, even if they weren’t in a salaried position. Sometimes all that is needed is to have them check back with you a week or two after placement so you that can help sort out any difficulties they may be having.

⇒ Quick Approach: Look out for employers who believe in good supervision of new employees and place them there.

Employability Dimensions: The first dimension to look at is Career Decision-Making. Self-sufficiency here often provides the focus and passion that will carry clients through difficult times. If clients are not self-sufficient, usually they need help with career exploration or career focus. A wide range of career-related resources are available that they could use, including programs like computer / Internet based resources such as CHOICES. Or, especially if they were “low” on Self-Efficacy, they may benefit from a Career Exploration intervention (individual or group).

⇒ Quick Approach: Address any fears they may have about making a bad decision that they may be stuck with for a lifetime. Talk with the client about making a career choice or career commitment at least for the next 3 years so that they can get started.

Once they know what occupation or position they want to pursue, then the issue is whether or not they have the skills to do it (Skills Enhancement). If a client happens to be “not self-sufficient” in Career Decision-Making and “self-sufficient” in Skills
Enhancement, there is potentially a problem. How can clients know if they have the skills they need if they are not sure what they want to do? Once they are “self-sufficient” in Career Decision-Making, you will want to revisit the issue of skills.

⇒ Quick Approach: Talk with the client to see if their assumptions about the skills they will need to get started in a job are accurate.

Before clients start looking for work, you will want to be sure that they are “self-sufficient” in Job Maintenance. Most people would find it very demoralizing to get a job and then lose it due to a lack of job maintenance skills! Job Maintenance skills include being able to manage your moods, being willing to take direction and accept supervision, and being able to get along with co-workers and work as a team. Clients who need help in this area would benefit both from specific interventions that develop these skills and/or from being placed with employers who provide close supervision initially or who provide a mentor or coach.

⇒ Quick Approach: Talk with the client about examples of things they might do that could get them fired, and help them problem-solve a more constructive approach. This can also be done in a group of clients.

When clients are “self-sufficient” in Career Decision-Making, Skills Enhancement, and Job Maintenance, then they usually are ready to start looking for work. If they are not already “self-sufficient” in Job Search, they may need help with resume preparation and interview skills in addition to strategies for job search. Structured programs, like Job Clubs, can be very effective.

Do clients need to be Fully Ready in order to succeed in the labor market? Certainly not. But if your agency is cultivating good working relationships with employers in your community, those employers are more likely to be satisfied with clients as employees the closer they are to Fully Ready.

Knowing a client’s level of job readiness prior to placement into a job can provide a great deal of insight into what supports they may need to assist them in maintaining their employment. For some clients, there is one particular area in which they need help and so the method of assistance is obvious. But many clients appear as not ready on a number of factors. This does not mean that they need an intervention for each factor! Here is a general approach you can use in the form of a sequence checklist:

<table>
<thead>
<tr>
<th>If the client scores:</th>
<th>You can:</th>
</tr>
</thead>
<tbody>
<tr>
<td>High on Challenges</td>
<td>Refer the client to community resources for help with the most pressing challenges</td>
</tr>
<tr>
<td>Low on Self-Efficacy and/or Outcome Expectancy</td>
<td>Refer the client to a life skills program</td>
</tr>
<tr>
<td>Low on Career Decision-Making</td>
<td>Provide career counseling or refer the client to a career exploration program</td>
</tr>
<tr>
<td>Low on Skills Enhancement</td>
<td>Once the career choice is clear, refer the client to</td>
</tr>
</tbody>
</table>
the appropriate skills training or apprenticeship
program

<table>
<thead>
<tr>
<th>Low on Job Maintenance and/or Work History</th>
<th>Before the client starts looking for work, address any issues that could cause them to lose a job once they got one</th>
</tr>
</thead>
<tbody>
<tr>
<td>Low on Job Search</td>
<td>Refer the client to a job club or other job search program</td>
</tr>
<tr>
<td>Low on Social Supports</td>
<td>Help the client network with community resources</td>
</tr>
<tr>
<td>Low on Ongoing Career Management</td>
<td>Talk with the client about career management issues</td>
</tr>
</tbody>
</table>

**B10. Addressing Ongoing Career Management**

Ongoing Career Management, while important, is not necessarily critical in getting an initial placement in the labor market. Once in a job, career management becomes very important if clients are to remain self-sufficient in moving between jobs or are to gain promotions within an organization. Many clients are so focused on getting a job that they are not interested in talking about these issues.

We have provided a handout that you can download and give to clients to give that provides tips on planning ahead and working toward their longer term career goals: go to “Helping Clients Get Employment Ready” on your Agency website, click on Ongoing Career Management, and then click on the hypertext link at the bottom of the screen.

**B11. Understanding ERS Patterns**

On the “Helping Clients Get Employment Ready” page, near the bottom, we have provided another document that you can download titled, “Understanding ERS Patterns.” It highlights for you the patterns that might raise questions and ways that you can deal with those patterns. Here is information about some additional patterns:

a) “Action Plan” on all factors

   When a client needs help on all nine factors, here is the optimal sequence:
   - Self-Efficacy and Outcome Expectancy (so they benefit from other help)
   - Career Decision-Making (so they have a direction to keep them going)
   - Social Supports (so that they keep going)
   - Skills Enhancement, Job Maintenance, Ongoing Career Management
   - Job Search and Work History

b) “OK” on Employability Dimensions, but “Action Plan” on one or more Supports (not counting Work History)

   This client is likely to look “ready” but will fail unless the supports are addressed.
c) “OK” on Job Maintenance, “Action Plan” on Work History
   This client has good transferable skills for dealing with work, but has not had good opportunities to apply them in a work setting. Women returning to paid work (e.g., after a period of absence for child rearing) often have this pattern.

d) “OK” on Ongoing Career Management, but “Action Plan” on other Employability factors
   This is a client with transferable “project management” skills (perhaps from family or volunteer activities) but without work success.

B12. The Connection between ERS Scores and Interventions Selected
On your Agency site under “Helping Clients Get Employment Ready” is a downloadable document entitled “Local Interventions to Address Employment Readiness Needs.” It summarizes where you might refer clients, based on their ERS scores.

Many organizations complete this document prior to ERS implementation. If it has been completed already, you will see a “Review” option that allows you to download and review the completed version for your organization. It can serve as a valuable resource when creating Action Plans with clients. It can also be helpful to revise it periodically to allow for changes in services provided by your agency and your community partners.

B13. Having Clients Re-Take the ERS
One of the unique features of the ERS is that it has been validated for repeat administration. You can give it again within five (5) days, or you can wait for months. Using all three administrations allows your clients to see their progress and allows your agency to generate reports showing the impact that your services have had, as well as how effective specific interventions are.

Please ensure that you understand how your agency intends to use the “re-take” feature and think through how you will arrange with clients to take the ERS again at those times.

B14. Client Needs Assessment Reports
Once you have 10 clients who have taken the ERS, you can begin to see patterns in client needs. From a reliability perspective, of course, you would want to have at least 50 clients in each category for which you run a report. To get an initial sense of the type of data you will be able to access, click on “Reports” in the lefthand menu bar and then view each of the following:
   a. Who?
      This report summarizes client demographics.
   b. Starting From?
      This report is structured to show the percent of clients who do not need help with a particular factor. To see the percent who do need help, subtract the number shown from 100.
   c. Challenges
      This report shows the five challenges reported by the most clients.