
**QUICK RESPONSE TRAINING AND
ADJUSTMENT (QRTA)
STRATEGIC INITIATIVES PROGRAM**

Summary Report

**Evaluation and Data Development
Strategic Policy
Human Resources Development Canada
and
British Columbia Ministry of Education, Skills and Training**

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EXECUTIVE SUMMARY

INTRODUCTION

In May 1994, the former Ministry of Skills, Training and Labour (MSTL) created Quick Response Training (QRT) as part of the Skills Now initiative under the theme of retraining workers in their communities. At that time, proposals for funding under QRT were submitted by public colleges and institutions. In its first year (1994/95), the program was administered by the Post Secondary Education Division of the MSTL.

In April of 1995, as part of the program realignment in MSTL, management responsibility for QRT was transferred to the Adjustment Programs Branch in the Skills Development Division. The mandate of the Skills Development Division is to help meet the particular challenge of structural changes in the British Columbia economy and labour market, and to address the demand for skills training. The Adjustment Programs Branch of this Division assisted individual businesses, workers, industry sectors and communities to develop adjustment strategies that anticipated and responded to change in the workplace.

Adjustment was defined as a process of responding to the effects of economic restructuring and of repositioning workers, employers and communities to take advantage of new opportunities and minimise the adverse impacts of economic dislocation.

By August of 1995, the original QRT program was redesigned to reflect a broader community adjustment element and was renamed Quick Response Training and Adjustment (QRTA). At about the same time, a joint agreement was concluded between the Governments of Canada and British Columbia that incorporated a number of strategic initiatives, one of which was QRTA. It was intended that the majority of QRTA projects be cost-shared between MSTL and Human Resources Development Canada (HRDC) and the employer. The federal and provincial funding was not to exceed 50% of the total cost and the employer was to contribute at least 50% of the total. Field delivery of QRTA commenced in September 1995.

The Ministry of Education, Skills and Training (MoEST) was formed in February of 1996 and incorporated many of the programs and services that had been provided by the former Ministry of Skills, Training and Labour. In early April of 1996, the Ministry of Education, Skills and Training transferred the QRTA program back to the Post Secondary Education Division. The program reverted to its original name, QRT, and continued as a Strategic Initiative until August of 1996 when provincial funding for the program was eliminated. HRDC continued

to provide services under the QRTA program until November of 1996 when no new federal funds were committed, and the program was terminated at the federal level as well.

EVALUATION PURPOSE AND APPROACH

The objective of the evaluation of the QRTA program was to determine:

- the fit between the intended and the actual implementation;
- the effectiveness of those implementation processes; and
- the recommendations for improvement.

The evaluation was focused specifically on the period of time from August 1995 to March 1996 when the program was being operated jointly by the provincial and federal governments. It was intended to provide insights that could be used to help improve future programming efforts and to meet the requirements of the Strategic Initiatives Program.

The primary data was collected through a series of interviews that incorporated two streams of questions. The first stream concentrated on the perceptions that program managers, consultants, employers and workers representatives had about the program structure and implementation. These perceptions were examined through a series of structured questions that were based on descriptions contained in the historical record. The structured questions were intended to determine the level of understanding regarding the way the program was designed and intended to be carried out.

The second stream of questions contained a series of open-ended questions. The open-ended questions were intended to provide an opportunity for respondents to express their opinion about how the program evolved, and conclusions to be drawn from the experience.

Both data types were examined in the interviews that were conducted with respondents in the following five categories: Program Managers, Adjustment and Labour Market Services Consultants, Program Service Officers and representatives of employers and employees.

EVALUATION FINDINGS

Program Design

There is consensus among all those who were interviewed that the problem which gave rise to the QRTA program was correctly defined and that the

intended response was consistent with the problem. The program and administrative co-ordination between the funding bodies for the most part was consistent. The resources that were available were adequate to meet the initial level of demand, and would very likely have continued to be adequate, had the program continued operating.

Program Delivery

Program managers and those responsible for direct delivery of the program expended considerable effort to accommodate the discrepancies between the federal and provincial administrative systems. This in turn helped to ensure that the employers and workers received quick and accurate service. As a result of the commitment of the federal and provincial representatives, the process of application and contracting was completed well within the time expected and with a minimum of inconvenience to employers.

In three of the four contracts for service that were reviewed, the employers and workers clearly represented the population that was intended to be served. In the fourth contract, some argument could be made that the potential impact of changing demands in that workplace were somewhat farther removed from the workers than in the other three settings.

The levels of expenditure that were generated in the early stages of the program were much lower than expected by senior managers in MoEST and HRDC. Those lower than expected levels of program expenditure are very likely to be reflective of factors such as the time employers need to:

- become aware of the program;
- understand the extent of its application to their circumstances;
- allocate the resources that they will need to contribute; and
- develop a proposal that can be submitted.

Program Outcomes

There were no major problems in identifying and accounting for the performance outcomes that were expected from the service. The performance problems that were identified related primarily to operational issues that developed during the delivery of services. In all cases that were discussed, the problems were easily defined and were subsequently resolved through consultation between the federal/provincial representatives and the employer.

During the initial period of operation from August to December of 1995, agreements to provide services were being established at a rate of 3.5 per month. The agreement rate increased to 15 per month in the period covering the

last three months of the program. That accounted for 69% of the total number of agreements that were established during the life of the program.

Those employer and work force representatives that were interviewed were unanimous in their support and high regard for the objectives of the program, the manner in which it was delivered, its value to the employer and, in particular, its immediate value to the employees. The interviews with consultants also indicate their view that there is a continued need for a program of this nature. Many of them reported that they continued to receive numerous inquiries about the program long after it had been terminated.

Implications for Future Programming

There was an ongoing, unresolved divergence of interest between the two goals of providing workplace-based training and that of providing workplace adjustment services. The province had an interest in promoting closer links between post-secondary institutions and those employers who were engaged in the provision of workplace-based training. The federal HRDC did not hold the same interest in the role of colleges, and was far more concerned with the provision of broader adjustment related services. Both parties became less than satisfied with those particular aspects of the program outcomes. With the lack of a strong adjustment focus, and a less than expected reliance on post secondary institutions in the provision of workplace-based training, the program began to appear as strictly a training initiative that was acting as a subsidy to business. This perception was incompatible with the program's original intentions.

In the early part of 1996, the QRTA program was facing the demands of realigning priorities within MoEST and was transferred back to the Post Secondary Division. Later in the same year MoEST, along with all other ministries, encountered the pressures of budget restrictions within the provincial government. During these times, QRTA failed to secure the internal support it needed and the province subsequently withdrew its involvement entirely in August of 1996. With the province having withdrawn, the federal government found itself as the sole provider of a joint service and consequently terminated its involvement as well.

CONCLUSIONS

Program Design and Delivery

The problem which gave rise to the QRTA program was correctly defined and the intended response was consistent with the problem.

The program and administrative co-ordination between the funding bodies was for the most part consistent.

Program managers and those responsible for direct delivery of the program successfully accommodated the discrepancies between the federal and provincial administrative systems.

The process of application and contracting was completed well within expectations.

The development and implementation of the joint application and contracting format is likely to have resolved many of the remaining internal administrative problems being encountered by federal and provincial representatives.

The resources that were available were adequate to meet the initial level of demand and would very likely have continued to be adequate, had the program continued operating.

Program Outcomes

There were no major problems in identifying and accounting for the performance outcomes that were expected from the service.

The program was held in high regard for its objectives, the manner in which it was delivered, its value to the employer and, in particular, its immediate value to the employees.

It is very likely that program outcomes would have continued to improve over time.

A program of this nature needs to be operated for at least one full year that includes a complete business budget cycle, before any reliable indication of its level of acceptance in the target population can be determined.

Implications for the Future

A number of factors contributed to the program's early termination. Within QRTA itself, the unresolved divergence of interest between the two goals of providing workplace-based training and that of providing workplace adjustment services eroded the level of support it received from both HRDC and MoEST. In addition, MoEST faced the demands of realigning priorities within the ministry, as well as the pressures of budget restrictions within the provincial government. The combination of factors resulted in the program failing to secure the provincial support it needed, and the province subsequently withdrew its involvement. With the province having withdrawn, the federal government found itself as the sole provider of a joint service and consequently terminated its involvement.

Great care should be taken in a situation where an existing program is being considered as a vehicle to deliver a modified form of service. The goals of the program, as well as the service delivery mechanism, need to be closely examined for any weakness or inconsistency in design. The procedures as well, need to be subjected to close scrutiny and be clearly formulated before the program is considered to be ready for delivery. Such care is needed in order to avoid having the expectations and assumptions that accumulated with the delivery of the program in its first form being carried over to the revised format.

MANAGEMENT RESPONSE

The Quick Response Training Program was an existing program within the Ministry of Education, Skills and Training when a Federal/Provincial agreement was signed in August, 1995. The revised program, Quick Response Training and Adjustment (QRTA) was incorporated in the agreement as one of the strategic initiatives. The objectives of the QRTA were to:

- respond quickly to worker training or retraining needs;
- promote a learning and training culture in industry;
- address the needs of workers and their families prior to an impending layoff by use of adjustment interventions such as assessment and counselling; and
- encourage public post-secondary institutions to be innovative in delivery.

Under QRTA the federal and provincial governments would provide up to 50% of the costs involved in retraining employees of companies involved in impending layoff or technological change affecting employee skill needs.

In order to achieve the above objectives, the QRTA:

- was delivered throughout the province by nine federal Labour Market Service Consultants and eleven provincial Adjustment Consultants who are situated in the regions;
- included preliminary discussions between the employer and the consultants, during which the employer received detailed information on QRTA and other government training programs that might be applicable to the situation; and
- required employers to request training from public post-secondary institutions prior to submitting an application for QRTA assistance.

As stated in the Summary Report, the objectives of the program evaluation were to determine:

- whether the program intent and actual implementation matched;
- the program's effectiveness in the community; and
- to provide recommendations for improvement in delivery.

The evaluators focused specifically on the period from August 1995 to March 1996, at which time the program was being jointly delivered by the federal and provincial governments. A series of in-depth interviews with consultants, employers, workers and program managers was completed which provided the following findings:

1. The problem facing employers and employees was correctly defined as one of providing relevant and easily accessible training to employed workers, and the QRTA program was the appropriate response to the problem.
2. Federal and provincial delivery staff successfully minimised the discrepancies between the program delivery operating systems in the two jurisdictions. This enabled employers to access the program with a minimum of difficulty.
3. The timeframe from application to contract execution was fairly tight and was consistent with the intent of the program.
4. In summary, the program was held in high regard for its objectives, the manner in which it was delivered, its value to the employer and its value to employees.

The evaluation has been reviewed from the perspective of its objectives and methodology, and its findings and recommendations have been accepted. In particular:

- The Management Committee is satisfied that QRTA was an effective resource for employers to assist their employees in adapting to changes in the workplace quickly and efficiently.
- The Management Committee recognises that a significant barrier to successful program implementation was created by the mid-course divergence of the interests of the two funding partners. The provincial government favoured the promotion of closer links between post-secondary institutions and those employers engaged in workplace-based training initiatives while the federal side wanted to retain the agreement's intent to use adjustment measures in tandem with training, where appropriate. However, it should be noted that this divergence was most evident in a period not included in the evaluation.
- The Management Committee commends the program delivery staff for their efforts to deliver the program in a streamlined manner under the differing operating systems of the two governments.
- As this Strategic Initiative is no longer funded by either party, no immediate further action is necessary. The Management Committee will, however, recommend that future joint programming require program priorities, objectives, and agreement commitments be clearly understood by all parties. Additionally, the Committee will require that joint administrative systems and communication strategies be in place prior to program implementation.

I . O INTRODUCTION

I . I QUICK RESPONSE TRAINING AND ADJUSTMENT: HISTORICAL CONTEXT

In May 1994, the former Ministry of Skills, Training and Labour (MSTL) created Quick Response Training (QRT) as part of the Skills Now initiative under the theme of retraining workers in their communities. At that time proposals for funding under QRT were submitted by public colleges and institutions. In its first year (1994/95), the program was administered by the Post Secondary Education Division of the MSTL.

In April of 1995, the Deputy Minister announced that, as part of the program realignment in the Ministry of Skills, Training and Labour, management responsibility for QRT was being transferred to the Adjustment Programs Branch in the Skills Development Division. The mandate of the Skills Development Division is to help meet the particular challenge of structural changes in the British Columbia economy and labour market, and to address the demand for skills training. The Adjustment Programs Branch of the Division assisted individual businesses, workers, industry sectors and communities to develop adjustment strategies that anticipated and responded to change in the workplace. Adjustment was defined as a process of responding to the effects of economic restructuring and of repositioning workers, employers and communities to take advantage of new opportunities and minimise the adverse impacts of economic dislocation.

By August of 1995, the original QRT program was redesigned to reflect a broader community adjustment element and was renamed Quick Response Training and Adjustment (QRTA). At that time a joint agreement was concluded between the Governments of Canada and British Columbia. That agreement incorporated a number of strategic initiatives, one of which was QRTA. It was intended that the majority of QRTA projects be cost-shared between MSTL and Human Resources Development Canada (HRDC) and the employer. The federal and provincial funding was not to exceed 50% of the total cost and the employer was to contribute at least 50% of the total. Field delivery of QRTA commenced in September 1995.

The Ministry of Education, Skills and Training (MoEST) was formed in February of 1996 and incorporated many of the programs and services that had been provided by the former Ministry of Skills, Training and Labour. In early April of 1996, the Ministry of Education, Skills and Training transferred the QRTA program back to the Post Secondary Education Division. The program reverted to its original name, QRT, and continued as a Strategic Initiative until August of

1996, when provincial funding for the program was eliminated. HRDC continued to provide services under the QRTA program until November of 1996 when no new federal funds were committed and the program was terminated at the federal level as well.

I .2 EVALUATION OBJECTIVES

The objective was to conduct an evaluation of the QRTA program to determine:

- the fit between the intended and the actual implementation;
- the effectiveness of those implementation processes; and
- the recommendations for improvement.

The evaluation was focused specifically on the period of time from August 1995 to March 1996. It was intended to provide insights that can be used to help improve future programming efforts and to meet the requirements of the Strategic Initiatives Program.

I .3 PROGRAM DESCRIPTION

The presumed need for QRTA programming included: ongoing industry restructuring, the ever-increasing skill demands of new production technologies, the shortage of training dollars, the slower and less flexible nature of other programs, and as the perceived need for colleges to become more actively involved in training in their respective communities.

The intent of the program was to furnish an incentive to employers to provide the necessary training when change or labour market adjustments occurred in the workplace before workers lost their jobs. In addition to supporting short-term, part-time training delivery to workers, assessment and counselling services were available. These interventions were also intended to be made available to the families of workers so affected in situations where that was seen to be appropriate.

The goal of the program was to support workers and their families in communities suddenly affected by actual or potential job loss, start-ups, shut-downs, new opportunities, restructuring, or changing technology. In order to ensure that businesses could respond quickly to local training or retraining needs caused by those types of circumstances, the program was designed to provide short-term intervention intended to address the particular circumstances in that workplace setting.

The overall objectives of the program were to:

- respond quickly to worker training or retraining needs;
- promote a learning and training culture in industry;
- address the needs of workers and their families prior to an impending layoff; and
- encourage public post-secondary institutions to be innovative in program delivery.

To help achieve those aims, QRTA was delivered jointly by Adjustment Consultants from MSTL, through Regional Skills Development Offices, and by Labour Market Services (LMS) Consultants through Human Resources Centres of HRDC. Eleven MSTL Adjustment Consultants were distributed over five regions and nine LMS Consultants in five HRDC areas. The consultants conferred with employers and could offer them the full range of Adjustment programs depending on need and eligibility requirements. Situations had to meet the following criteria in order to be eligible for funding under QRTA program:

- training had to be specific to the firm and recognised by the industry;
- intervention was intended to be on a “one time only” basis; and
- intervention was to be short term, normally less than six months.

The following activities were not eligible for funding under QRTA:

- conducting skills inventories or training needs assessments;
- developing curriculum;
- replacing workers' wages while on training;
- providing training already required under federal or provincial mandate;
- subsidising travel or accommodation expenses; and
- providing routine or regular training.

Persons directly benefiting from QRTA were expected to be from one of the following categories:

- current workers facing adjustment;
- workers threatened by job loss;
- recently displaced workers not eligible for Unemployment Insurance; or
- family members of affected workers.

There were four major stages in the delivery of the QRTA program:

1. Information Delivery

Employers obtained information about QRTA from Human Resources Centres of Canada (HRCC), Labour Market Services Consultants or Adjustment Consultants.

2. Preliminary Discussion With Employer

Initial discussions took place between the employer and the Adjustment or LMS consultant. The consultant could advise employers on all aspects of the QRTA, as well as other government programs and the relevant procedures for application.

Prior to submitting an application for QRTA funding, employers had to approach a public post secondary institution to determine if the college or institute could respond to their training need. The employer was required to demonstrate this assessment to the Adjustment Consultant and have adequate justification if they chose to use another training provider.

3. Employer Submitted Proposal

Employers had to submit only one formal request for assistance under QRTA. The request could be submitted to either the MSTL Adjustment consultant or the LMS consultant. It was incumbent upon the agency receiving the request to provide a copy as quickly as possible to the representative of the other level of government. Prior to responding to the proposal, the consultants conferred with each other. If appropriate, negotiation could take place between either MSTL or HRDC and the employer. Within MSTL, Adjustment Consultants had spending authority for QRTA, and within HRDC the spending authority was held at the regional level and the LMS Consultant had to advise the HRCC Manager regarding approval of contracts for service.

4. Contract Completion

Successful negotiations could result in the employer signing a joint contract with the federal and provincial governments or separate contracts with either the federal or provincial government. Contracts were administered by either government. Initially the forms and contracts used by MSTL and HRDC were different and although a joint application process and attendant forms were developed, the program was terminated before they could be fully implemented. Employers were subsequently required to account separately to each level of government for the services that had been delivered.

1.4 PROGRAM LOGIC MODEL

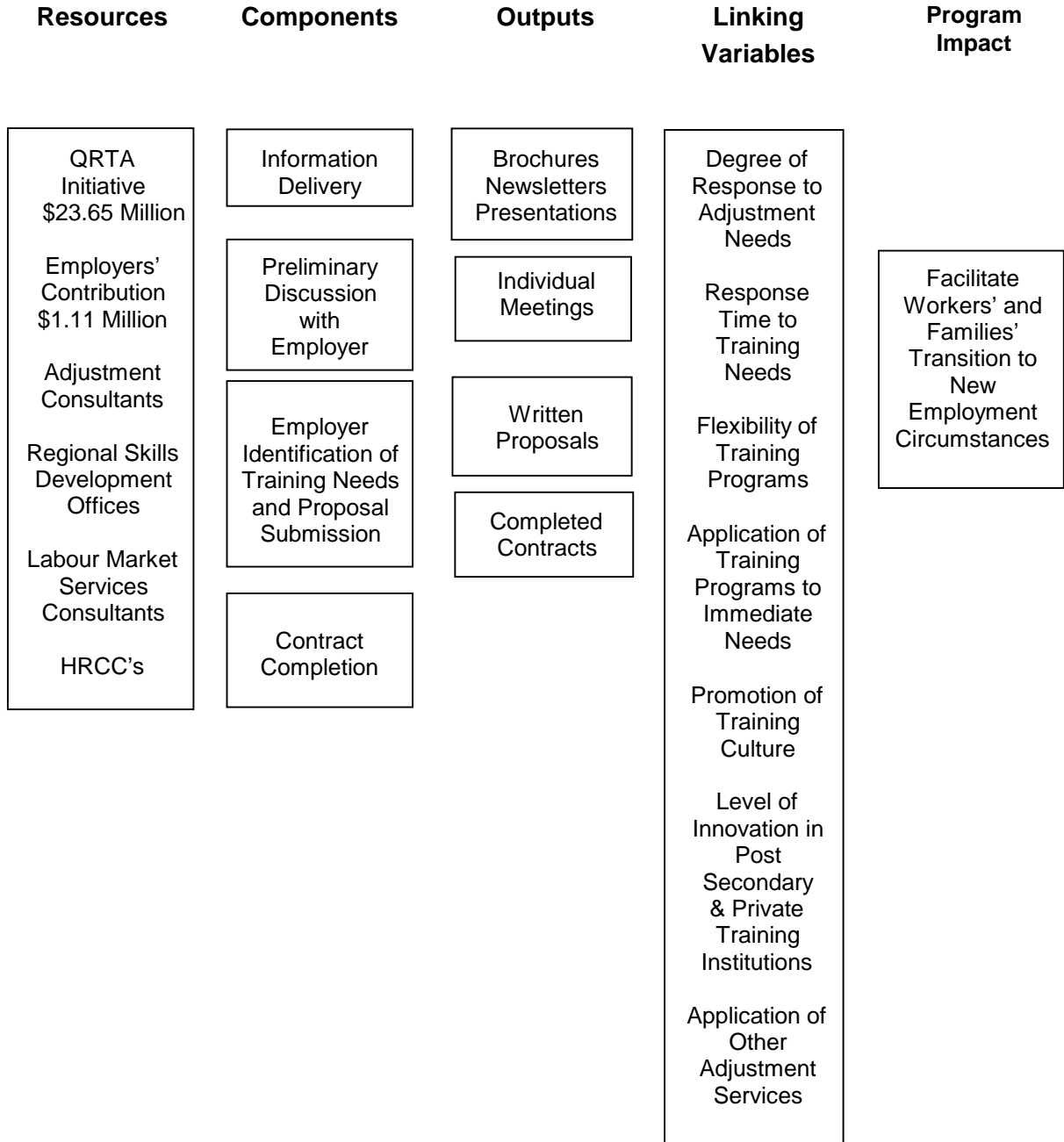
The logic model (Figure 1.1 on page 6) provides a graphic illustration of the elements of the QRTA program. The purpose of the model is to identify the major components of the program and to display the intended relationship of those components to the outcomes that are expected of the program. The linking variables that are included in the logic model describe the information that would serve as an indication that the Program Impact had been achieved.

An examination of the model indicates that the major linkages between the resources, components, outputs and corresponding program impact are sound. The linking variables on the other hand, indicate a potential inconsistency in program design. Six of the seven linking variables are directly related aspects of providing services to the target population. However, the linking variable of “level of innovation in post secondary & private training institutions” is a third level impact. It is considerably more removed from the intended impact of “facilitating workers and families transition to new employment circumstances” than any of the other linking variables that were identified.

In the opinion of the Evaluator, that inconsistency could indicate a significant weakness in program delivery. The extent to which program managers rely on that variable as an indication of program impact, will determine the level of effort that is expended in that area. It is conceivable that a significant level of innovation could be achieved, with little or no impact on the capacity of workers to adjust to new employment circumstances.

FIGURE 1.1: PROGRAM LOGIC MODEL

QUICK RESPONSE TRAINING AND ADJUSTMENT PROGRAM



2.0 METHODOLOGY

2.1 OVERVIEW

An Evaluation Committee was established to guide the planning and conduct of the evaluation. In carrying out this responsibility, the committee reviewed all aspects of the research design, participated in developing the program logic model, reviewed and made recommendations for modifications to the questionnaires, and provided much of the information that was needed to contact potential interview candidates.

The research design included the following components:

- program logic model;
- evaluation criteria;
- data collection plan; and
- interview format and protocol.

2.2 EVALUATION CRITERIA

Evaluation criteria describe those aspects of the program operation that the evaluation is intended to concentrate on. In this case those criteria include program design, program delivery, program outcomes, and implications for future planning. Each of the criteria has been broken down further into a number of questions, the answer to which is provided by one of three types of data that appear in one of five sources. The following description identifies the general question that was posed under each of the criteria and the corresponding indicators that are included within the question.

Criteria: Program Design

1. What were the strengths and weaknesses of the program design?

Indicators:

- degree of congruence regarding the nature of the problem and the intended response;
- degree of co-ordination between funding bodies; and
- fit between available resources and expected level of demand.

Criteria: Program Delivery

2. Was the QRTA program delivered as intended, and if not, why?

Indicators:

- extent to which employers and workers represented the target population;
- level of co-operation between funding bodies; and
- consistency of communication between funding bodies, employers and workers.

3. How efficiently was the program delivered?

Indicators:

- comparison of actual to expected demand;
- timeliness of response; and
- proportion of federal, provincial and employer contributions.

Criteria: Program Outcomes

4. Could the delivery process have been modified to enhance program outcomes?

Indicators:

- level of specification related to expected outcomes;
- identification of performance problems; and
- response to performance problems.

5. Would program outcomes have improved over a longer period of time?

Indicators:

- patterns and trends inherent in outcome data;
- projected need for program services; and
- expected response rate from target population.

Criteria: Implications for Future Programming

6. What factors contributed to the termination of the program as part of the Strategic Initiative?

Indicators:

- priorities in federal and provincial policies;
- program co-ordination and management; and
- perceptions of target population.

7. What can be learned from this Initiative that will improve future efforts?

2.3 DATA COLLECTION PLAN

Data Types

Three types of data were collected during the evaluation. The first is the written historical record. This includes the terms of reference under which the program was intended to be delivered and the descriptions of program delivery. The written historical record was contained in the terms of reference for the program, brochures and information pamphlets describing the program, program files containing requests for service, project proposals, contracts for service, follow up reports and other related correspondence.

The second data type included the perceptions that program managers, consultants, employers and workers representatives had about the program structure and implementation. These perceptions were examined through a series of structured questions that were based on descriptions contained in the historical record. The structured questions were intended to determine the level of understanding regarding the way the program was designed and intended to be carried out.

The third type of data included the considered opinion of the respondents regarding reasons why the program evolved in the manner it did, and what conclusions may be drawn from that experience. This data was solicited through a series of open-ended questions intended to provide an opportunity for the respondents to express their opinion regarding how the program evolved in the manner that it did, and what conclusions may be drawn from that experience.

The second and third data types were found in the interviews that were conducted with respondents in one of the following five categories of Program Managers, Adjustment and Labour Market Services Consultants, Program Service Officers and Employers.

Interviews

There were a total of 22 interviews conducted that included representatives of the managers and directors, and Adjustment Consultants from Ministry of Education, Skills and Training; managers and directors, Program Service Officers and Labour Market Services Consultants from HRDC as well as representatives from four employment settings which had received service under QRTA.

The list of 65 sites that had completed a QRTA contract was examined for sites that met the following criteria:

- services were provided to a substantial number of participants (minimum number selected = seventy five);
- work site locations were representative of major geographical areas of province;
- contracts were jointly funded by MoEST and HRDC;
- services were provided between August 1995 and March 1996; and
- representatives were available to participate in interviews.

Four work sites were selected that matched all of the criteria that have been described. The sample of interview respondents was then built around the selection of work sites. The representatives from MoEST and HRDC included program managers and consultants who had been directly involved in the provision of services to the selected sites, as well as others who had experience with QRTA in other sites. The interview respondents in three of the four sites were representatives of employers who had received services under the QRTA program. The employer in the fourth setting had had a minimal involvement in the application and service delivery process. In that setting, the Steering Committee determined that since the employer was no longer in business, the staff member from the workers' union that had been closely involved with the application and service delivery, was the appropriate person to comment on the process.

The sample size is small in that it contains 6% of the total number of sites in which QRTA services were provided. However, it is a stratified sample that was based on predetermined criteria, held to be reliable descriptors of the universe of QRTA sites. In that regard, although it would not be advisable to make an unqualified generalisation of the findings beyond the sample, they are believed to be a reliable indication of what would be determined if a larger and more comprehensive sample were surveyed.

An introduction letter along with the interview schedule was provided to all candidates prior to their participating in the interviews. The interviews began with an introduction in which the interviewer described the nature of the interview and the expectations regarding length, confidentiality and importance to the evaluation. Following the introduction, the interviewer solicited the interviewee's agreement to proceed and upon receiving that agreement, the formal interview was conducted.

All of the candidates were able to readily recall their involvement with QRTA and in only one situation did the person being interviewed have any difficulty differentiating the previous QRT program from QRTA. Some of the interview candidates in management positions within both MoEST and HRDC expressed the opinion that the extent of their direct involvement with QRTA might limit their capacity to comment on some of the questions in the interview schedule. In those situations, questions that were obviously outside their range of experience were noted and passed over.

One of the candidates refused, without explanation, to answer the question concerning the reasons the QRTA program was terminated. A second candidate offered what was described as an official explanation, but would not provide their own perception of those reasons. Despite these two responses to that one question, in all other situations the interview candidates readily engaged in the interviews with a high level of interest, and freely provided their informed and articulate views of the program and the way in which it was delivered.

All of the interviews were recorded on tape, with the provision of anonymity, and the tapes were then transcribed to files that were used to conduct the analysis. The thematic analysis indicates a high degree of consistency among responses to the structured questions concerning program purpose and procedures. The responses to the open-ended questions indicate a wider range of perceptions but the major themes that are presented appeared readily. Question 18 in the MoEST and HRDC interview schedule was generally not well understood and failed to generate any useful data. All of the other questions in the interview schedule were easily understood and responded to.

Readers can consult the Technical Report for additional information pertaining to the interview protocol and corresponding findings.

3.0 FINDINGS

3.1 PROGRAM DESIGN

This section links the evaluation findings to the major questions of the evaluation. The following findings are based on the responses that have been provided by managers and directors, and Adjustment Consultants from MoEST, Program Service Officers and Labour Market Services Consultants from HRDC, as well as representatives from four employment settings which had received service under QRTA.

Q.1 What were the strengths and weaknesses of the program design?

The problem that the program was intended to address was defined as the need to provide assistance in the form of training in situations where people in the work force were experiencing significant impact from impending layoff, technological change or the demand to adapt to new opportunities in the market place. The nature of the intended response was defined as assistance that was to be provided quickly and with the intention of being a “one time response” to a specific set of circumstances. There is consensus among all those who were interviewed that the problem was correctly defined and the intended response was consistent with the problem.

The strengths that were identified in the program included:

- flexibility to consider a wide range of possible situations that could receive service;
- simplified application procedures that required an employer to submit one proposal that would serve as the basis for negotiation and contracting;
- joint delivery with provincial and federal governments ensuring wider distribution and capitalising on each other’s contacts;
- requirement for the employer to develop and submit a proposal, thereby doing the research that increased the likelihood of their investment in the activity;
- cost shared formula that required a substantial investment on part of employer;
- determination on part of provincial and federal representatives to ensure quick turnaround of inquiries;
- collaboration between Adjustment Consultants (AC) and Labour Market Services (LMS) consultants and between MSTL and HRDC managers in delivering and managing the program;
- limitation of service to work settings that had a definite adjustment component, thereby increasing the likelihood that the intervention would

- have an immediate impact on the capacity of the workers to accommodate the change;
- allocation of signing authority on provincial involvement to the AC who was also the first point of contact; and
- simplicity in the federal process of ensuring accountability for contract performance.

The weaknesses that were identified in the program included:

- confusion about program priorities that resulted from taking the existing QRT program, modifying the objectives, and implementing it as a new program;
- lack of clarification about the services that would be available and expected to be considered under the training thrust, and the services that would be available and expected to be considered under the adjustment thrust;
- lack of preparation in reconciling the administrative procedures of the federal and provincial systems before introducing the program;
- complexity within the HRDC process of securing authorisation on contracts in which the LMS Consultant, as first point of contact, could conduct the initial assessment but had to go to the Human Resources Centre (HRC) for approval;
- confusion within HRDC procedures resulting from HRC and LMS consultants simultaneously serving as first point of contact as well as having the capability to conduct assessment leading to a contract recommendation;
- complexity that resulted from HRDC signing authority being retained by a level other than the first point of contact;
- imbalance in capability of provincial and federal systems to respond to proposals that resulted from signing authority being held at very different levels within the two organisations;
- provision of first right of refusal to post secondary institutions created a time consuming step;
- discrepancy between federal and provincial program goals as indicated below:

Provincial Goals

- quick response, situation specific training
- closer link between colleges & business
- provision of adjustment services

Federal Goals

- quick response, situation specific training
- provision of adjustment services

- the lack of a management reporting format that would provide managers with a good understanding of the impact of the program on the population it was intended to serve.

The level of co-ordination between the funding bodies for the most part was very high. There was also a high level of effort that was extended by the managers and those responsible for direct delivery of the program to accommodate the discrepancies between the federal and provincial administrative systems in order to ensure that the employers and workers received quick and accurate service.

The resources that were available were adequate to meet the initial level of demand and in the opinion of those interviewed, would have continued to be adequate had the program continued.

3.2 PROGRAM DELIVERY

Q.2 Was the QRTA program delivered as intended, and if not, why?

In three of the four contracts that were reviewed, the employers and workers who received the services clearly represented the population that was intended to be served. In the fourth contract the services were provided in a much larger organisation in which Industrial Adjustment Services were already being considered. Some argument could be made that the potential impact of the changing demands in the workplace were somewhat farther removed from the workers in this setting than in the other three settings.

From the employer's perspective, in three of the four situations reviewed, the level of co-operation between funding bodies was very high. In the fourth situation, the communication between the federal and provincial representatives appeared to have broken down completely and the two jurisdictions appeared to not only be operating independently but at some points in conflict with each other. In the view of the consultants, the level of Cupertino was generally very high as well but was not completely free of problems. In two separate instances, consultants indicated that they encountered considerable difficulty in trying to co-ordinate efforts between the LMS consultants, the HRC consultant and the regional signing authority within HRDC. They also indicated that those difficulties caused significant delays in providing service, to the point where one consultant began to avoid introducing the service in prospective situations.

The consistency of communication between all of the relevant parties appeared for the most part to be very satisfactory and was only indicated as being a problem in the employer situation that has been mentioned.

Q.3 How efficiently was the program delivered?

The initial expenditure of funds in the program was considerably less than was expected. The Strategic Initiatives Agreement had provided for a total contribution of \$18.67 million over the three year life of the agreement. However, the total federal/provincial expenditures from September 1995 to end March

1996, was \$856,234. Of that total, the federal government contributed \$310,117 or 36% and the provincial government contributed \$546,117 or 64%. There were a total of 65 agreements established during the same period of which 16 or 25% were jointly funded by both levels of government. Of the balance of 49 projects, 32 of them or, 49% were funded by the province while the balance of 17 agreements or 51%, were funded by the federal government.

The relatively low ratio of interventions that were jointly funded to those interventions that were unilaterally funded by either level of government warrants some additional exploration. In many of the situations in which either level of government was the sole contributor of funds, the total dollar value of the project was relatively low. It was customary in those circumstances for the consultants, in order to simplify the necessary administrative procedures, to come to agreement that either one or the other level of government would provide the funding. The exercise of that level of collaboration is a much stronger indicator of the degree of co-operation exercised between the two levels of government than the ratio itself would indicate.

In the view of the consultants interviewed, the lower than expected levels of program expenditure are reflective of the factors involved in introducing and building a program of this nature into the range of services that can be offered in response to the identification of situations in need. Those factors include the time for employers to become aware of the program, understand the extent of its application to their circumstances, allocate the resources that they will need to contribute and finally, develop a proposal that can be submitted. One of the critical factors that was highlighted by consultants is that employers usually need at least one budget cycle to allocate the resources that they will need to contribute to the project. That typically takes a year to complete.

In situations where the employer was already involved with an Industrial Adjustment Service project, some of those steps would take considerably less time to complete. But, QRTA was not intended to be delivered as an adjunct to Industrial Adjustment Service. Therefore, the majority of potential employment situations would probably require the full time cycle outlined, before they would be in a position to submit a proposal.

The timeliness of response was indicated by all of those interviewed as one of the strengths of QRTA. As a result of the commitment of the federal and provincial representatives, the process of application and contracting was completed well within the time expected and with a minimum of inconvenience to employers.

3.3 PROGRAM OUTCOMES

Q.4 Could the delivery process have been modified to enhance outcomes?

The data indicate that there were no major problems in identifying and accounting for the outcomes that were expected from the service. The performance problems that were identified included one situation in which the employer, due primarily to operational considerations in the workplace, was not able to deliver the complete range of training programs within the agreed upon time. In the second situation the AC became aware that the workers were having difficulty grasping the content of the training. In both cases, the situation was easily identified and resolved through consultation between the federal and provincial representatives and the employer.

Q.5 Would program outcomes have improved over a longer period of time?

There is strong indication from two sources that program outcomes would have improved over time. In the first instance, a review of the agreement dates indicates that 31% of the total agreements were secured in the six months between August and December of 1995. By March of 1996, the agreement rate had increased almost five fold from approximately 3.5 per month in the first six months, to 15 agreements per month in the last three months of the program. In addition, the development and implementation of the joint application and contracting format is likely to have resolved many of the internal administrative problems that were encountered by federal and provincial representatives.

The interview data also supports the position that the program outcomes would have improved over time. Those employer and work force representatives that were interviewed were unanimous in their support and high regard for the objectives of the program, the manner in which it was delivered, its value to the employer and, in particular, its immediate value to the employees. The interviews with consultants also indicates their view that there is a continued need for a program of this nature. Many of them reported that they continued to receive numerous inquiries about the program long after it had been terminated.

3.4 IMPLICATIONS FOR FUTURE PROGRAMMING

Q.6 What factors contributed to the termination of the program as part of Strategic Initiatives?

A number of factors were identified in determining the reasons why the program was terminated. The most common factor cited was the budgetary pressures that the province was faced with at the time. The majority view of both federal and provincial representatives is that QRTA was seen as a discretionary program that was not part of the ministry's base budget priorities. As a result, it could be terminated more readily than other kinds of programming that were incorporated into its base budgets.

A second factor that has been identified is the perception that the slower than expected uptake in allocating funds under the program was an indication that the program was not seen as valuable in the target population, and therefore could be terminated without a major impact on that population. That perception was held primarily by some of the federal and provincial managers who had budgetary responsibility but were not directly involved in the management or delivery of the service.

The third factor that has been identified involves the divergence of interest between the goal of providing workplace training and that of providing workplace adjustment services. HRDC had been for some time getting out of the business of funding work based training, concentrating instead on the provision of adjustment services. Representatives from HRDC supported the value of training, but the adjustment aspect of QRTA was definitely the more important of the two. Although it is acknowledged that those adjustment services were not provided under QRTA, they remained a high priority within HRDC objectives.

The MSTL managers on the other hand, held that the employers, under the terms of reference for the program, had first to approach the colleges and attempt to negotiate the delivery of training from them. If it was determined that the college was not able to provide the service under the expected conditions, then other training options could be considered.

The HRDC managers did not share the MSTL managers' view of the role of the colleges in the application process. The HRDC managers saw the requirement to approach the colleges as giving them the first right of refusal on the delivery of training. In their view, most of the proposals that were received from the colleges were significantly more expensive than those received from other sources, and were less suited to the particular needs of the situation that existed in that setting. HRDC managers tended to view the mandatory involvement of colleges as a needless and time consuming step that slowed down the capacity to respond quickly to the situation.

In the view of some of the MSTL consultants, the post secondary institutions were not happy with the process either. Many of the training contracts were being awarded to providers other than the post secondary institutions for the reasons that have been cited. Even though QRTA was a separate program with a distinct focus, it appears to have suffered in perception from not being sufficiently differentiated from its predecessor.

With the lack of a strong adjustment focus, and a less than expected reliance on post secondary institutions in the provision of workplace-based training, the program may have begun to appear as strictly a training initiative that was acting as a subsidy to business. This perception is incompatible with the program's original intentions.

4.0 CONCLUSIONS

4.1 PROGRAM DESIGN AND DELIVERY

There is consensus among all those who were interviewed that the problem which gave rise to the QRTA program was correctly defined and the intended response was consistent with the problem.

The program and administrative co-ordination between the funding bodies for the most part was consistent.

Program managers and those responsible for direct delivery of the program successfully accommodated the discrepancies between the federal and provincial administrative systems. As a result of that commitment, the process of application and contracting was completed well within the time expected and with a minimum of inconvenience to employers.

The resources that were available were adequate to meet the initial level of demand and would very likely have continued to be adequate, had the program continued operating.

In three of the four contracts that were reviewed, the employers and workers did clearly represent the population that was intended to be served. In the fourth contract, it could be argued that those workers were less likely to experience immediate negative impact from workplace changes.

The levels of expenditure that were generated in the early stages of the program were much lower than that expected by senior managers in MoEST and HRDC.

The lower than expected levels of program expenditure are very likely to be reflective of the factors such as the time employers need to :

- become aware of the program;
- understand the extent of its application to their circumstances;
- allocate the resources that they will need to contribute; and
- develop a proposal that can be submitted.

A program of this nature needs to be operated for at least one full year that includes a complete business budget cycle, before any reliable indication of its level of acceptance in the target population can be determined.

4.2 PROGRAM OUTCOMES

Program outcomes are very likely to have improved over time. Employer and work force representatives were unanimous in their support and high regard for the objectives of the program, the manner in which it was delivered, its value to the employer and in particular, its immediate value to the employees. The interviews with consultants also indicates their view that there is a continued need for a program of this nature. Many of them reported that they continued to receive numerous inquiries about the program long after it had been terminated.

4.3 IMPLICATIONS FOR THE FUTURE

There was an ongoing, unresolved divergence of interest between the two goals of providing workplace-based training and that of providing workplace adjustment services. The province had an interest in promoting closer links between post secondary institutions as providers of training and those employers who were engaged in the provision of workplace-based training. That interest appears to have been a carry over from QRT, the program previously operated by the Post Secondary Division of MSTL. On the other hand, while HRDC supported the value of training, it did not hold the same interest as the province in the role post secondary institutions played in the delivery process. HRDC was far more concerned with the provision of broader adjustment related services.

Both parties became less than satisfied with those particular aspects of the program outcomes. With the lack of a strong adjustment focus, and a less than expected reliance on post secondary institutions in the provision of workplace-based training, the program began to appear as strictly a training initiative that was acting as a subsidy to business. This perception is incompatible with the program's original intentions.

In the face of the demands of realigning priorities and the pressures of budget restrictions within the provincial government, the program failed to secure the internal support it needed. The province subsequently withdrew its involvement. With the province having withdrawn, the federal government found itself as the sole provider of a joint service and consequently terminated its involvement as well.

Great care should be taken in a situation where an existing program is being considered as a vehicle to deliver a modified form of service. The goals of the program, as well as the service delivery mechanism, need to be closely examined for any weakness or inconsistency in design. The procedures as well, need to be subjected to close scrutiny and be clearly formulated before the program is considered to be ready for delivery. Such care is needed in order to avoid having the expectations and assumptions that accumulated with the delivery of the program in its first form being carried over to the revised format.

QUICK RESPONSE TRAINING AND ADJUSTMENT (QRTA)

Technical Report

**Evaluation and Data Development
Strategic Policy
Human Resources Development Canada
and
British Columbia Ministry of Education, Skills and Training**

February 1998

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APPENDIX A

MSTL AND HRDC STAFF MEMBERS INTERVIEW

INTERVIEW PROTOCOL AND SCHEDULE

MSTL AND HRDC

STAFF MEMBERS INTERVIEW

Interview Protocol

Hello, my name is _____ and I am calling on behalf of Beaubear Management Consulting Ltd. We have been engaged by the Ministry of Education, Skills and Training in conjunction with Human Resources Development Canada, to conduct an evaluation of the Quick Response Training and Adjustment Program. I believe you may have by now received the letter introducing the evaluation and indicating that we would be calling to ask you some questions about your perceptions of the program.

I have a series of questions about aspects of the Quick Response Training and Adjustment Program that will take approximately thirty minutes to complete. The information that you provide is important to our evaluation of the program. It will be combined with that of other people we are interviewing and will be reported only in aggregate. No specific comments will be attributed to any one individual and in that way, the information that you provide will remain confidential.

Are you prepared to conduct the interview at this time?

Yes

No

If Yes, continue to interview.

If No: What would be a good time to call back?

This evaluation is focused on the period between August of 1995 and March of 1996 when the program was jointly administered by the Adjustment Programs Branch, Skills Development Division of the Ministry of Skills Training and Labour and Human Resources Development Canada.

MSTL AND HRDC

STAFF MEMBERS INTERVIEW

Interview Schedule

1. What, in your opinion, was the purpose of the QRTA Program?
2. What procedures did an employer need to follow in order to receive funding under the program?
3. In your opinion, how well did those procedures work?
4. What was the protocol for co-ordinating responsibilities between Human Resources Development Canada and the Ministry of Skills Training and Labour?
5. Did the program address the problem for which it was intended?
6. To what extent did the resources that were available match the need for services?
7. Were those who received funding under the program representative of those it was intended to serve?
8. How would you describe the consistency of communication between the two levels of government that were jointly administering the program?
9. How would you describe the consistency of communication between the two levels of government that were jointly administering the program and the potential candidates?
10. How did the actual level of service provided under the QRTA Program compare with the expected level of demand?
11. Were the aspects of the program such as application, contracting and funding provided within the time that was expected?
12. Was the proportion of federal and provincial funds that were spent in the QRTA Program consistent with expectations?
13. Were the objectives of the contracts for service described in sufficient detail to determine whether or not they had been accomplished?

14. Were you aware of any performance related problems that occurred in carrying out contracts?

If Yes, go to question 15.

If No, go to question 16.
15. How were those problems addressed?
16. In your opinion, was there a continued need for the program?

If Yes, go to question 17.

If No, go to question 18.
17. Please describe your perception of that level of need for the program.
18. How would you describe the response that was expected from those the program was intended to serve?
19. What, in your opinion, were the factors that led to the termination of the program?
20. What, in your opinion, can be learned from this Initiative that will improve future efforts?

APPENDIX B

**EMPLOYERS AND WORK FORCE
REPRESENTATIVES**

INTERVIEW PROTOCOL AND SCHEDULE

EMPLOYERS AND WORK FORCE REPRESENTATIVES

Interview Protocol

Hello, my name is _____ and I am calling on behalf of Beaubear Management Consulting Ltd. We have been engaged by the Ministry of Education, Skills and Training in conjunction with Human Resources Development Canada to conduct an evaluation of the Quick Response Training and Adjustment Program. I believe you may have by now received the letter introducing the evaluation and indicating that we would be calling to ask you some questions about your perceptions of the program.

I have a series of questions about aspects of the Quick Response Training and Adjustment Program that will take approximately thirty minutes to complete. The information that you provide is important to our evaluation of the program. It will be combined with that of other people we are interviewing and will be reported only in aggregate. No specific comments will be attributed to any one individual and in that way, the information that you provide will remain confidential.

Are you prepared to conduct the interview at this time?

Yes

No

If Yes, continue to interview.

If No: What would be a good time to call back?

This evaluation is focused on the period between August of 1995 and March of 1996 when the program was jointly administered by the Adjustment Programs Branch, Skills Development Division of the Ministry of Skills Training and Labour and Human Resources Development Canada.

EMPLOYERS AND WORK FORCE REPRESENTATIVES

Interview Schedule

1. What, in your opinion, was the purpose of the QRTA Program?
2. What procedures did an employer need to follow in order to receive funding under the program?
3. In your opinion, how well did those procedures work?
4. How would describe the consistency of communication between the two levels of government that were jointly administering the program and the potential candidates?
5. Were the aspects of the program such as application, contracting and funding provided within the time that was expected?
6. Were the objectives of the contracts for service described in sufficient detail to determine whether or not they had been accomplished?
7. Were you aware of any performance related problems that occurred in carrying out contracts?

If Yes, go to question 8.

If No, go to question 9.
8. How were those problems addressed?
9. In your opinion, was there a continued need for the program?

If Yes, go to question 10.

If No, go to question 11.
10. Please describe your perception of that level of need for the program.
11. To what extent did the program provide what you expected of it ?
12. Did the services provided under the program meet your needs at the time?

13. What, in your opinion, can be learned from this Initiative that will improve future efforts?

APPENDIX C

SUMMARY OF INTERVIEW RESPONSES

MANAGERS/DIRECTORS

1. What, in your opinion, was the purpose of the QRTA Program?

The majority of MoEST respondents indicated that the primary purpose of the QRTA program was to provide assistance in the form of training in situations where people in the work force were experiencing significant impact from impending layoff, technological change or the demand to adapt to new opportunities in the marketplace. The assistance was to be provided quickly and was intended to be a one time response to a specific set of circumstances.

The secondary purpose that was indicated was the attempt to encourage a closer link between the training needs of employers and the capacity of post secondary institutions to respond to those specific training situations.

A minority of MSTL managers also indicated that a third purpose was to provide additional adjustment related services to families of workers who were experiencing the impact of workplace changes.

HRDC Managers indicated that the purpose of the program was to respond quickly to the need for training in a workplace that was having to adjust to major changes such as restructuring or job loss. The program was intended to be applied to the immediate needs of workers as well as the relevant needs of their families in the process of adjusting to the changes. The program was also intended to stabilise the employment situation by enabling workers to take on new or different responsibilities or to move to new employment in a new setting.

2. What procedures did an employer need to follow in order to receive funding under the program?

The majority of managers indicated that the employers were required to identify their needs in the form of a proposal and to present the proposal to the Adjustment Consultant (AC) in their area. In the process of developing the proposal, the employer was required to contact the relevant post secondary education institution in their area to determine if they were interested and could provide the training that was being contemplated. If the institution was not in a position to do so, the employer could then proceed to secure the training from alternative sources in the private sector.

The AC would then provide a copy of the proposal to their corresponding HRDC counterpart and they would then jointly proceed to assess the merits of the proposal. If the proposal met the criteria for funding under the program, a separate contract for service was established with either the provincial or federal government or both.

Once the contract had been established, the employer was provided with the information from both levels of government that would be needed to account for the service that was delivered. They were expected to fill in the two separate forms and submit them to the appropriate level of government.

Managers indicated that a joint application form and corresponding contracting procedures had been developed during the life of the program but were not able to be introduced until the spring of 1996. Shortly after this the program was changed back to QRT, transferred to Post Secondary Division and the province withdrew from the aspect of joint delivery that had characterised QRTA.

One person indicated the need of the province to have the employer contact the colleges giving them first option to bid on the project before pursuing any other avenues to acquire the training.

3. In your opinion, how well did those procedures work?

The opinion of managers indicates that for the most part, they believed that the procedures worked very well. This is despite some considerable effort that was required at the beginning of the program to establish clear expectations of how services would be co-ordinated. It was established that either level of government could be the first point of contact and that, upon receiving a request for consideration from an employer, either the federal or provincial representative would inform their counterpart and continue to co-ordinate efforts over the duration of the contract.

The managers also indicated that at their level they had already established a good working relationship between the two levels of government in operating the Industrial Adjustment Service. This relationship greatly facilitated their capacity to cooperate readily on this program.

The managers were very well aware of the discrepancy between the federal objectives of the program and those of the provincial government. HRDC placed a far greater emphasis on the adjustment aspect of the intended thrust of the program and although they acknowledge that those services were not provided under the QRTA, they remained a high priority in the objectives.

The MSTL managers held that the employers, under the terms of reference for the program, were first to approach the colleges and attempt to negotiate the delivery of training from them. If it was determined that the college was not able to provide the service under the expected conditions, then other training options could be considered.

The HRDC managers did not share the MSTL managers' view of the role of the colleges in the application process. The HRDC managers saw the requirement to approach the colleges as giving them the first right of refusal on the delivery of training. In their view, most of the proposals that were received from the colleges were significantly more expensive than those received from other sources and were less suited to the particular needs of the situation that existed in that setting. HRDC managers tended to view the mandatory involvement of colleges as a needless and time consuming step that slowed down the capacity to respond quickly to the situation.

The general opinion is that the procedures worked well from the point of view of the employers but internally there were some significant problems. The local HRCC offices had, prior to the introduction of QRTA, been used to receiving and managing requests for training assistance on their own. With the introduction of QRTA they either had to check with the LMS Consultant before proceeding or they would have to respond to a new referral that the LMS Consultant had been negotiating before contacting them. Since the signing authority for contracts remained with the HRCC, the amount of co-ordination that was required presented some difficulty for some of the LMS Consultants and HRCC offices.

Despite the difficulties that were identified, there was a will to make the system work and in the opinion of the managers, the people who were delivering the program were successful in accomplishing that.

4. What was the protocol for co-ordinating responsibilities between Human Resources Development Canada and the Ministry of Skills Training and Labour?

The protocol for co-ordinating responsibilities indicated that the first person to receive the request was to immediately provide a copy of the request to their counterpart in the other level of government and then to jointly consider the merits of the proposal. If the proposal met the criteria from the perspectives of both governments, a separate contract was established between the two levels of government and the employer. The proportion of funds to be contributed by each level of government was then established and reflected in the relevant contract.

In the case of the provincial government, the Adjustment Consultant who received the proposal had signing authority and could enter into a contract on behalf of the provincial government. In the case of HRDC, the proposal could be received by the local HRCC, or the LMS Consultant. If the proposal was

received first by the LMS Consultant, they could review it on its merits and carry out the liaison that was needed with their provincial counterpart. If that consultation indicated that the proposal met the criteria from the perspective of either the federal or both levels of government, because the LMS Consultant did not have signing authority, they would have to submit it to the HRCC with a recommendation for funding. If the local HRCC manager concurred with the recommendation, the proposal was approved, a contract was established and was then administered from that local HRCC office.

If the proposal came first to the local HRCC, the LMS Consultant was informed of the contact and began the liaison with their provincial counterpart and the process continued as described.

At the program level, the protocol was simple in that the first person to receive the request informed their counterparts. From that point on, they proceeded in a collaborative fashion to consider the merits of the proposal and ultimately, if it was accepted, to establish a contract for service.

At the managers level, the protocol was also simple in that the intent of the program seemed to be clear, the funds to operate it were there and the procedures were either in place or were being developed.

At the executive level, the co-ordination of responsibilities was chaotic in that the program went through three distinct stages:

Stage 1: The province operated QRT independently and targeted the program to training provided by the post secondary institutions. There was no adjustment focus.

Stage 2: QRT was transferred in the middle of a fiscal year to a different division within the ministry, given an adjustment focus, renamed QRTA and was to be operated jointly by the federal and provincial governments.

Stage 3: QRTA was transferred back to the original division, the adjustment focus was lost, and the program was subsequently terminated.

5. Did the program address the problem for which it was intended?

In the view of the MSTL managers, the program was beginning to address the problem for which it was intended, but the extent to which it was able to complete the objective was severely constrained by several factors.

The first of those factors was the fact that the program was transferred on short notice to the Skills Development Division in the middle of a fiscal year. This provided very little time for preparation to incorporate the program into the procedures within the Division. The fact that the program was intended to

operate jointly with the federal government was a second factor that required some time in order to develop the understanding and means to effect the joint delivery. In the view of MSTL managers, the joint procedures that were being developed to co-ordinate the service delivery were just beginning to get established when the program was suddenly transferred out of the Division very early in the next fiscal year. Within months of that transfer, the program was cancelled entirely.

Since the training that was being provided under the program was being delivered to employees in settings that were dealing with adjustment issues, the program appeared to be addressing the intended need. However, the program failed to develop the broader adjustment application to families and community that was intended.

6. To what extent did the resources that were available match the need for services?

The initial demand for funds under the program was not as high as had been expected. Employers generally need time to learn about a program, understand the nature of the program and how it may fit a current or future need and finally, develop a budget to fund their portion in a shared cost structure such as QRTA. These steps may take as long as a year to develop. Due to the factors associated with the time delay in employers becoming aware of the program and building the capacity to make use of it, the program distributed significantly less funds than was anticipated.

7. Were those who received funding under the program representative of those it was intended to serve?

The opinion of MSTL managers is that the program did provide services to those for whom it was intended.

The HRDC managers indicated that in some instances the services that were provided were too narrowly focused on training and that the adjustment services that were envisioned to be part of the program tended not to be included in the delivery.

In large measure, it appears as if the program did assist employers with workplace adjustment. However, the program tended to be applied to efforts to expand the employment capacity or to prevent impending layoffs to a greater extent than situations in which workers had already lost their jobs. This kind of intervention, although acknowledged to be valuable and within the program criteria, tended to be somewhat less critical or intensive than what was envisioned when the program was developed.

8. How would you describe the consistency of communication between the two levels of government that were jointly administering the program?

The majority of both HRDC and MSTL managers indicated that the consistency of communication at that level between governments was very good. They also indicated that in their opinion generally the communication in the field between Consultants and employers was very consistent as well.

The minority view was that the communication suffered because the federal government had more of an interest in adjustment services while the provincial government placed more emphasis on training, which led to an inconsistency in communication.

9. How would you describe the consistency of communication between the two levels of government that were jointly administering the program and the potential candidates?

Both HRDC and MSTL managers indicated that the communication between employers and consultants from the two levels of government was also very consistent.

10. How did the actual level of service provided under the QRTA Program compare with the expected level of demand ?

The overall level of program activity, as measured by the amount of federal and provincial funds allocated to projects approved under QRTA, was significantly less than what was expected. There was some concern among senior managers that the program was not being marketed properly, thereby causing the delay in uptake. The understanding on the part of the consultants who were providing the direct service was that the slow uptake in funds was caused primarily by the time required for employers to become familiar with the program, understand its possible application to their situation and plan for the expenditure that would be required of them.

One of the major costs to employers in responding to this type of need is that of covering the salaries for workers attending training programs. This type of cost was not covered under QRTA and resulted in a number of employers choosing not to pursue the process any further.

11. Were the aspects of the program such as application, contracting and funding provided within the time that was expected?

The process of contracting for services was carried out well within the time that was expected. Proposals were considered as soon as they were received and if they met the criteria, agreements to proceed with a proposal could be reached quickly. This could be followed in turn by the development of a contract and its subsequent delivery.

Those aspects of the program were delivered within the time that was expected, despite the significant obstacles that were presented by the level of incompatibility between the federal and provincial administrative systems. The

different administrative procedures used by the federal and provincial governments resulted in there being two separate streams of contract, claim and reporting procedures. In order to reduce the resulting complication and duplication, a joint application form and corresponding process was developed. However, the joint application form was never fully implemented before the program was transferred to another division in the provincial government.

12. Was the proportion of federal and provincial funds that were spent in the QRTA Program consistent with expectations?

The perception among both HRDC and MSTL managers was that the proportion of federal and provincial funds contributed were roughly equal over the total life of the program as QRTA. The province tended to provide more funding than the federal government in the early stages as a joint program. For several months after the province withdrew from the program, the federal government continued to establish unilateral contracts for service under QRTA. By November of 1996, the overall contribution made by both HRDC and MSTL were roughly equivalent.

13. Were the objectives of the contracts for service described in sufficient detail to determine whether or not they had been accomplished?

There was no problem defining the objectives of the contracts since they were always set up to provide specific training services in specific settings over a pre-determined length of time.

14. Were you aware of any performance related problems that occurred in carrying out contracts?

Managers from HRDC and MSTL were not aware of any significant performance related problems. There was one situation in which the training was provided but had to be delayed for various reasons. This resulted in some administrative problems, but the expectations of the contract were met in the end.

15. How were those problems addressed?

This question was not relevant given the previous response.

16. In your opinion, was there a continued need for the program?

Managers indicated that there is a continued need for a program of this type that has the capacity to respond quickly to a specific set of circumstances and can be jointly delivered by both levels of government.

The factors that those responsible for delivering the service cited as indicators of a continued need included the increasing number of work sites that are facing significant challenges in adjusting to changing economic and market conditions, the continued number of inquiries from employers for assistance in responding to

challenges, as well as the benefits of assisting employers to invest in training for employees.

17. Please describe your perception of that level of need for the program.

A variety of opinions were expressed in response to this question and are presented below.

HRDC had for some time been withdrawing from involvement in employer based training and its entry into the QRTA program was premised on its capacity to provide broader and more extensive adjustment services. However, QRTA did not provide the level of services that was expected, and as the program continued, the discrepancy between the expectations and the actual delivery of services became greater. As a result of this tension, it became increasingly difficult from the HRDC perspective to justify continuing the program.

The perception is that the need is significant when it arises in a specific setting. It is not seen as a pervasive need, but rather one that is critical when the situation arises. In those circumstances it demands a response that is specific to that situation and can be put in place quickly.

There is a perceived need for direct intervention in situations in which a number of workers in a setting are facing layoff or the impending threat of layoff. The current system places the responsibility on the individual to seek out the potential forms of assistance and to go through the relevant application procedure.

However, there are several weaknesses in this approach. First of all, a system that is based on the individual response is not likely to look for, or be able to recognise or evaluate the potential skill transfer that has been acquired in a workplace. Secondly, the individual, for a variety of reasons, may or may not pursue the research or application process in an attempt to capitalise on that potential skill transfer. Finally, if the individual does conduct the research and make an application, there is no guarantee that the assistance that is required will be provided. In the absence of a program with a mandate to seek and respond to the potential in workplace adjustments it is unlikely, given the hurdles in the system, that the individual and in turn the work force in general will have the capability to capitalise on such aspects as potential skill transfer.

18. How would you describe the response that was expected from those the program was intended to serve?

This question failed to generate any significant responses.

19. What, in your opinion, were the factors that led to the termination of the program?

The provincial government in August of 1996 was facing a budget shortfall and was looking for places to reduce expenditures.

The QRTA program was perceived as a subsidy to business and therefore not compatible with the original intentions of the program.

With the transfer back to the Post Secondary Division, the program reverted to its original provincial mandate under QRT in which it responded to requests for funding to training programs that were submitted by colleges and institutions. This approach was perceived by HRDC as incompatible with the terms under which QRTA was established as a joint initiative between the federal and provincial governments. In the absence of any interest on the part of Post Secondary Education Division in co-operating with HRDC on joint delivery of services, the federal government continued unilaterally funding a number of successive projects. In November of 1996, the decision was made to terminate the program completely.

The program was perceived to have become a pure training subsidy with no substantial adjustment focus that was not meeting the objectives of the strategic initiatives and was therefore terminated.

20. What, in your opinion, can be learned from this Initiative that will improve future efforts?

In the opinion of some managers, a joint program needs to have more development time allotted in order to make sure that all of the objectives are clearly understood, that the procedures are clearly laid out and support the achievement of the objectives, that the body receiving service only has to deal with one representative regardless of whether or not that is on a provincial or federal basis; and, that sufficient time is allowed for the program to be presented to potential candidates and for them to make preparation to use the program.

The concept and program design need to be developed from the beginning as a joint effort on the part of both levels of government.

Taking on an existing program and attempting to modify it to suit a new mandate is fraught with problems and is not likely to be successful.

The program design needs to be fully integrated with the concept and objectives.

The expectations and methods of marketing, promoting and delivering the program need to be developed jointly and continued attention needs to be invested in ensuring that both joint and unilateral efforts are consistent with the original expectations and methods.

The introduction of preferential treatment for colleges in the application process was a unilateral decision on the part of the province that did not have the support of the federal government representatives. In the view of the federal members of the management committee, this resulted in a diversion from the original objectives that in turn, contributed in a significant way to the fact that the program was unable to fulfil the adjustment aspect of its mandate.

ADJUSTMENT AND LABOUR MARKET SERVICES CONSULTANTS

1. What, in your opinion, was the purpose of the QRTA program?

The QRTA program was intended primarily to provide a means of responding to the demands of work force adjustment, and secondly, to encourage and assist employers to invest in training as well as providing a means and incentive for post secondary institutions to enhance their capacity to provide workplace-based training.

2. What procedures did an employer need to follow in order to receive funding under the program?

Employers needed to submit a proposal explaining the need for service and the specific nature of the training that would be applied. An application form was available but was not necessarily required as a contract could be developed on the basis of the proposal submitted by the employer.

One inquiry with either an Adjustment Consultant or a Labour Market Consultant was all that was necessary as they would take responsibility for co-ordinating the process from that contact.

The majority view is that the contact with HRDC developed as a result of their being involved in the Industrial Adjustment Service. The procedure could include the completion of a formal application or the development of a proposal that was submitted to either the LMS Consultant or the local HRC office. Deliberations then took place between HRDC, as represented by either the LMS Consultant or the local HRC office, and their provincial counterpart, the AC from MSTL. The local HRC needed to approve all proposals which were then were then submitted to the regional level for final approval.

3. In your opinion, how well did those procedures work?

Generally the procedures worked well, with some qualifications.

The task of co-ordinating service delivery with the LMS Consultants and the federal HRDC procedures was so complicated that it led some Adjustment Consultants to avoid using the program.

The program was constrained to some extent by the emphasis that was placed on training and by the kind of training that could be funded, in that it had to be workplace training to qualify.

The requirement for the employer to contribute one half of the costs dissuaded some employers from following through with the program.

In many cases the post secondary institutions were not able to respond adequately to the training needs of the employer. After some delay the contract for service was eventually delivered by an alternative institution, usually from the private sector.

The difference between the federal and provincial perspectives centred around the role of training versus adjustment in the program. The federal government placed a very high priority on the adjustment aspect of the intervention, while the training was seen really to be only a means or a vehicle in the process of adjustment. Whereas in the province's case, they were much more interested in trying to get a training culture developed within the labour market and additionally, wanted to get the colleges to be able to respond quickly and flexibly to the needs that the employer in the labour market had identified.

4. What was the protocol for co-ordinating responsibilities between Human Resources Development Canada and the Ministry of Skills Training and Labour?

LMS and AC Consultants would take responsibility for ensuring that their counterpart was informed of the proposal. In some cases funding would be undertaken jointly and in others it was unilateral. AC Consultants had signing authority on MSTL contracts, while HRCC offices held signing authority with HRDC.

5. Did the program address the problem for which it was intended?

Initial indications are that the program was beginning to address the problem for which it was intended but that it was terminated as QRTA before a clear conclusion could be drawn about success or failure in this regard. It was generally seen as a program that, despite the difficulties involved, was meeting the need for which it was intended.

6. To what extent did the resources that were available match the need for services?

Opinions in response to this question were varied.

Start up problems resulted in lower than expected expenditures.

Premature termination as QRTA meant that there was not adequate time available to properly allocate the existing funds.

The resources that were available in general met the need for services.

7. Were those who received funding under the program representative of those it was intended to serve?

Opinions in response to this question were varied.

In some cases employers received funding for training that could be considered marginal in terms of the criteria set for QRTA.

Others confirmed that the funds were spent on those situations that met the program criteria.

The premature termination limited its ability to accurately target the intended population.

The right of first refusal that was provided to colleges tended to favour the large industries with large numbers of trainees that already had a working relationship with the colleges. It also tended to discourage small to medium sized businesses with lower numbers of trainees which the colleges were much less interested in serving. As a result, most of the funds ended up going to large industries.

From the provincial perspective, the program may not have met the secondary objective of bringing the post secondary institutions more fully into the provision of specific workplace-based training.

8. How would you describe the consistency of communication between the two levels of government that were jointly administering the program?

Communication between AC and LMS consultants was fine, but communication within HRDC seemed to be much more difficult. The HRC offices did not seem to understand the nature of the program, or who it was intended to serve. As a result, they tended to present obstacles that made the process of reaching agreement much more complicated and drawn out than was necessary. Overall communication for the most part was consistent, except in marginal situations where there may not have been consensus on whether or not a particular proposal met the program criteria.

9. How would you describe the consistency of communication between the two levels of government that were jointly administering the program and the potential candidates?

Communication between the two levels of government and employers was consistent and generally free from problems.

10. How did the actual level of service provided under the QRTA program compare with the expected level of demand?

The start up problems in QRTA resulted in the service level falling short of the expected demand.

The LMS Consultants tended to see QRTA almost as an extension of the type of services that were being provided under the auspices of the Industrial Adjustment Service. As a result, they tended to mention the program for discussions that were being held within that context, rather than marketing the program as a stand alone service. In addition, the view of LMS Consultants seems to be that employers need a substantial amount of time to understand the program, determine the extent of its fit with their needs and, in the case of a joint funding venture such as QRTA, develop the resources to apply to the situation.

As a result of these factors it would take some time to build a steady stream of funded projects. However, provincial responsibility for the program was transferred approximately eight months after its commencement and subsequently terminated within months of that transfer, thereby not allowing sufficient time to build the expected volume of active projects.

11. Were the aspects of the program such as application, contracting, and funding provided within the time that was expected?

The existence of two separate sets of administrative procedures in the federal and provincial governments inevitably made the internal administration more difficult. However, that did not in any large measure impair the ability to get a quick response back to the employer.

12. Was the proportion of federal and provincial funds that were spent in the QRTA program consistent with expectations?

Over the life of program, the funds contributed by each level of government were seen to be roughly equal.

13. Were the objectives of the contracts for service described in sufficient detail to determine whether or not they had been accomplished?

No problems were identified in this area.

14. Were you aware of any performance related problems that occurred in carrying out contracts?

Generally, no significant performance related problems were identified, but there were several minor issues that did develop.

On one occasion, the training that was provided was at too high a level for the learners to grasp.

Some communication problems occurred between MSTL and HRDC staff and between MSTL staff and the colleges.

In a few situations, operational considerations of the employer caused some delay in the delivery of some training, but in the end the expectations were met.

15. How were those problems addressed?

The level of training problem was identified first by the learners and then subsequently brought to the attention of a team of trainers, the AC and LMS Consultants and the employer. The problem was dealt with effectively.

16. In your opinion, was there a continued need for the program?

17. Please describe your perception of that level of need for the program.

There is a perception that a definite need for a program such as QRTA does exist, but that the need is not a pervasive one. It is rather a need to have a capacity to respond to specific situations as they arise, relying to a large extent on the business community to identify the need.

A minority view holds that the type of need that is perceived has two qualifications:

1. that it is targeted specifically to those work sites attempting to meet the challenges of changing environments. Such a program should be focused on serving the work place, not on trying to involve the colleges in industrial training; and
2. that it is targeted specifically to small businesses of a limited size and set up to accommodate their needs.

18. How would you describe the response that was expected from those the program was intended to serve?

Aside from the opinion that small to medium sized businesses experienced the need to consult first with the colleges as a needless and time consuming process, the program was perceived as providing good value and being able to provide the service with a minimum of bureaucracy.

The learners in some situations had difficulty understanding who was providing the training, why they were taking it and what they could expect to do with it.

Those businesses that responded had legitimate needs and to a large extent, the program provided the capability to meet the needs in a manner that was well suited to the circumstances in that workplace. There is a perception as well that there are more workplaces that could benefit from the services of such a program but they have not as yet been able to be reached.

19. What, in your opinion, were the factors that led to the termination of the program?

Two Adjustment Consultants refused to answer the question. One indicated that they had been informed that it was as a result of “a reordering of priorities within government” and would provide no further comment to the question.

In one situation, the internal administrative problems that were encountered in co-ordinating joint service delivery were enough to discourage that Adjustment Consultant from using the program.

HRDC, prior to the implementation of QRTA, had been pulling back from involvement in workplace-based training and when the province withdrew from the partnership program, HRDC saw no point in continuing without the partner.

The expectations of the program were unrealistic. There was no understanding on the part of those who developed the program that employers need six to twelve months to understand the nature and application of the program and then develop the resources that they need to apply to the situation.

The uptake of the funds was slower than expected and this was interpreted by senior managers as an indication that the level of need did not justify funding a program of this nature.

The projects that were being developed were not necessarily meeting MoEST's desire to improve the credibility of the colleges with industry. In fact, in many of the instances when industry, management and labour came together, the first thing industry stated was that they did not want to deal with the colleges. They wanted rather to deal either with the private sector companies or with the new skill centres.

The federal government at this time was moving all of its labour market programs into a partnership format and, without a partner in the province and with the changes in philosophy of the federal government moving them away from training, they eventually felt compelled to withdraw from the program as well.

20. What, in your opinion, can be learned from this initiative that will improve future efforts?

This question generated the following responses:

Develop clear and comprehensive objectives for the program, translate those objectives into workable procedures, and then communicate them to all of the people who will be involved in any aspect of the program before introducing it to the public.

Ensure that the characteristics of simplicity of application and quick, reliable response are incorporated into the procedures.

Continue with a joint funding model in which the expected levels of contribution from each party to the contract are specified at the outset.

Target the program to specific sectors of the economy that may be experiencing challenges for different reasons; for example, small business, industries producing value added products, industries developing export market potential and fisheries related industries.

Ensure that critical aspects of decision making, such as budget allocation and spending authority, are held at the same level within the administrative structures that have responsibility for delivering the program.

Ensure that all of the steps in the procedures are well grounded in the purpose and objectives of the program and that all of the steps are mutually acceptable to both of the parties that are jointly delivering the program.

Prepare a program that addresses the whole of human resource development in a business in a way that employers can come to appreciate the cost and benefits of investing in training and adjustment to work force challenges.

(Paraphrased Opinions) A program that has this kind of capability is needed, but it should be targeted to specific types of situations as opposed to being mass marketed on a wide open basis in the way it was at its outset.

I think that this should be a tool that adjustment professionals can use if the situation warranted, not just as a general training program which is marketed or advertised or promoted out in the community as a training subsidy. It should be used in conjunction with adjustment processes which include general employee consultations at the front end.

EMPLOYER/WORK FORCE REPRESENTATIVES

1. What, in your opinion, was the purpose of the QRTA Program?

The program was there to assist employers with providing training to employees in the face of workplace change that could include response to impending job loss or the demand to upgrade skills to maintain employment.

2. What procedures did an employer need to follow in order to receive funding under the program?

The employer, or in one case the union, prepared a business plan or a proposal indicating the nature of the need and the proposed solution. That was submitted to the QRTA representative who had it reviewed and if accepted, it was used as the basis of establishing the funding that was needed.

The process provided for a great deal of flexibility in defining the nature of the need and in turn identifying the solution that was to be applied. In one situation the workers were very vulnerable and easily threatened by the process. In consultation with their union and employer they were able to provide a large measure of input into the process, thereby experiencing a degree of confidence and control in the face of impending job loss that otherwise would not have been possible.

3. In your opinion, how well did those procedures work?

The process of developing the proposal required the employer to critically assess the nature of the need, which in turn enabled them to develop a more comprehensive approach to the need. The steps in the process worked well with no indication of significant problems.

4. How would describe the consistency of communication between the two levels of government that were jointly administering the program and the potential candidates?

Three of the representatives indicated that the communication was consistent and that each of the federal and provincial consultants were in close communication with each other. In the fourth situation, the employer indicated that they were dealing with two separate and independent levels of government. They met with each consultant separately and the two levels of government applied different policies regarding such issues as payment of funds.

5. Were the aspects of the program such as application, contracting and funding provided within the time that was expected?

All aspects of the program were described as having proceeded quickly and within the time that was expected, except for the one situation in which there were two separate payment policies imposed on the same project.

6. Were the objectives of the contracts for service described in sufficient detail to determine whether or not they had been accomplished?

The objectives were clear and readily evaluated.

7. Were you aware of any performance related problems that occurred in carrying out contracts?

8. How were those problems addressed?

In three of the situations, there were no performance problems that were identified.

In the fourth situation, the employer had not completed all of the training that had been agreed upon and had failed to submit the accountability reports that were a requirement of the contract. The consultant who had negotiated the contract was subsequently replaced by someone new to the file. In the employer's view, the initial discussions to clarify the situation were hampered to a great extent by the consultant's lack of understanding of the employer's circumstances and the information that was contained in the file. After a series of lengthy discussions the problem was identified and resolved to the satisfaction of all parties.

9. In your opinion, was there a continued need for the program?

There is a strong and clearly perceived need on the part of employers' representatives of workers for a program such as QRTA. It is identified as having been very different from other programs of this nature and, as a result of the flexible and adaptive manner in which it was delivered, it was perceived as being very successful.

10. Please describe your perception of that level of need for the program.

The nature of the need in two of the four situations was clearly defined in terms of having to respond to the demands of a rapidly changing environment in which factors such as the application of technology were resulting in the rapid elimination of existing jobs, and an equally rapid development of new employment positions. In these situations, the impact of a wider and more complex marketplace with increased levels of competition is being felt, but it is the pace of changing technology that is having the most direct impact on current jobs.

In the third situation, the need to train and upgrade the skill levels of workers is more of a traditional factor in an industry that has been characterised by the need for large capitalisation. The development of a more complex marketplace with increased levels of competition is increasing the costs of not investing in such training, thereby increasing the pressure on such firms to expand their efforts in this area. It could be said that firms in these types of industrial sectors might be more likely to accept such investment as a cost of doing business and may therefore be in a better position to continue such investment with or without the help of such programs as QRTA.

In the fourth situation, the development of a more complex marketplace with increased levels of competition has resulted in the elimination of jobs due to plant closure in an industry that is characterised by lower levels of capitalisation and low levels of investment in workplace training. A program such as QRTA has a direct application to such situations. The incremental improvement in skills within a workplace that is characterised by chronically low skill levels is more likely to have an immediate and significant impact on the conditions of those workers who, without this opportunity, would face tremendous obstacles in trying to avoid becoming more marginalised in an increasingly complex economy.

11. To what extent did the program provide what you expected of it ?

The consensus of opinion is that the program did provide what was expected of it. That was due in large measure to the fact that the employers, and in some cases the workers, were able to define the problem, identify the solution and consequently determine the criteria by which they could measure their success.

This type of program model requires the participants to contribute a great deal to the intervention. The two levels of government were there primarily to assist with the design and implementation of a service for which the participants had identified the need. The participants consequently maintained a large measure of control and ownership over the program and were able to accept both credit and responsibility for the outcome.

12. Did the services provided under the program meet your needs at the time?

The consensus is that the program fully met the need of the both employers and employees as specified in the proposal and subsequent contract.

13. What, in your opinion, can be learned from this Initiative that will improve future efforts?

The proposal that is prepared by the participants would be enhanced by the development of a contingency plan. Such a plan would be a very useful tool when faced with having to modify the intended intervention in response to unforeseen circumstances.

Increasing the degree of co-ordination between the two levels of government and streamlining the process by using a single set of requirements for application, service delivery and reporting would also improve the program.