

HIGHLIGHTS FROM THE MEMBERSHIP SERVICES REVIEW BY OPTIMUS SBR, 2021

BACKGROUND AND CONTEXT

- The Ontario College of Teachers' Membership Services department engaged Optimus SBR, an independent consultant, to assess its operations, policies and staffing, focusing on the services provided by Client Services (CS), Records and Evaluation units, with the goal of improving service timelines and levels.
- 2021 has been a record-breaking year for client inquiries and applications and was compounded by different factors, including: an evolving work landscape due to the COVID-19 global pandemic, an increasing number of applications, critical and urgent changes in government regulations, and the implementation of a new Customer Relationship Management system.
- The assessment was carried out in 2021 to proactively address and improve service timelines and level.

KEY FINDINGS, OBSERVATIONS AND RECOMMENDATIONS

The report observed the following processes and recommended the College maintain its work by continuing and building on its:

- **Fair and objective processes:** the type of work and services provided are in alignment with government regulations and policies. There is no evidence of bias in the processes.
- **Diligent application and evaluation processes:** the College is commended for many positive aspects of its approach to evaluation of applications, including diligence in conducting evaluations based on comprehensive standards, being sensitive to the needs of the applicants and arranging for an external review.
- **Commitment to positive change:** in many cases, the recommendations support and reinforce the College's long-term commitment to continuous improvement, including the growth and expansion of existing tools and practices.

The report also observed the following areas of improvement and provided **four key recommendations:**

Observation	Recommendation
<p>Insufficient staffing: the current staff complement is physically unable to meet current and rising service levels, resulting in a backlog of inquiries and requests. Additional staff are needed to meet these levels.</p> <p>The College currently has a staff to member ratio of 1:1,290. For comparison:</p> <ul style="list-style-type: none">• 1:893 – The Ontario Association of Certified Engineering Technicians and Technologists.• 1: 891 – The College of Early Childhood Educators.• 1: 893 – The Professional Engineers Ontario	<p>1. Increase staffing: add more staff to the Membership Services department to close the staff to member ratio and sufficiently address client needs.</p>

Observation	Recommendation
<p>Finding more efficiencies: many of the existing client service processes are manual, resulting in a hands-on approach by staff.</p>	<p>2. Adding online self-serve options: implement and increase the number of self-service options for members and applicants, including access to real-time information on their files, which would alleviate the need to contact Client Services directly.</p> <p>3. Leveraging technology: expand technological capabilities that would speed up the College's processes, including automated document verification and data collection as well as an automated customer service management system to provide clients with quick answers to frequently asked questions.</p>
<p>Siloed units: Various factors, including COVID-19 has siloed employees, limiting their focus to their immediate roles. As a result, a knowledge gap of how each unit's work directly impacts each other has grown.</p>	<p>4. Collaboration: improving teamwork and communication between Membership Services units, including regular cross-team check-ins and cross-training staff.</p>

Next steps

The College is committed to improving its service levels and response times. The recommendations made by Optimus SBR will be implemented in three phases:

- Phase 1: **Alleviate** current backlog by taking immediate action on solutions that can be quickly and easily implemented (i.e., explore self-serve options for applicants, automated capabilities for submitting documents).
- Phase 2: **Improve** service levels and **shorten** timelines by implementing solutions that require more lead time (i.e., increase staff and provide additional training).
- Phase 3: **Bolster** our team by addressing other issues identified by Optimus, including those that may not have a direct impact on service levels, but affect staff (i.e., implement initiatives to improve collaboration within department).
- The overall goal is to have the College's Membership Services department emerge as a department that remains committed to outstanding quality but with an ability to carry out its work in a more timely, efficient way.

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