

A Manual for Setting up an
Essential Skills Program
within the Union or Workplace



Acknowledgements

This manual was written by Nancy Steel, Bow Valley College, for the Alberta Union of Provincial Employees with the help of Greg Maruca, Union Representative - Education, and the Essential Skills Advisory Committee members, including:

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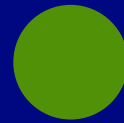
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12 Principles of Good Practice

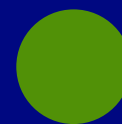


12 Principles of Good Practice in Workplace Essential Skills Programs

Workplace essential skills programs have certain principles of good practice that ensure quality programming.

1. The union is a full partner from the outset in the initiative, including any needs assessment, program design, program evaluation, hiring staff and program delivery.
2. The intent of the essential skills program is not to “fix” workers. The intent of the program is to provide them with the learning they want to meet their life-long goals and potential.
3. Participants’ progress is kept confidential. Information about individuals’ progress in the program is not shared with the employer.
4. Participation is voluntary.
5. The program content is not restricted to workplace content. Participants can enhance essential skills in the context of union, home and community, too.
6. Program instruction acknowledges participants’ prior learning and respects experience by building on existing skills and knowledge.
7. Programs respect the cultural and racial diversity of participants.
8. Programs are accessible to all. No worker is excluded and programs are delivered at times and place that allow everyone access.
9. Participants’ varied learning styles are accommodated.
10. Essential skills programs are accepted as training that is like any other training, not segregated or stigmatized.
11. As part of any essential skills development philosophy, clear language is promoted within the organization and the union so that documents can be easily understood by all.
12. Programs are evaluated by learners and others on an on-going basis to ensure that the learning is meaningful and relevant.

Glossary of Essential Skills terms and acronyms



A

Action Plan – is a strategy that describes what steps will be taken and when they will be taken in order to carry out the objectives of the essential skills initiative.

Assessment vs. Evaluation – terms are not the same. Assessment is done to determine a rate or amount – a person’s learning needs may be assessed or progress may be assessed. Evaluation is to determine significance or worth or judging the effectiveness or worth of educational programs. People are assessed, programs are evaluated.

Authentic documents – are actual union or workplace documents that can be used as materials for improving reading, writing or math skills.

C

Communication Plan – is a strategy that describes what messages you will communicate to whom, when and how. Communication plans are part of any essential skills needs assessment or essential skills program administration to ensure that stakeholders are regularly informed.

Curriculum development – the systematic creation of learning units or modules in a specific subject area

D

Document literacy – the knowledge and skills required to locate and use information in documents like forms and charts

Drop-in Learning Centre – a centre that is staffed by a coordinator/facilitator and which can offer people, on a drop-in basis, essential skills training in a variety of ways, either computer based instruction, peer tutoring or small workshop, according to their preference.

E

ESL – English as a Second Language

Essential skills – In this manual, essential skills refer to reading, writing, math, oral communication and computer skills. The Government of Canada identifies nine essential skills: reading text, document use, numeracy, writing, oral communication, working with others, thinking skills, computer use and continuous learning.

Essential Skills Needs Assessment (ESNA) – a process used to determine essential skills learning needs among a group of people in a workplace or union.

Essential Skill Profile – a description of the way a person in a specific occupation uses reading, writing, math, oral communication and computers on the job.

F

Formative Evaluation Plan – is a strategy developed at the outset of the essential skills needs assessment or essential skills program to ensure that the initiative is meeting its goals and objective.



Glossary of Essential Skills terms and acronyms

I

Integrated essential skills training – is reading, writing, math oral communication or computer skills development that is woven into technical, union, or safety training and which enhances that training.

International Adult Literacy Survey (IALS) – an international survey of 21 countries' citizens to determine literacy levels of adults in those countries

L

Literacy definition - Being literate is the ability to use print information, numbers, computers and speech to accomplish one's goals and realize opportunities and potential.

N

National Literacy Secretariat (NLS) – a branch of Human Resource and Skill Development Canada that provides funding for essential skills initiatives.

National Occupation Classification System (NOC) – provides information about 30,000 occupational titles, describing general job tasks, education and experience requirements and opportunities for advancement.

P

Peer tutoring – an instructional approach whereby a trained tutor works with a co-worker to help that person improve essential skills

Prose literacy – the knowledge and skills required to read, understand and use information in text, like emails, collective agreements and reports

Q

Quantitative literacy – the knowledge and skills required to perform math functions, like balancing a cheque book or figuring out interest on a loan

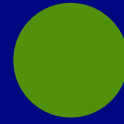
S

Stakeholders – the group of people who have a vested interest in the essential skills activity. In workplace essential skills initiatives the stakeholders are usually the employees/union members, the Union and the Employer.

W

Worker-centred programs – are programs that revolve around the individual worker's goals, not employer goals. The program content is not restricted to workplace content. Participants can also enhance essential skills in the context of home and community.

AUPE history of essential skills activities



Essential Skills Needs Assessment

In June 2002, AUPE made application to the National Literacy Secretariat for funding to conduct an Essential Skills Needs Assessment. The goal of the needs assessment was to find out if AUPE members had a need to improve reading, writing, math, oral communication or computer skills.

Change affects how we use these skills. Ask anyone today if 5 – 10 years ago they were using computers as they are today and the answer will be “no”. AUPE members have had to acquire computer skills. It is also true that today there is more reading required at work and at home, more writing and documentation required, and more communication by telephone and in person with a wide variety of people.

During the needs assessment we asked people about changes they have been experiencing and how this might have affected their use of essential skills. They said:

“Workers need to be in a constant learning mode to keep up.”

“We have less time to learn and to read new procedures.”

“My use of skills is not very good and I need to take some classes to keep up, especially computer classes.”

“There are continual changes in software used for tracking and documenting work.”

“My skills are fully utilized but still require training on an on-going basis.”

“I am expected to keep up with the increase [in workload] without the proper training or staff.”

“I don’t mind using more skills and gaining more but time should be allotted for this and courses provided.”

In fact, 81% of the members who took part in the needs assessment said that they have more reading to do on the job today and 80% said they have more writing to do. However, when asked which of these essential skills they would most like to improve, the majority indicated that they would most like to improve their oral communication skills. They commented:

“Basically I’m a coward in a crowd.”

“I have a number, which is 30-35, under that and I am fine, more people than that and I am unbelievably bad.”

“I am hoping to go to the Labour Education school in March and take the course on communication because I know I am weak in that area.”

“Public speaking is difficult, however I can do it if put to the task.”

“A class or two on this would be GREAT!”

“I find that I am not taken very seriously by management when I have an issue or problem and do not like to be talked at in a condescending manner.”



AUPE history of essential skills activities

“In my department communication is vital to our success, however our team leader is very tight when it comes to sharing ideas and knowledge. We are asked to provide suggestions but then they are shot down without any thought. When there are changes our input is not considered to be of any value.”

“Communication takes practice.”

After reviewing the findings of the needs assessment, the steering committee created six recommendations:

1. It is recommended that a workshop for AUPE union officers be offered to further their knowledge and understanding of essential skills as an issue for their members.
2. It is recommended that a needs assessment take place in a healthcare facility to determine members' learning needs at that particular worksite so that a training program can be offered in response to those specified needs.
3. It is recommended that a video be created to further raise the awareness of AUPE members, union officers, and employers about essential skills as an issue.
4. It is recommended that a “How-to” manual be created to provide information and direction to those locals that wish to mount essential skills programs for their members.
5. It is recommended that AUPE promote essential skills at a major AUPE event, such as Convention or Labour Education School.
6. It is recommended that a one day event be created to allow AUPE union leaders to meet with public education providers for an exchange of information about members' essential skill learning needs and services that are available from educators in response to those needs.

A copy of the full report or the summary report can be obtained from the AUPE Education representative.

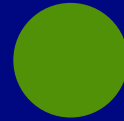
Resolution at the 2002 Convention

With the needs assessment well underway by October 2002, the Membership Services Committee put forward a resolution that was accepted by the convention delegates:

WHEREAS we often portray Literacy and English as a Second Language as simply acquiring basic English reading, writing, mathematical and speaking skills; and

WHEREAS Literacy and ESL should be far more in order to provide training which is empowering and be delivered in ways that are independent of getting and keeping employment; and

AUPE history of essential skills activities



WHEREAS this training can help remove barriers that prevent our members from fully participating in their Union, workplace, community, political system and personal life;

THEREFORE BE IT RESOLVED that the AUPE develop a plan to help our members implement a cooperative education program with employers, labour, public and community institutions to help our members participate in day to day life; and

BE IT FURTHER RESOLVED that AUPE develop a plan to help our Locals/Chapters/Councils to deliver Union sponsored Literacy and ESL training to our members.

This manual represents partial fulfillment of the last resolution.

Presentation at 2003 Convention

The Bow Valley College Consultant who conducted the needs assessment made a 15 minute presentation at the 2003 convention to report the needs assessment findings to delegates.

Essential Skills Workshop for Union leaders

The first recommendation of the needs assessment findings suggested that a workshop be held to increase union leaders' awareness and understanding of essential skills issues and training.

This workshop was held in November 2003 in Canmore and was attended by 25 AUPE union leaders, including President Dan MacLellan and Vice President Kathie Milne.

The workshop kicked off with an evening supper followed by an intriguing presentation by guest speaker Scott Murray, Director General, Social and Institutional Statistics, Statistics Canada. The title of Mr. Murray's talk was Literacy, Numeracy and Opportunity in the Knowledge Economy: What We Know. Mr. Murray's presentation surprised many of the delegates who were made aware of the links between essential skills levels and employment opportunities and employment security.

The following day's workshop was facilitated by the Bow Valley College consultant and the Education Representative and explored such topics as Myths about Literacy and Essential Skills, How AUPE Members Use Essential Skills on the Job and Essential Skills: A Union Issue.



AUPE history of essential skills

At the end of the workshop participants were asked two questions and provided these responses:

Q: What did you learn in this workshop that was interesting?

A: “That a lot of people don’t get involved [in the union] because they lack the knowledge to give them confidence”

“The need to promote literacy and the role of the union in promoting it”

“The statistics and trends on a country-by-country basis; how other countries compare to Canada”

“That union involvement increases after literacy education”

“An increased awareness of the definition of literacy”

Q: What did you learn that you will find useful?

A: “How other unions are implementing these programs”

“How essential skills levels affect the economy, social position and how our country compares to others. Especially liked the Scott Murray presentation.”

“Essential skills are a continuing education issue in every sector and every occupation.”

“To keep my eyes and ears wide open to recognize literacy needs of my worksite.”

“There are people within our union who are ready and willing to put some courses together for our workers.”

A complete report of the workshop can be obtained from the Education Representative.

☐ Presentation at meeting of multi-aux executive healthcare providers and at a meeting of Local 71 members (February 2004)

These one-hour presentations were condensed versions of the November 2003 workshop, and were in fact prompted by two delegates from that workshop who felt that their members would benefit from learning more about the issue and about possible essential skills training opportunities.

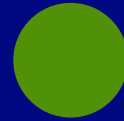
☐ Union – Management meeting, Olds College (July 2004)

This meeting was arranged by the union representative (Local 71) at Olds College. This member was present at the February meeting of Local 71 representatives. He wished to explore the possibility of undertaking an essential skills needs assessment and training for faculty and support workers at the college.

☐ Proposal submitted to the National Literacy Secretariat

In September 2003, AUPE submitted a proposal to the National Literacy Secretariat for funding to fulfill the remaining five of the six recommendations that were created based on the needs assessment findings. Approval of that proposal was received on September 8, 2004. This manual is part of that project proposal.

The International Adult Literacy Survey says ...



What is the International Adult Literacy Survey?

The International National Adult Literacy Survey was first conducted in 1994 and tested and compared the literacy skill levels of citizens across seven countries. In the following years, the tests and comparisons increased to include a total of 21 countries around the world.

Why was the survey conducted?

The survey was conducted to provide evidence that literacy skill levels had a relationship to social and economic well being and potential, both of individuals and of countries.

Who conducted the survey?

The survey was a joint initiative of the Organization for Economic Cooperation and Development and Statistics Canada.

Which countries participated?

Belgium	Czech Republic	Denmark
Finland	Germany	Great Britain
Hungary	Ireland	Italy
Netherlands	Northern Ireland	Norway
Poland	Portugal	Slovenia
Sweden	Switzerland	Canada
Australia	New Zealand	Chile

Which literacy skills were tested and compared?

Prose Literacy – the knowledge and skills required to use information in various formats such as newspaper articles and fiction.

Document Literacy – the knowledge and skills required to locate and use information contained in various formats, including job applications, payroll forms and transportation schedules.

Quantitative Literacy – the knowledge and skills required to apply arithmetic operations to numbers embedded in printed materials, such as balancing a cheque book, figuring out a tip or interest on a loan.

How were the test levels organized?

The testing levels ranged from Level 1 through to level 4/5, level 4/5 being the highest performance level.



What did the survey findings say?

- Important differences in literacy skill exist both within and among countries and support the basic theory of IALS that skill differences exist that are large enough to matter both socially and economically.
- Literacy is strongly associated with economic opportunities and well-being. It affects employment stability, the incidence of unemployment and income.
- In North America and several European countries scores on the quantitative scale show the strongest link to income. There is a large ‘wage premium’ in Canada, Ireland, the United Kingdom and the United States for those whose literacy proficiency is at the highest level (level 4/5).
- Literacy levels are clearly linked to occupations and industries; some occupations call for high-level skills, others intermediate skills.
- The relationship between literacy proficiency and educational attainment is complex. Although the association is strong, there are some surprising exceptions. For example, many adults have managed to attain a relatively high level of literacy proficiency despite a low level of education but there are some who have low literacy skills despite a high level of education. This finding proves another of IALS theory that educational attainment level is not always an accurate measure of a person’s literacy skill level.
- Low skills are found not just among marginalized groups but among significant proportions of adult populations in the countries surveyed. **The data show that adult education and training programs are less likely to reach those with low skills, who need them most.** There is still a tendency to “train the best, and forget the rest.”
- Adults with low literacy skills do not usually consider that their lack of skills presents them with any difficulties. When asked if their reading skills were sufficient to meet everyday needs, respondents replied overwhelmingly that they were, regardless of tested skill levels. This may reflect the fact that many respondents are in jobs that do not require them to use literacy ... but jobs today increasingly demand literacy skill use.
- Literacy skills, like muscles, are maintained and strengthened through regular use. While schooling provides an essential foundation, **the evidence suggests that only through using literacy skills in daily activities – both at home and at work – will higher levels of performance be attained.**
- Literacy plays an important role in the determination of wages.

The International Adult Literacy Survey says ...



- Policy-makers must encourage employers to demand and reward high skills **while ensuring that adequate learning opportunities are available to those economically or socially at risk because of their low skills.**

Is there statistical information specific to Canada?

- Yes, in 1996 a document entitled Reading the Future: A Portrait of Literacy in Canada was produced. Some interesting facts:
- In Canada, 48% of the population struggles at levels 1-2 with reading, document use and numeracy.
- Literacy levels are lower in eastern provinces and higher in western provinces.
- Of all the countries surveyed in 1994, Canada is unique in having the largest number of immigrants at levels 4/5. This is probably a result of our immigration policy that favours the immigration of skilled workers.
- About 40% of Canadians over age 65 have not completed primary school, and 54% of those over 65 were at literacy level 1.
- Different occupations showed different strength and weakness in terms of literacy skills. For example, 45% of technicians are at levels 4/5 on the quantitative scale but only 26% are levels 4/5 on the document use scale. More clerical workers are at the 4/5 level for document use (28%), than on the prose (15%) and quantitative scale (19%).
- Jobs requiring higher skills in the 4 - 5 range are on the increase; jobs requiring levels 1 - 2 are on the decline.
- A Canadian who is unemployed is three times as likely to be at Level 1 than an employed Canadian. And employed Canadians are three times as likely to be at Levels 4/5.
- About 60% of Canadians at Level 1 make less than \$18,000/year.

About 60% of Canadians at Level 1 said “Not at all” when asked if they felt their low literacy skills limited them in terms of opportunities. We know from the findings that that is simply not true, but the worry is that if people don’t recognize a skill deficit they will be less likely to take measures to increase or develop their skills.



The International Adult Literacy Survey says ...

What does this information mean to AUPE members?

The International Adult Literacy Survey is a wake-up call.

The IALS finding that if you don't use skills, you may lose skills is also applicable to AUPE members, many of who have been out of school for many years and who may not have had to use some of these skills for a number of years. They may find themselves taking on new job responsibilities that require them to use these skills again, or use them in new ways and so may have to refresh their learning of a particular skill.

Further, according to IALS, 48% of Canadians struggle with essential skills at the 1 – 2 level and so it is possible that a proportion of AUPE members may struggle with those skills. This is one reason why AUPE should take on essential skills as a Labour issue. By being aware of the issue and by advocating for this to be a part of the workplace training agenda, AUPE can help members who struggle with essential skills.

Is the Survey now complete?

The original survey is complete and the final publication “Literacy in the Information Age: The final report of the International Adult literacy Survey” has been produced.

However, a new survey is being undertaken to produce estimates of change in the literacy proficiency of the adult population, 16 and over, in Canada since the 1994 IALS study.

It will also examine problem-solving, teamwork and information and communication technology literacy, all skills that Canadians need for success.

Essential Skills Profiles of AUPE Members



Essential Skills Profiles are descriptions of the ways in which a person in a certain job uses essential skills and identifies which essential skills are the most critical in that job. For example, the three key essential skills used by most Hospital Assistants are Oral Communication, Job Task Planning and Organizing and Working with Others. For most Accounting Clerks, the three key essential skills used are Numeracy, Oral Communication and Problem Solving.

To read about the essential skills as used by an occupation, go to the Internet link

http://www15.hrdc-drhc.gc.ca/english/general/all_profiles.asp

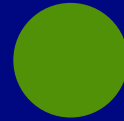
Click on the “View Profile” box beside the occupation you wish to view. The chart below lists the profiles that have been created and which represent some of the occupations of AUPE members.

1. Accounting and Related Clerks
2. Administrative Clerks
3. Attendants in Recreation, Sport, Accommodation and Travel (Except Airline Travel)
4. Banking, Insurance and Other Financial Clerks
5. Binding and Finishing Machine Operators
6. Boilermaker
7. Bricklayer
8. Bus Drivers, Subway Operators and Other Transit Operators
9. By-Law Enforcement and Other Regulatory Officers
10. Cabinet Maker
11. Camera, Platemaking and Other Pre-press Occupations
12. Campground Operators
13. Carpenter
14. Cashiers
15. Cleaners
16. Computer Operators
17. Cook
18. Correctional Service Officers
19. Correspondence, Publication and Related Clerks
20. Couriers and Messengers



Essential Skills Profiles of AUPE Members

21. Court Clerks
22. Customer Service, Information and Related Clerks
23. Data Entry Clerks
24. Delivery Drivers
25. Dental Assistants
26. Dental Laboratory Bench Workers
27. Dispatchers and Radio Operators
28. Dry Cleaning and Laundry Occupations and Ironing, Pressing and Finishing Occupations
29. Early Childhood Educator Assistants
30. Food and Beverage Servers
31. General Office Clerks
32. Heavy Equipment Operators (Except Crane)
33. Heritage Interpreters
34. Human Resources Professionals
35. Industrial Electrician
36. Industrial Engineering Technicians
37. Industrial Instrument Mechanic
38. Inspectors and Testers, Mineral and Metal Processing
39. Inspectors and Testers: Fabric, Fur and Leather Manufacturing
40. Insulator (Heat and Frost)
41. Kitchen Helpers and Line Cooks
42. Labourers in Processing, Manufacturing and Utilities
43. Library Clerks
44. Local Tour Guides
45. Machining Tool Operators
46. Mail, Related Clerks
47. Material Handlers
48. Mechanical Inspectors
49. Motor Vehicle Assemblers, Inspectors and Testers
50. Nurse Aides and Orderlies



51. Nursery and Greenhouse Workers
52. Other Aides and Assistants in Support of Health Services (NOC 3414)
53. Painter and Decorator (NOC 7294)
54. Payroll Clerks (NOC 1432)
55. Personnel Clerks (NOC 1442)
56. Printing Machine Operators (NOC 9471)
57. Process Control and Machine Operators, Food and Beverage Processing (NOC 9461)
58. Public Works Maintenance Equipment Operators (NOC 7422)
59. Public Works and Maintenance Labourers and Railway and Motor Transport Labourers (NOC 7621, 7622)
60. Purchasing and Inventory Clerks (NOC 1474)
61. Quality Control Technicians (NOC 2233)
62. Receptionists and Switchboard Operators (NOC 1414)
63. Records and File Clerks (NOC 1413)
64. Retail First Level Managers (NOC 6211)
65. Security Guards (NOC 6651)
66. Sheriffs and Bailiffs (NOC 6461)
67. Shippers and Receivers (NOC 1471)
68. Signmakers (NOC 9498, 9484)
69. Small Business Counsellor (NOC 4163)
70. Storekeepers and Parts Clerks (NOC 1472)
71. Telephone Operators (NOC 1424)
72. Tellers, Financial Services (NOC 1433)
73. Testers and Graders, Food and Beverage Processing (NOC 9465)
74. Trades Helpers and Labourers (NOC 761)
75. Truck Drivers (NOC 7411)
76. Truck and Transport Mechanic (NOC 7321)
77. Typesetters and Related Occupations (NOC 1423)
78. Typists and Word Processing Operators (NOC 1412)
79. Visiting Homemakers, Housekeepers and Related Occupations (NOC 6471)



A Day in the Essential Skills Life

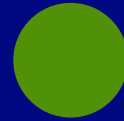
A Day in the Essential Skills Life of Four AUPE Members

This section contains a daily profile of how four AUPE members use essential skills during the course of a workday.

These are the words you will see associated with Essential Skills that you will find in the narratives:

<p>READING SKILLS</p> <p>skim scan read proof read match words examine locate inspect interpret identify</p>	<p>WRITING SKILLS</p> <p>compose create write</p>	<p>MATH SKILLS</p> <p>schedule prioritize estimate calculate add subtract cost analysis convert count</p>
<p>COMMUNICATION SKILLS</p> <p>communicate speak listen consult instruct/teach discuss inform report collaborate negotiate interact conference chat describe suggest introduce testify</p>	<p>COMPUTER SKILLS</p> <p>boot open email print enter database send post information delete</p>	<p>THINKING SKILLS THAT UNDERLIE ESSENTIAL SKILL</p> <p>decide file (categorize) conclude evaluate problem solve remember resolve assess follow instructions compare co-ordinate</p>

A Day in the Essential Skills Life



A Day in the Essential Skills Life of an AUPE Member, Boards, Agencies and Municipalities Sector Ian Munro, Inspector, Tobacco Enforcement (South) Alberta Gaming and Liquor Commission



Ian Munro has been a Tobacco Inspector for 2.5 years, having been employed previously as a Caseworker with the Provincial Correctional System. When asked what one word would describe his job, he replied “enjoyable” because of the latitude he has to make decisions and decide options. This latitude is a contrast to the structured nature of his previous job so he finds this new way of working both challenging and a pleasure. He noted that another word to describe his job is “detailed”, because details are important given the legal nature of his job. His chief task as a Tobacco Inspector is to visit tobacco retailers to ensure they are in compliance with the

Tobacco Tax Act.

Ian begins his workday at 8:15 by **booting** up his computer, opening his email inbox, and **scanning** the list of emails. He **skims** each email and **decides** whether to forward it to someone else’s attention, to delete it if it is not relevant particularly, or to **print** it for filing for future reference.

He then turns to the Tobacco Retail Compliance Report, the primary document that he uses at each visit to a retailer to record details of their tobacco inventory and sales. Referring to this document, Ian **writes** notes in his log book that are a more detailed and complete explanation of the information on the form report. This logbook is extremely important because if he is required to go to court to **testify**, the notes will be the basis of his testimony. He updates this logbook every day.

Ian then joins his co-workers for morning coffee and they **discuss** various office and work issues, **describing** problems and **suggesting** solutions. After coffee, Ian and his partner, head out to visit retailers.

Teamwork is important when visiting the retailers. Usually, Ian **introduces** himself and **explains** why they are there. They show identification because the questions that they will ask are of a confidential business nature. Usually, Ian’s partner **asks** the questions, and while he does so Ian inspects the retailer’s business license and conducts a visual inspection of the tobacco products on display, behind the counter and in the garbage containers to ensure they are in compliance with the Act and that there are no out of province products being sold. Effective oral communication skills are very important during these visits because the inspectors must **ask** specific questions with legal implications and **listen** to the answers carefully, as they too carry legal implications.

After a lunchbreak back at the office, they **decide** which retailers to visit in the afternoon. While there is not established schedule’s as such, they generally divide the city into quadrants and conduct inspections quadrant by quadrant.



A Day in the Essential Skills Life

Throughout the day, Ian uses math to **calculate** tax rates and tax amounts applied, **calculates** weights of tobacco and frequently **converts** imperial weights to metric weights.

His use of computers is not confined to email; he regularly searches E-Bay to see if tobacco products are being sold illegally there, and **creates** files using the Investigation System, a software database.

Ian also uses essential skills for his union work. In the past, he has been a Shop Steward and in that role he was required to **resolve** conflicts, **solve** problems, **read** and **interpret** collective agreements, and **share information** at meetings and on the shop floor with members.

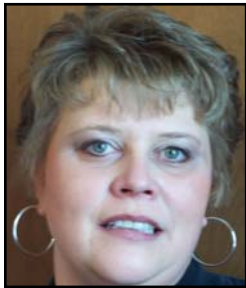
Does Ian use essential skills every day, all day? Yes!

A Day in the Essential Skills Life



A Day in the Essential Skills Life of an AUPE Member, Healthcare Sector

Tammy Graham, Licensed Practical Nurse
Olds General Hospital and Care Centre



Tammy has worked in the healthcare field for 16 years, has worked in three different units of the hospital and now works in the Acute Care Unit. She identifies herself as a “Jackie of All Trades” because of the variety of functions she performs as an LPN and because of the diverse client groups served by the Acute Care Unit. For this reason too, the one word she uses to describe her job is “multi-tasking.”

Tammy works two shifts: 12 hour days beginning at 7 a.m. and 12 hour nights, beginning at 7 p.m. on a four week rotation. We chose to talk about her day shift, as that is the shift that requires her to interact with more people.

While she arrives at work for 7 a.m., the real work begins at 7:15, when she and her crew gather together to, in **teamwork** fashion, **listen** to a taped report created by the nightshift crew. While listening, Tammy **writes** notes. She **records** the patient name and room, doctor and diagnosis and any pertinent notes that will inform her care of the patient, for example, if the patient has been fasting for a test that day.

She is then paired with a Registered Nurse. In a **collaborative** fashion, they **decide** which patients Tammy will be responsible for that day. Tammy is usually responsible for five to seven patients.

They then **read** the Care Plan book reviewing the care plans for those particular patients, for example, if any patients will be having blood tests or if any require dressing changes.

By 8:15, she is working on the floor, helping to distribute breakfast trays, dispensing pills, and feeding patients who require that help. All the while, she **chats** with patients and **interacts** with co-workers. As she chats with patients she is also conducting quick physical **assessments** to ensure their condition is matching that written in the Care Plan book, noting any changes. This portion of her shift takes about one half hour to 45 minutes depending on the number of patients she is responsible for, the acuity of care required, or the need to deal with unexpected incidents. Dealing with unexpected incidents, such as respiratory arrest, requires on-the-spot problem solving, and the **problem solving** will often depend on the resources available to her.

On her morning coffee break, she talks mainly about work with her co-workers. They **seek and give advice** to each other. Tammy, being an active union member, also **informs** co-workers of union activities and events. She is a shop Steward for Local 44, Chapter 02, a Chapter Chairperson, a member of the Membership Services



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Committee and Essential Skills Advisory Committee, and a Provincial Executive Representative.

Once back on the floor, she dispenses the 10 a.m. medications. She may also, in this period, experience frequent interruptions, for example phone calls from family members of patients for whom she is responsible. She must follow a certain protocol when **speaking** with family members or friends of the patient according to the Freedom of Information and Privacy Act. Primarily she must decide how much information she provides, depending largely on the relationship of the caller to the patient.

Prioritizing her tasks, depending on the care treatment required and the condition of the patient is very important so that she is able to **manage her time** well during morning care. Her morning care involves conducting vital sign **measurement**. She **measures** the patient's temperature, blood rate oxygen level, and listens to their chest. Based on these assessments, she may decide, for example, to increase the patient's oxygen level. Some other medication treatments require that that use math to ensure proper dosage. All the while, she charts the information. At one time, charting was done at end of the shift, but now it is done on-the-go, which makes the task easier because less memory is required to do it accurately.

After her 11:30 – 12:00 lunch period, she returns to the floor and once again helps to distribute lunch trays, assists with feeding as required and provides treatments according to notes from the taped report and the Care Plan book. She may also **record** how much a patient has eaten.

During the early afternoon when many of the patients are napping, Tammy may then **teach** patients procedures. For example, she might tell and demonstrate to new parents how to bathe their newborn. She may attend to post-operative patients, helping them to walk, all the while **assessing** their condition to determine if, for example, they are experiencing nausea.

During the afternoon lull she also participates in **team conferencing**. They **describe** to each other the care they have provided for their assigned patients that day and consult each other for solutions to any problems. During this period, if there is time, she may also do some **reading**: review case studies, the David Thompson Healthcare Authority newsletter, nursing magazines and job postings. She may also **discuss** any rotational shift issues with her manager.

At 2 p.m. she conducts vital measurements again, and at this time too may notice that new patients are being admitted. New patients are frequently admitted at this time of day because morning appointments at clinics have determined that the patient requires hospital admission. She may **complete** transfer sheets if any patient requires testing outside this hospital.

At 5:00 p.m. she will do any pre-meal treatments, dispense pills, help distribute supper trays, and help feed patients. Because throughout the day she is dispensing medication, she also performs narcotic **counts**.

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Although Tammy uses reading, writing, oral communication and math all throughout the day, her use of computers is relatively minimal on day shift because Unit Clerks perform those tasks. On evening shift, however, she uses the computer to **complete admitting forms**, to **send information** back to the admitting desk, to **read on-line** job postings, to check and perhaps **post information** to the regional database.

At 6:00 p.m., Tammy begins **counting** and **recording** her shift totals for vitals counts, I.V. counts, oral intakes and urinary outputs – the intake should be relatively equal to the output.

She then tape records a report for the night shift, being accurate and complete but concise, **deciding** what information is most pertinent.

Does Tammy use essential skills every day, all day? Yes!



A Day in the Essential Skills Life

A Day in the Essential Skills Life
of an AUPE Member, Government Sector
Cec Cardinal, Correctional Officer III,
Calgary Correctional Centre



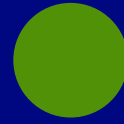
Cec Cardinal has been a Correctional Officer for 25 years. As a Correctional Officer III he is responsible for the custody, care and control of offenders in the centre and while they are escorted out of the centre. As well, he provides direction and supervision of subordinate staff. Cec works 8 hour rotating shifts (days, afternoons and nights) on a 6 on-3 off, schedule. He can be assigned to one of three areas. We have chosen to describe his use of essential skills when he is on day shift, working in the main control room. He describes his job, in one word, as “diverse”. This term describes not only the variety of his responsibilities but embraces the multi-dimensional and spontaneous nature of this high-security, challenging and potentially volatile work environment.

Cec begins his day just prior to 6:45am. He reports to the manager’s office to **review** the muster board. This list indicates daily assigned locations for staff in the facility. Thereafter, the manager and Cec **confer** about these assignments. This is because, although the manager has created the muster, Cec is more familiar with the floor and so may **suggest** changes. He and the manager also **discuss** any new procedures that will be implemented. For example, if there are changes in the attendance protocol, it is ultimately Cec’s responsibility to **inform** the staff of the changes.

Cec then reports to the main control room, where he is accountable for ensuring that all keys, radios and security equipment are present. He **skims** the logbook to see if any incidents were recorded from the previous shift; and, then he **skims** the Offender Release and Transfer sheet and Internal Movement Order sheet to familiarize himself with the planned movements of specific offenders that day. For example, offenders may be transferred within the centre from unit to unit, (in order to meet centre requirements for job placements) or for security reasons. External movement of offenders to court, to outside appointments, to other centers and even for release from custody, are also overseen and accounted for by Cec. He must also **review** the health-care lists to **identify** which offenders are scheduled for dental, medical or psychiatric appointments in the centre. In short, Cec must know where each offender is at all times and must ensure that all offender movements are **coordinated** to ensure a secure and safe working environment.

At the staff muster, the manager reports at least the last 16-hours of on site activity, while Cec conducts a visual inspection of the staff and takes attendance, noting their dress and deportment. The staff members then go to their assigned areas and **count** the offenders.

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These numbers are reported to Cec, who then **compares** this information with the numbers on the Master Count sheet. When the master formal count has been confirmed equal to the physical count, then the On-Shift Manager relieves the previous shift of duty.

Thereafter, Cec works with the other two Correctional Officers III to **coordinate** all offender movements throughout and external to the centre. As well, Cec must facilitate the completion of operational duties all over the centre including, but not limited to, such things as unit searches, drug testing, and facilitation of DNA collection. He also assists with **scheduling** staff breaks bearing in mind the security requirements of the facility are integral to maintaining safety in this potentially volatile environment. He often must adjust his own schedule and that of staff at a moment's notice in order to accommodate and **prioritize** the needs of the centre, or in order to deal with any urgent or emergent situation. Cec must be flexible, self-directed and use his abilities to organize and prioritize a multitude of complex parameters all of the time.

Cec must always demonstrate effective human relations skills. He **motivates** the staff and is concerned and proactive when any staff member appears preoccupied or withdrawn. He instills confidence in the staff and is respected as a role model, especially in crisis situations, by remaining calm, undertaking a leadership role, and **issuing clear directives**. He **promotes teamwork** by involving staff in the problem-solving and decision-making processes.

While at one time correctional officers were strictly authority figures who were solely concerned with discipline, they are now expected to be role models for offenders. They are expected to use behavioral management strategies such as **situational assessment, de-escalation techniques, and conflict resolution skills**. However, these techniques are not formally taught to staff but are rather learned on the job, exemplified by senior staff, like Cec. Therefore, it has become all of the senior staff's responsibility to informally teach and coach staff in these very important strategies (as well as to tutor staff in every other work related capacity).

Cec also has to **complete** specific paper and online documentation on a daily basis. These documents must be completed expediently and accurately since it may be sequestered at any time for legal action. All staff reports (i.e., staff reporting forms or disciplinary hearing charges) must be reviewed by a Correctional Officer III prior to being submitted to the shift manager for final approval/action. Accurate documentation skills are absolutely necessary for every staff member to have, due to the increased complexity and volume of documentation required to maintain the professional integrity of the centre. Of note, Cec and other correctional officers have expressed a need for a writing skills course to increase confidence in this capacity and to make these tasks easier.

On this same theme, Cec has also expressed the need for Correctional Officers to have word processing skills taught on site. Until two years ago, there were no computers available for Correctional Officer III's use, and so only recently has Cec been required to do word processing.



A Day in the Essential Skills Life

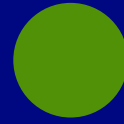
Again, no formal computer skills training are available for the staff at Calgary Correctional Centre. All of his acquired knowledge has been via on the job training, (self taught) or via outside resources. There is a need for employer-sponsored training.

Cec and all other correctional staff are required to **read, recall and utilize** the numerous policies and procedures that are collected in five thick binders. Policies and Procedures outlined therein provide structure and formalization to help guide staff in smooth operations at the centre. It is imperative that Cec be familiar with and able to facilitate the day-to-day operations of the centre within the parameters outlined in the Policies and Procedures Manuals.

As well as executing his role as a Correctional Officer III, Cec also **utilizes** his excellent oral and written communication skills in his role as an active shop steward. He is an advocate for staff, a leader, a role model, a teacher and ultimately an excellent supervisor in a complex and challenging environment. He has been recently assigned to the Human Rights Committee. This is a testament to his commitment to his career and his staff at Calgary Correctional Centre. Without the foundational knowledge and utilization of all of the above outlined essential skills, Cec could not perform his duties in the exemplary fashion for which he is recognized.

Does Cec use essential skills every day, all day? Yes!

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A Day in the Essential Skills Life of an AUPE Member, Education Sector

Janet Bertin, Print Operator (Administrative Support 4)

Bow Valley College, Calgary, Alberta



Janet has been in the printing industry for 22 years, and with Bow Valley College for 8.5 years. She works two different shifts, rotating every two weeks, so may work from 7:30 a.m. – 3:45 p.m. or from 8:45 a.m. – 5:00 p.m. Every Friday, she works the same shift, 8:00 a.m. – 4:15 p.m. When asked what word would best describe her job, she replied, “Multi-tasking”.

Janet begins her day by collecting the completed job requisition forms from the job box. She reads them, **skims** them over, to see what each job entails. She studies them for quantity to determine which machine each job requires so that she can **schedule** her use of equipment. She studies them to determine if copyright approval is required and if so that the paperwork reflects that. She then date-stamps the forms and sorts them according to colour of paper required. She may also **prioritize** according to whether a job is a “rush” job or not.

She then turns the equipment on, the equipment being three printer/copiers, one docutech machine that works at a high speed, produces high volume and is capable of thermal binding, one colour printer/copier and one small black and white printer/copier.

She looks to see if any work is left from yesterday and **reads** any notes from people on the previous shift. If she has a temporary employee working that day, she **instructs** that person and with co-workers **discusses** the status of current jobs.

Once the jobs are underway, Janet **boots** her computer, opens the software program Outlook, and scans the email list to **decide** which emails need to be read first, depending on subject line and sender. Some emails consist of jobs that have been sent electronically, and these she **prints** and **files** until she receives the necessary requisition paperwork. Some emails ask for quotes and so she scans the pricing schedule to match the job type with the cost, or **consults** colleagues in the industry to come up with a price. Some emails request business cards and so she **proofreads** the card request for spelling and punctuation. If it is incorrect, she will have to **compose** an email or fax the changes back to the person. If it is fine, she authorizes the job. At the end of each month, she sends the business card requests to an outside printer.

Communicating with outside printers and paper vendors is a critical aspect of the job and requires effective **speaking** and **listening** skills, as well as having a sound knowledge of paper varieties and qualities. Janet is responsible for ordering all stock, and so she must estimate how much paper stock to order, depending on seasonal demand for paper products at the college. Based on that estimation of need, she **calculates** the



A Day in the Essential Skills Life

number of skids to order, a skid being 40 cases of 20 lb paper, or 200,000 sheets. As part of her decision-making, she will also take into consideration that there is a price break for larger orders.

Communicating with printers and paper providers becomes especially important when a paper order is unusual in its size or quality. To order properly and communicate effectively, Janet must know that paper comes off the mill role at a certain sheet size and the way the grain runs. She must then **calculate**, given the size of paper required for the job, **conclude** how many single sheets she can expect to get from a sheet of paper, and **inform** the paper provider of her order. There are no standard price lists for special orders, and so she must calculate the cost of the paper to include in the customer invoice.

Other special jobs might entail folding or binding by hand, in which case Janet will **estimate** the amount of time that will take, calculate a fee based on \$20.00 per hour, **add** that to the total cost of the materials and tell the customer the total estimated cost of the job.

Janet **creates** and amends pricing schedules based by periodically undertaking a cost **analysis** that examines costs related to materials, equipment use, equipment lease, electricity use, and wages. She also **comparative** shops to ensure that her pricing is in line with industry norms.

It is also Janet's responsibility to **problem-solve** on occasions when the equipment fails. Being an experienced operator, Janet generally **remembers** what the error code means and knows the procedure for **resolving** the problem. If the code is relatively unfamiliar, she will **locate** the instructions for resolving the problem in the equipment manual. If she **assesses** that the problem is more complex, she will telephone a service technician. The person will describe options to her and she must **listen** and **follow the verbal instructions** and **report** back to the technician. If the problem cannot be resolved orally over the telephone, the technician will visit the college and repair the equipment.

On a daily basis, Janet **enters** all of the print requisition information into a computer **database** and at the end of the month **sends** the information to the college's financial management system.

On any given day, Janet might **read** and **evaluate** proposals from equipment and paper companies. She may also **examine** product and service brochures and flyers and **read** trade magazines to keep abreast of industry changes and advancements.

On any given day, Janet will **report** any product, equipment, job or customer problems and their **resolutions** to the Manager of Ancillary Services. She **collaborates** with Shipping and Receiving personnel to agree upon how out bound materials should be shipped and a schedule for doing so. When there is a staff shortage in Ancillary Services, she will **negotiate** the distribution of duties with co-workers in that department. She may **communicate** with the Bookstore Manager to find out what print materials are needed in the store.

Does Janet use essential skills every day, all day? Yes!

A 9-Step Process to Set Up an Essential Skills Program

9

An overview of the nine-step process to create an essential skills program

Step 1 – Educate management and union members and get support for the activity.

This section of the manual contains information about essential skills issues and training for you to share with management and union members. People will be more likely to commit to this type of programming if they understand the issues and process for establishing a program.

Step 2 – Set up an advisory committee to guide the process.

The section addresses the questions of the roles and responsibilities of an essential skills advisory committee.

Step 3 – Plan and conduct an essential skills learning needs assessment.

This section provides a process for planning and conducting a needs assessment and for analyzing and reporting the findings.

Step 4 – Make decisions about programming based on the needs assessment findings.

This section of the manual provides suggestions for making decisions about the type of program to offer, and when and where to offer it.

Step 5 – Develop a Communication Plan to inform people about the program.

This section makes suggestions for ways to communicate information about the program.

Step 6 – Develop an Evaluation Plan.

This section discusses the need for an evaluation plan prior to the program's commencement and provides two models of evaluation plans.

Step 7 – Develop an Action Plan.

This section of the manual discusses the need for an Action Plan to carry out those decisions made in Steps 4 and 5, and provides a generic model.

Step 8 – Deliver the program.

This section contains tips for administering the program delivery.

Step 9 – Sustain the program.

This section discusses how to sustain the program.



Notes

Educate management and union membership about essential skills issue

One of the reasons why essential skills training is not on the workplace training agenda is because employers are often simply unaware, of the issue. Employers assume that because people attended school in their youth they have the skills they need. They may not realize that time and change can create a need for people to enhance or refresh their essential skills.

The union membership also needs some awareness about the issue. They need to be able to talk about how their essential skills have been impacted by change and be able to confidently participate in any essential skills training. A first step is understanding the issue.

This section of the manual provides you with an information toolkit that includes an article that may be placed in workplace or union newsletters or on websites (please see a copy of the article in the Appendix of this manual), and a Power Point presentation for display at employer or union meetings. A CD ROM version of this presentation is included with this manual. This means that you do not have to take the time to copy out or re-create the documents in this section.

An Essential Skills presentation is also included on the DVD. Contact the Education Representative for companion documents to any presentation you make, you can get copies of the essential skills needs assessment final report to distribute.

You might also want to use the information about the International Adult Literacy Survey found earlier in this manual.

Essential Skills for working, learning and living

What are the essential skills of today?

Today, the essential skills are reading, writing, math, oral communication and computer skills, but that has not always been the case. In earlier times, a strong back was often more valued than intellectual skills, especially “academic” skills. However, today we live in the knowledge society, the information age, and what matters is the ability to communicate in writing or speech, calculate, read, and use computers.

Isn't this just an issue for kids in school, who have to acquire these skills?

No, it's an issue for adults' concern as well. Our work, community and home lives are undergoing change at a rapid rate. These changes place more and more demands on us to use these essential skills efficiently and effectively.

Take Phil, for example. Phil has been a laundry truck driver for 20 years. He knows this job inside out. Recently though, he was placed into a lead-hand position. With that change came a new demand for him to use effective oral communication skills, to understand company financials, to read more paperwork than he'd ever had to deal with and to write reports. He was a little overwhelmed because, as he said, “I have been driving around in a truck all these years and just didn't have the need to use those skills.” Phil did complete high school so lack of educational achievement wasn't the issue. But if we don't use skills we may lose skills and so have to refresh them when change demands their use.

Promotions are not the only change that might create a need for a person to refresh essential skills. Sometimes it may be that workers have extra duties assigned to them that require them to use essential skills in new ways. For example, in a recent survey 81% of AUPE members who participated said that as part of their job they are doing a lot more reading than ever before and that there just isn't the time to go through it slowly – they need to read faster and understand quickly. Similarly, government workers and healthcare workers who deal daily with the public find oral communication a challenge. The general public is more knowledgeable and so much more demanding of front-line customer and client service workers. These workers may benefit from an opportunity to refine and expand their oral communication skills.

If an AUPE member wanted to brush up on these skills, who can the member talk to about it?

AUPE has been an advocate for essential skills training opportunities for many years. The AUPE Education representative can refer the member to an essential skills program in his or her local area, or can organize for a group workshop if preferred.

Reading • Writing • Math • Oral Communications • Computer skills

They are essential skills for today ... and tomorrow!

Power Point Presentation – available on CD ROM or on website

Slide	Notes to slide
<p>Essential Skills Reading, Writing, Math, Oral Communications and Computer Skills</p>	<p>These five literacy skills are termed essential skills because they are the foundation for working, learning, and living. Change affects how we use these skills and change may create a reason to enhance, broaden or refresh these skills.</p>
<p>Literacy definition Being literate is the ability to use print information, numbers, computers and speech to accomplish one’s goals and realize opportunities and potential.</p>	<p>Education grade levels do not define literacy levels. Anyone with any education level might at any point need to use their literacy skills differently or better and so need training to enhance them.</p>
<p>Other skills associated with Essential Skills Thinking skills – problem solving, decision making, organization and planning, creative thinking Working with others Continuous Learning</p>	<p>These other skills support the use of essential skills. For example, a person might have to use numbers to create a work schedule, in which case he uses math and organization and planning to do so.</p>
<p>What kind of reading do we do? Policies, procedures, emails, collective agreements, product information, bulletins, safety and other regulatory information, contracts, training materials, instructions, trade magazines, meeting minutes, shift and other reports, union by-laws, equipment manuals</p>	<p>The amount of reading required is increasing. In fact, during the AUPE Essential Skills Needs Assessment, 81% of those surveyed said that the biggest effect of change on their lives was an increased demand to read. And 45% found reading collective agreements very challenging.</p>
<p>What kind of writing do we do? Emails, notes to co-workers, instructions, shift and other reports, meeting minutes, training assignments, forms, letters, documentation of every kind</p>	<p>49 % of participants in the Needs Assessment said that the most challenging thing about writing was getting the ideas in their head down on paper – expressing ideas in print.</p>

Slide	Notes to slide
<p>What kind of math do we do? Imperial/metric conversion, budget and money math, measurement math, geometry, algebra, estimation, scheduling</p>	<p>For example, a Printing Machine Operator may measure dimensions when reducing or enlarging documents; may count and record waste copies for each job to account for all paper used; or may weigh and measure volumes of ink and chemicals. All occupations use math in one way or another. And we use it to run our households every day.</p>
<p>How do we use oral communication skills? Ask questions, ask permission, give instructions, give information, explain, debate, persuade, listen and reply, listen and follow instructions, watch for non-verbal messages, provide non-verbal information, public speaking</p>	<p>Oral Communication was identified as the number one essential skill many AUPE members would most like to improve. And 51% said that any public speaking was challenging for them. If people fear speaking up in public, they may not feel equipped to participate fully at union meetings – just keep their ideas and opinions to themselves.</p>
<p>How do we use computer skills? Send and receive emails, conduct internet search, use software programs, use toolbar functions, troubleshoot technical problems</p>	<p>Many members say they did not receive enough formal computer training by their employer, and that the training was too brief and they were left on their own to self-teach much of what they had to learn.</p>
<p>How do I begin to address the issue of Essential Skills in my workplace or union? It's an easy 9-step process!</p>	<p>This process works best when it is jointly undertaken by the union and management, together. The joint process takes the union and management beyond the borders of their usual relationship in a very positive way.</p>
<p>Step 1 Educate Management and Union members and get support for the activity.</p>	<p>Union members and management may need some information about essential skills before they can consider undertaking a project in this area. Awareness raising also encourages support for an idea or activity.</p>



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<p>Step 2</p> <p>Establish an advisory committee that will guide the process and ensure both the union and management can make an equal contribution.</p>	<p>Most essential skills committees have two representatives from the union and two from management.</p> <p>Usually an essential skills educator facilitates the committee meetings.</p> <p>The role of the advisory committee members is to provide knowledge and advice to the educator because of their in-depth knowledge of the employer, union, workplace culture and operations.</p>
<p>Step 3</p> <p>Plan and conduct an essential skills needs assessment.</p> <p>Communicate information about the needs assessment to members so that they are informed and better prepared to participate.</p>	<p>The needs assessment accomplishes two important things:</p> <p>It establishes if workers have an interest in and need for an essential skills program, and if so, what it should look like.</p> <p>It provides an opportunity for workers to examine how they use essential skills and to ask questions about essential skills training prior to any program being offered. It also reveals any barriers or incentive that may deter or encourage participation.</p>
<p>Step 4</p> <p>Make decisions about programming based on an analysis of the findings.</p>	<p>Usual types of essential skills programs are: one-to-one tutoring, small workshop, or drop-in learning centre where people work on individual learning goals at their own pace.</p> <p>The “when” issue is not only about what time of day/year is best for the program to run, but also addresses the question of whether the program will be offered on employer time or employee time or both, shared.</p> <p>Where the program is offered depends on the type of program chosen and the facilities available.</p>
<p>Step 5</p> <p>Develop a Communication Plan to inform people about the program and invite participation in training.</p>	<p>Developing a Communication Plan is a good idea because the communication of information will then be timely and appropriate.</p>

Slide	Notes to slide
<p>Step 6 Develop an Evaluation Plan.</p>	<p>A program of any type requires on-going evaluation to ensure that it is relevant and meeting the needs of learners and stakeholders. A plan is needed to identify key audiences and monitoring points throughout the program.</p>
<p>Step 7 Develop an Action Plan.</p>	<p>A step-by-step action plan is needed so that the setting up of the program is strategic.</p>
<p>Step 8 Deliver the program.</p>	<p>The program delivery is the culmination of much planning. On-going monitoring throughout delivery is required to ensure that the content and format is meeting learners' needs.</p>
<p>Step 9 Sustain the program.</p>	<p>On-going evaluation and effective administration will help ensure the sustainability of the program.</p>
<p>What are the benefits of essential skills programming? Enhances job security and opens the door to career advancement opportunities. Equips union members to participate more fully in their union</p>	<p>When union members are not confident of their speaking, reading or writing skills they are often reluctant to attend or participate fully in union meetings. Increased union participation is one positive outcome of essential skills training. The employer benefits too. A higher skilled workforce is every employer's competitive edge!</p>
<p>How can I find out more? Contact the:</p> <ul style="list-style-type: none"> • Education representative within AUPE • National Adult Literacy Database site http://www.nald.ca • Alberta Workplace Essential Skills committee http://www.nald.ca/AWES/start.htm • Local community college • Western Workplace Education Skills Training Network site http://www.nald.ca/wwestnet/index.htm 	<p>All of these contacts can provide you with resources and information.</p>

Set up an advisory committee to guide the process

“A committee is a group that keeps minutes and loses hours.” ~Milton Berle

Committees, like meetings, have a bad name because they are often unproductive. The cause of that lack of productivity may be a lack of leadership, a lack of commitment on the part of the members, or disorganization.

Let's examine what qualities a good committee has:

- The purpose of the committee is clear.
- The meetings are timely and necessary.
- The atmosphere is relaxed and informal to encourage people's comfort contributing ideas.
- There is respect among committee members.
- Effective leadership is provided.
- Members are interested and committed.
- The committee process is organized and purposeful.
- Recognition is given to members' contribution.
- Action results from decisions and plans.
- Stakeholders outside the committee are informed of its activities and achievements.

What is the purpose of an Essential Skills Advisory Committee?

The purpose of an Essential Skills Advisory Committee is two-fold:

- a) to provide the essential skills facilitator with advice and resources
- b) to act as a liaison between the essential skills facilitator and the employer and union

Who should be on an Essential Skills Advisory Committee?

Ideally, any essential skills initiative will be a process jointly supported by the union and the employer. In that case then, of course, representation on the committee must be balanced by the involvement of both parties. Usually, an essential skills committee consists of at least two union representatives and two management representatives.

These representatives should be people who have a commitment to education. It may be that they do not know a lot about essential skills education specifically when they first come together, but the essential skills educator can help by providing an essential skills orientation workshop to the committee members. The power point presentation found earlier in this manual could be used as an orientation workshop presentation.

What is most important is that the members are dedicated to education and wish to include essential skills training as part of the education agenda. If an education committee already exists, then the Essential Skills Advisory Committee could be a sub-committee of that committee. In any case, it is important that these two committees communicate often.

What will committee members be required to do and contribute?

1. Members will be required to meet face-to-face periodically.

It's a good idea for the committee to look at the work that needs to be done and decide when meetings might be necessary and helpful. Electronic communication might be possible, depending on members' access to computers and internet technology.

2. Members will be required to be sufficiently informed about the essential skills initiative to be able to respond to co-workers questions on the topic.
3. Members will provide information to the essential skills facilitator about the culture of the workplace, products and services, organizational structure and issues that may affect essential skills programming, for example, shift work schedules.
4. Members will help plan and support the essential skills initiative, for example, help plan any needs assessment, the communication plan and evaluation plan.

Plan and conduct an essential skills needs assessment

An essential skills needs assessment is critical to any essential skills programming because it establishes two things: if there is a need for essential skills programming and an interest in essential skills programming among the workers; and if there is, what that program should look like in terms of content and delivery.

Here is a brief overview of the essential skills needs assessment process:

1. Map the workplace.

This strategy helps the essential skills needs assessment facilitator understand the workplace and variables that will impact the needs assessment process.

2. Design the needs assessment.

This step involves setting goals and objectives for the assessment, identifying audiences and mechanics (when, where and how) of the assessment, designing needs assessment questions, and creating a work plan, communications plan and evaluation plan.

3. Create and implement a communication plan

This step ensures that those involved in the needs assessment (likely workers, management and union officers) understand why it is being conducted, when it will be conducted and how it will be conducted.

4. Conduct the assessment.

This step involves gathering information according to the needs assessment design strategy created in Step 2.

5. Analyze the information.

Analyze the information to determine interest, need, types of need, and workplace issues that may impact training.

6. Write the report.

Document the findings in both a full report and a summary report.

7. Present the report.

Your communication plan will have determined to whom, when and how you will present the report. Revisit the plan to see if changes need to be made.

8. Evaluate the needs assessment process and outcomes.

9. Write a short evaluation report.

Here is more detail about the process.

1. Map the workplace.

Please see the Appendix 1 for a form that you can use to map the workplace. This mapping is done by the essential skills facilitator and the advisory committee. The committee has the knowledge to complete the form and the facilitator will use this information to help design the questions to be asked during the assessment and to better understand the various audiences involved in the assessment.

2. Design the needs assessment.

2.1 Develop goals and objectives

The first step in designing the needs assessment is for the Advisory Committee and essential skills facilitator to develop a set of goals and objectives for the needs assessment. Goals and objectives are not the same thing. Goals are broad; objectives are concrete, specific, actions that are taken to achieve that goal. Examine the example below to see the difference:

GOAL	To learn the history of AUPE
OBJECTIVE	Search the AUPE website for information relating to history.
OBJECTIVE	Ask AUPE Research Officer for documents that describe AUPE history
OBJECTIVE	Interview AUPE President for historical information

All of the objectives are actions that are taken to achieve the goal. The goal “to learn” is very broad, but the objectives’ verbs, “Search”, “Ask” and “Interview”, are very specific and active.

It is sometimes helpful, too, to detail the outcomes of the achievement of the goal. The chart below provides an example of needs assessment goals, objective and outcomes that were designed for the AUPE province-wide needs assessment conducted in 2002-2003.

GOAL	OBJECTIVES	OUTCOMES
To ensure that the project is inclusive of all stakeholders	Establish a project team comprised of various stakeholders	<p>Advice for project activities from a variety of perspectives</p> <p>New or increased awareness about the issue by stakeholders</p> <p>New champions for the issue created</p>
To gather information about people’s perceived Essential Skills learning needs from a broad sample of AUPE members	<p>Conduct focus group discussions with a variety of employees in various occupations and work-sites</p> <p>Develop a questionnaire survey to allow people to give their ideas if they were unable to attend a focus group discussion</p>	<p>Information about people’s perceived Essential Skill learning needs in the context of their specific workplace and occupation</p> <p>Enhanced awareness by the membership, union leaders and employers of the issue</p> <p>Prompt receptivity and thought about enhancing Essential Skills</p> <p>Enhancement of the AUPE Education portfolio</p>
To raise awareness of the issue and the project among the general membership	<p>Publish an article about the project in Direct Impact</p> <p>Make presentations at Local and Area Council Meetings</p> <p>Present Needs Assessment findings at the annual convention</p>	<p>Enhanced awareness by the membership of the issue</p> <p>Prompt receptivity and thought about enhancing Essential Skills</p> <p>Prompt dialogue about the issue</p>

GOAL	OBJECTIVES	OUTCOMES
To make recommendations for programming in response to the Needs Assessment findings	Report findings to the Project team and create recommendations Present recommendations to membership and inform of next steps	Directions for appropriate Essential Skills programming for AUPE members
To evaluate the process and the outcomes of the activities	Develop evaluation strategy in consultation with project team	Information and recommendations for future work of this nature

2.2 Decide how information will be collected and from whom.

The two usual approaches to collecting information are focus group discussions and one-to-one interviews. If the target audience is large, then sometimes these two approaches are supplemented with the use of a paper or on-line survey. The survey should ask the same questions as those that were asked during the focus group discussions and interviews to ensure some consistency of information. The AUPE province-wide needs assessment employed all three approaches to gathering information. This is a decision that the essential skills facilitator and the Advisory Committee can make together.

The usual audiences for the collection of information are union members, union leaders and management representatives.

2.3 Create the needs assessment questions.

To some degree, the questions asked are tailored to the nature of the workplace but generally speaking, essential skills needs assessment questions seek to:

- identify recent changes in the workplace that may affect skill use
- identify how change has impacted people's use of essential skills
- identify what they have to read, write, use communicate orally, calculate using math and accomplish using a computer
- identify what they may find challenging about using any of these essential skills
- find out what kind of employer-sponsored training is available to them
- find out what kind of union training is available to them
- find out what barriers may prevent them from taking training
- find out what motivates them to take training

- ask them how they prefer to learn (one-to-one, small group, computer based)
- ask when it might be most convenient for them to participate in training
- ask them where training should take place (union hall, workplace, etc)
- ask them to rank their essential skills learning priorities

The same questions should be asked of all audiences – members, union leaders and employers alike. However, the questions may be phrased slightly differently to better relate to the different audiences. For example, on the topic of motivation, the questions might be asked like this:

Members:	What motivates you to take training?
Employers:	What strategies or incentives do you have to motivate employees to take training?
Union Leaders:	Are you aware of any incentives or motivational strategies that the employer uses to encourage employees to take training?

Be sure to create the questions in plain language; this is especially important if you choose to conduct a paper or online survey. Be sure to pilot the questions to ensure they produce the information needed.

Develop an action plan.

Once the goals and objectives have been determined and it has been decided how to collect information and from whom, an action plan should be created that details a path, complete with timelines, for carrying out the needs assessment. There may be an adjustment to the action plan along the way, but it is helpful to determine at the outset a general plan or schedule.

Develop an evaluation strategy.

It is important to develop the evaluation strategy as part of the design process because that plan allows the process to be monitored and the evaluation information collected will be included in the final report. To create an evaluation plan, first identify the audiences that will want information about the needs assessment process and results and what kind of information each audience requires. Then identify how best to collect or get that information. This means that the evaluation questions asked of members will be different than those asked of management or union leaders because each group had a different interest in the activity.

Some questions you might want to ask members who participated in the process:

What did you enjoy about being part of the needs assessment process? Was there anything about the questions or the process that made you uncomfortable? Have you any final comments about your involvement in the process?

Some questions you might want to ask union leaders:

In what way do you think the Union benefited from being involved in the needs assessment? How will the Union use the findings of the needs assessment? What would you have changed about the process, if anything?

The same questions can be asked of management to get their perspective.

In what ways do you think the organization benefited from the needs assessment? How will the your organization use the findings of the needs assessment? What would you have changed about the process, if anything?

3. Communicate the needs assessment plans.

Communicating news about the needs assessment is important because it helps prepare people for the activity and helps diminish fear and suspicion by explaining why, when and how it will happen.

Create a communication plan that identifies the audiences and the best vehicles for conveying information. For example, the Advisory Committee might be able to suggest employer or union newsletters that could carry information about the needs assessment if the publication timelines happened to be accommodating. Bulletin boards might carry information. Presentations at meeting are especially effective.

Think of all of the ways and places that information about the activity could be displayed. Your communication plan should also include a schedule for issuing a final report

4. Conduct the needs assessment.

4.1 Because of the planning, conducting the assessment is easy. Some tips for conducting focus group discussions:

- Prepare a face sheet that identifies the work group type and date of the interview. You may also wish to have people identify their occupation or position. Names are usually not recorded to ensure anonymity.
- Assemble a group from a common work area whenever possible so there is a measure of reliability and validity to the statements made.
- Host discussions with people from a variety of work areas in the workplace.
- Ideal group size is 6-8 people.
- A moderator is needed to ask questions and guide the discussion
- A note taker is needed so that the moderator can focus on guiding the discussion.
- The moderator should provide participants with background information and should make clear the purpose of the discussion. Also, indicate that notes will be taken but that people's names are not required to ensure anonymity. If you intend to record quotes, ask permission to do so, again assuring them of anonymity. Ask if there are any questions before proceeding with the discussion.

- The moderator should remain neutral during the discussion; that is, listen objectively without conveying opinions.
- The moderator should guide the discussion, ensuring that participants stay on topic and do not get sidetracked into discussing unrelated issues.
- The length of the discussion is dictated by amount of information requested of participants and the amount they have to give.

4.2 Tips for conducting one-on-one interviews:

- Prepare a face sheet that identifies the interviewee's position in the union or employer and the date of the interview.
- Provide background information and purpose of interview. Ask if there are any questions before proceeding with the interview.
- Take notes.
- Throughout the interview, encourage the candidate to provide examples of statements made.
- Do not lead the candidate by making a statement and then asking for an opinion, for example "Employees here don't seem to get much training. Why is that?" Instead, ask the question "What training do employees get at this workplace?"
- Allow time for the person to consider their answer.
- Wrap up the interview by explaining that you will be showing them a transcript of your notes once you have them transcribed so that they can check for accuracy.
- Focus group discussions and one-to-one interviews are useful because they provide rich, narrative data. Quotes can be recorded that often provide colour in the final report.

4.3 Tips for creating a multiple selection survey:

- Use the same questions that you used for the focus group discussions and interviews.
- Analyze your focus group discussion notes and identify the most common responses to the questions. Use these common responses to create a slate of response choices for each question.
- Develop a plan to distribute the survey, collect the completed surveys and tabulate the data.

AUPE offers an online survey service.

Surveys are excellent because they yield tabulated data and so the information is quantifiable.

5. Analyze the needs assessment information

Type the discussion notes and then review the notes looking for key words and concepts that recur. You'll want to count each instance of a key word or concept. Most word processing programs have a "search and find" feature that will find and count specific words and phrases.

The next step is to group the key words and phrases into several categories. Each category should have from three to ten key words or phrases. All comments should fit into at least one category. Some comments may have several key words that fit into different categories. Key words and phrases should be coded for (1) central theme and (2) general sentiment (positive, negative, neutral, suggestion).

After the key words and phrases have been grouped into categories, the interpretation step begins. Central themes and issues will emerge. Note which themes and issues are mentioned most frequently.

Tabulating online survey data is easy because online survey programs tabulate the data automatically and analysis is easy because you can easily rank people's responses and identify popular responses that way. The example below shows how data for the AUPE Essential Skills Needs Assessment was electronically tabulated.

Changes on the Job

1. What changes have you seen on the job in the last 5 years?

	Responses	% of Total
Introduction of new equipment and technology	245	61.5
Computerization of systems and operations	249	61.7
New regulations to know and follow	246	61.0
New policies and procedures to know and follow	278	68.9
Clients more knowledgeable and demanding	189	46.9
Increased workload	294	72.9
Fewer staff to share the workload	261	64.7
Increased documentation required	242	60.0
More culturally diverse workforce	129	32.0
Lower morale	277	68.7
Aging workforce	208	51.6
Increased hiring requirements (Education the hiring criteria over experience)	153	37.9

Others
Not Categorized 0/3 100 %

My Comments about these changes
Not Categorized 0/3 100 %

It is easy to see that “Increased workload” was most frequently selected by survey respondents, followed by “Lower morale”.

After the findings have been analyzed, the Advisory Committee and Essential Skills Facilitator should create recommendations. The recommendations provide a blueprint for “next steps”.

6. Write the report.

The findings and recommendations need to be documented in a report. Report formats vary, but generally speaking the format is as follows: title page, table of contents, acknowledgements, introduction (which is usually background to why the needs assessment was done), methodology (how the needs assessment was carried out), findings and recommendations. Sometimes, an executive summary report is written too so that people can read highlights, of the activity. AUPE headquarters has a copy of the full report of the province-wide essential skills needs assessment that can be used as a model for writing.

7. Present the report.

Ideally, your Communication Plan will have included a plan for how to present the report. Perhaps the report can be posted on the Local website and the organization website. Perhaps an executive summary report, if one has been created, can be distributed at a Local meeting. The Advisory Committee likely has the best advice to give about effective vehicles for presenting the report.

8. Evaluate the needs assessment process and outcomes.

The usual audiences for the evaluation are the stakeholders who were involved: union leaders, members and management representatives. The evaluation plan developed during the needs assessment design phase will dictate how the evaluation is carried out.

Make decisions about programming based on the needs assessment findings

Goals and objectives

The first step is for the Advisory Committee members to discuss, from their varying perspectives, what goals and objectives they see and would like to establish for the program. Remember, goals are broad and objectives are concrete actions that will be taken to achieve that goal. For example, one goal of the project might be to involve a certain number of employees in the program. Objectives would state ways in which that goal could be achieved.

Delivery formats

The needs assessment participant responses to questions shape the discussion for making decisions about what the programming should look like, if it has been determined that programming is desired and needed.

The findings should tell you what the majority of participants in the needs assessment prefer in terms of the type of programming. Common types of programming are:

* **One-to-one peer tutoring**

This approach provides individualized instruction and maximum flexibility. Typically, a Learning Coordinator provides training to volunteer peer tutors and then matches a tutor and student. The pair decides the learning path together and when and where it is most convenient for them to meet. Pairs usually meet about once or twice a week. The Learning Coordinator provides support to the pair.

* **Computer based essential skills learning**

Computer software programs for building essential skills are available commercially. Check the Internet for these resources or contact Literacy Alberta (see Appendix 5 for contact information for Literacy Alberta) for recommended computer software programs.

An e-learning workplace essential skill building program is available (Spring 2005) online at Bow Valley College. Building Workplace Essential Skills Online (BWESO) offers Web-based instruction in essential skills such as reading text, document use, and numeracy, and features the use of authentic workplace documents and re-created tasks as source materials. The BWESO program is facilitated by qualified instructors who monitor learner progress and offer guidance when challenges arise.

* **Small group workshops**

Another format for delivering workplace essential skills training is by organizing occasional small group workshops, as required and as is convenient. For example, an essential skills facilitator may post a notice for a budget math skills workshop and people sign up if they are interested. This type of curriculum, as well as other essential skills curricula, are available for purchase and so need not be developed unless there is a need for a curriculum customized to the particular workplace.

** These are all subsets of “Delivery Formats”*

Such curricula can be found by searching the National Adult Literacy Database <http://www.nald.ca>

* **Drop-in Learning Centre**

A Drop-in Learning Centre is usually located either on employer premises or at a union office. It is typically staffed by a Learning Coordinator who helps identify individual learner goals and needs and guides the student through the learning. A Drop-in Learning Centre usually allows the student to work one-to-one with a volunteer tutor, to participate in small group workshops or to learn using computer-based programs. A Drop-in Learning Center allows students to learn at their own pace and is very accommodating of individual learning styles and needs.

Program location

The location of the program is dictated by three things: by where needs assessment participants indicated they would most prefer, by the type of delivery chosen, and by the availability of space.

Program schedule

When learning should take place depends on four things: on needs assessment participants' stated preference, on members' work schedules, on the type of delivery chosen and on the production/service cycle of the workplace. For example, some workplaces have a high season and a low season. Take this into account as you plan when to offer programming.

Barriers

One of the key things that the needs assessment should address is barriers that may prevent people from participating in training. During the program planning process, be sure to review the barriers and take issues that people have raised into account. For example, lack of time is very often cited as a barrier; that is, people have too many life and family commitments to do training on their own time and are often too busy in their jobs to take training on organization time. Travel may be another barrier. If people have to travel a distance to take training, that demands time and money. Try to minimize barriers when you plan the program.

Recognition

Decide how learning will be recognized. Consider creating a certificate of participation.

Staffing

The staffing of the program depends largely on the delivery format chosen. A Learning Coordinator is required for all of the formats described above, but if a peer tutoring model is chosen, then volunteer tutors are needed for staffing as well. The Learning Coordinator may be a half-time position or a full-time position depending on the participation level.

Develop a Communication Plan to inform people about the program

Just as a Communication Plan was required in order to inform people about the Needs Assessment, so too is a Communication Plan required to inform people about the program. The Advisory Committee, whose members are familiar with organization and union communication vehicles, can provide a lot of information and advice while the Essential Skills Facilitator can guide the communication planning process.

Take a persuasive and positive approach

The Communication Plan is also a promotional plan of sorts. At the same time that it informs people about the program it should also promote the program so there should be a persuasive element to the communication.

For example, to inform people and promote a reading comprehension program at an Alberta company a flyer was created that asked:

“Want to read faster and understand more?”

Well, who wouldn't! That question took a positive approach to attracting people's attention by suggesting the benefits of the program – being able to read faster and get more out of what one reads.

Avoid negative messages in your communications, such as “Do your reading skills need improvement?” People's most immediate response will be “no” because the message suggests they have a deficit. Moreover, even if they do acknowledge that their skills are lacking, they may be reluctant to come forward and sign up because of the negative, deficit association.

Some ideas for ways to communicate news of the program:

Article in employer or union newsletter – You can use the article in Step 1 “Educate management and union membership” and tag on an announcement about the program. You can put subsequent, short update articles in each newsletter edition, just describing what’s going on in the program so that people become familiar with it.

Luncheon presentation – You can make a brief presentation at noon in the lunch area talking about essential skills and describing the work of the program.

Employer and Union meetings – You can make a brief presentation at these meetings to inform people.

Flyer – You can use a flyer posted around the workplace to tell people about the program. Be sure to include on the flyer a union representative’s name and contact information and a management representative’s name and contact information.

Leaflets in pay cheques – This is a great way to communicate with everyone!

AUPE website – This is a popular site for members and offers a lot of exposure to the program and program activities.

Word of mouth - Encourage people to talk to others about the program.

To create a plan for communicating information, you may wish to use a table that identifies when you will communicate, what news you will communicate, and how you will convey the communication. The Communication Plan is something of a living document in that it can be reviewed and amended.

Develop an Evaluation Plan

Develop an evaluation plan at the outset of the program so that you have a strategy and timeline for monitoring its progress.

The evaluation plan is very much shaped by the type of the program and the format of delivery.

In Appendix 2 & 3 of this manual are sample evaluation plans for a program that offers periodic workshops, although this plan might equally apply to a Drop-in Learning Centre program, a sample evaluation plan for evaluating a peer tutor program is also included.

Develop an Action Plan

The action plan is shaped by the decisions made in Steps 4 and 5 and is a road map for getting the program up and running.

Sample Action Plan for Learning Centre Operation

TASK	DATES
Identify a suitable location for the Learning Centre, keeping in mind preferences stated by Needs Assessment participants.	
Identify human, material and equipment resources required and acquire them.	
Determine operating hours	
Create a process for people to “enroll”	
Communicate information about Centre openings, services, and “enrollment” process	
Devise a participation tracking system	
Launch the Centre	
Commence programming and on-going evaluation according to evaluation plan	
Continue to communicate information about the Centre	

Details specific to the actual activity can be added into this plan but this provides a general framework.

Deliver the program

The instructional and administrative responsibilities for delivering the program vary with the model chosen, although there are some shared areas.

All program models require that:

- the instructor ensure that the curriculum and learning is relevant to the individual or group needs.
- the instructor(s) teach in accordance with adult learning principles.
- learning is recognized in some fashion (certificate of achievement).
- individual participant's assessments remain confidential information.
- individual participant's progress remains confidential.
- program evaluation is conducted on an on-going basis.
- administrative tasks such as budget management and record-keeping, be maintained.

Variances related to program model chosen:

In a peer tutor program, the Learning coordinator will have to provide training for tutors to familiarize them with literacy tutoring strategies. The Learning Coordinator will also have to match tutors with students and maintain records for the matches made. Tutors may also need help identifying appropriate learning resources and developing individual instructional plans.

In a program that offers regular or occasional workshops, the Learning Coordinator will need to be responsive to the changing learning needs of members at a particular workplace. It is important to monitor workplace and organizational changes in order to ensure that workshops offered are responsive to new and emerging trends.

In a Drop-in Learning Centre program, the Learning Coordinator will need to be sure that the hours of operation are convenient to the various shifts of members to ensure that the facility is accessible to all. Moreover, because the Centre is “drop-in”, it is important to record participation times and rates in order to make adjustments to the operation as required.

The issue of program sustainability is an important one and requires a continual commitment on the part of the union, management and members.

6 Tips for sustaining the program

1. Evaluate, evaluate, evaluate. On-going evaluation of the program provides for the opportunity to make adjustments that are responsive to change, thereby ensuring the viability and relevance of the program.
2. Keep stakeholders involved. The Communication Plan will have identified key points to keep stakeholders informed. The evaluation plan will have identified key points to keep stakeholders involved in the overall program operation and the decision-making for improvement. Maintain regular Advisory Committee meetings to sustain stakeholder commitment and participation.
3. Ensure that instructional resources, equipment and supplies are current.
4. Seek measures to ensure the program is adequately funded.
5. Document success. By documenting the successes of the program, you can build the case for continuance.
6. Negotiate contract language. Negotiating contract language helps ensure that essential skills programming remains in the training agenda and that it meets the needs of members. Please see the appendix 4 for samples of contract language that have been used by other unions.



Type of workplace

AUPE Sector -----

Health Services Provincial Government

Education Boards, Agencies & Local Government's

Employer's Business -----

Hours of operation -----

Shift schedules -----

Work location (one site, multi-sites) -----

Size of Workforce

Total number of workers -----

Total number of unionized workers -----

Number of unions -----

Change in workforce size past 5 years? -----

Change in workforce size anticipated? -----

Composition of unionized workers

Gender - % Males -----

 % Females -----

Age - under 25 -----

 25 – 34 -----

 35 – 44 -----

 44 – 55 -----

 over 55 -----



Mapping the Unionized Workplace

Countries of origin represented _____

Languages spoken _____

Education and skill requirements

Does the employer have a pre-requirement for hiring? _____

Did the company have a pre-requirement 5 years ago? _____

Does the existing workforce meet the pre-requirement? _____

Does the existing workforce need the pre-required skills to do their jobs? _____

Are there formal education requirements for new job openings? _____

If yes, do members meet those requirements? _____

What education and training does the employer provide? _____

Are members satisfied with the employer-sponsored education and training offered?

Why or why not? _____

What is the process for selecting workers for employer-sponsored education and training? _____

Do members frequently access Union education and training? _____

Are members satisfied with the Union education and training? Why or why not? _____



What is the process for selecting members for Union education and training? _ _ _

Does the employer offer training incentives (time off, bonus pay)? _ _ _ _ _

Are members generally aware of this benefit? _ _ _ _ _

What are some barriers that may prevent members from taking training? _ _ _ _ _

Employer profile

Is this employer: Local ----- Provincial _ _ _ _ _

Does this employer have multiple locations? _ _ _ _ _

What have been some recent changes in this workplace? _ _ _ _ _

What are some anticipated changes? _ _ _ _ _

Union profile

Who are the officers of the Local(s)? _ _ _ _ _

What committees does the Local have? _ _ _ _ _

What have been some recent changes in this Local _ _ _ _ _

What are some anticipated changes? _ _ _ _ _



Mapping the Unionized Workplace

Management Structure

Draw an workplace organizational or department organizational chart here, showing executive management positions, departments, middle management positions, supervisory positions, etc.



Employer Communications

Newsletters – Title _____

Frequency _____

Bulletin boards – Locations _____

How does management most often get information out to employees? _____

Management/Labour relations

Is the relationship between management and the Union:

Very Good Good Bad Very bad

By what mechanisms does management communicate with the Union? _____

In what joint initiatives have management and the Union been involved? _____

Are there any historical points of significance in the history of relations between management and the Union? _____

When is the next contract negotiation? _____

What are the issues? _____



Notes

Sample Program Evaluation Plan

2

Appendix

This plan assumes that the Essential Skills Program Coordinator will be responsible for evaluation activities.

Evaluation question/activity	Ask who	Ask when	How
Conduct workshop evaluation	Workshop participants	After each workshop	Brief questionnaire
Conduct impact evaluation (How are you using your new skills on and off the job)	People who have taken a workshop	1 month after workshop, then 3 months after workshop	Interview
Conduct impact evaluation (Have you noticed any changes since person took workshop?) *	Union leaders and or supervisors	3 months after workshop	Interview
Conduct mini-needs assessment to find out what other/new courses might meet needs and interests of members	Members, including those who have taken workshops	Regularly	In person, flyers, company and union newsletters, at company and union meetings
Ensure program is fulfilling goals and objectives	Advisory Committee members	Once per month	Review and discussion at monthly meetings.
Track and document participation in workshops, workshops offered and training hours	N/A	On-going	Use database to record
Evaluate effectiveness of communication activities	Members, union leaders and management reps	Once per month	Random interviews, email surveys
Monitor financial and material resources		On-going	Maintain financial spreadsheet and inventory of materials
Write activity reports	N/A	Once per month	Submit to Advisory Committee at monthly meetings

* A word of caution: not all learning is evident itself on the job because often the job may not require extensive use of those skills. In fact, there then be no way for supervisors to note a change. The skill development may not be visible, but may yet be there.

Sample Peer Tutor Program Evaluation

This plan assumes that the vehicle for collecting information will be personal interviews with tutors, students, union officers and management representatives. Evaluation should occur every three months. Below are sample questions for the different audiences. Note that responses to these questions may prompt additional questions on that particular topic.

There are also questions provided that relate to program administration, an assessment of which should be a part of the program evaluation activity.

Sample questions for Tutors

Did the initial tutor training you received adequately prepare you for your tutor role?

Is there any training you would like relevant to your tutor role?

What is going well for you and your student?

What difficulties are you experiencing?

Are you satisfied with the progress your student is making?

Are you satisfied with the learning materials that are available to you?

What additional resources or learning materials do you require?

How has the tutoring changed you as a person, if at all?

Sample questions for Students

What is your particular goal for working with a tutor?

Is the tutoring helping you toward this goal?

What is your focus for learning?

Are you satisfied with your learning progress?

Are you satisfied with the learning materials?

Are there other learning materials you would like?

Can you think of any changes that you've noticed on the job or at home since you began the learning?

Sample questions for management

Why did the organization support this program?

In what ways does this program benefit the organization?

What contributions has the organization made to the program?

What additional contributions might the organization make?

Administrative questions

Is the program meeting the goals and objectives that were set out?

Are program records kept that document tutor-student matches, participation levels, tutor training activities, etc.?

Is student progress assessed and documented?

Is the resource collection catalogued and current?

Is the program promoted according to the Communication Plan?

Are monthly meetings held with the Advisory Committee?

Is the program networked with the larger literacy community?

Is the budget monitored and expenses tracked and supported by documentation?

Are alternative funding supports explored?

Letter of Agreement – The Montreal Joint Board, Union of Needleworkers, industrial and Textile Employees

1. The parties acknowledge that literacy skills contribute to employee participation in the workplace and in the broader community and that upgraded literacy skills are in the interest of all concerned.
2. Whenever an agreement is concluded with the Employer, the parties agree to work in good faith to improve literacy skills among employees and therefore:
 - involvement in literacy programs will be encouraged by the parties, but employee participation in such programs shall be voluntary, unless otherwise agreed upon.
 - Any literacy program introduced in the workplace shall respect the dignity and privacy of employees. No employee shall be penalized for a lack of or perceived lack of literacy skills.
3. Any Employer's participation in the establishment of a literacy program for employees by direct financial contribution of resources, time, premises or other, shall be deemed to constitute training expenses for the purposes of the Act to foster the development of manpower training.

Education Funds Managed by the Union – UNITE Local 459

“Each employer agrees to contribute the equivalent of one-quarter (1/4%) percent of Union Member's wages into a Local 459 Education Fund, which shall be solely administered by the Union”

Education Funds Managed Jointly

The Company agrees to contribute fifteen cents (15) per hour to the Union Education Trust Fund for all hours paid and worked by all full time and part time employees to a maximum of (%) per week per employee.

Hours paid and worked as defined and set out in the collective agreement. The Company shall forward the contributions every four (4) weeks to the Union and shall include a list of employees and the number of hours worked by each employee during each four week period.

Fownes, Lynda, Thompson, Elizabeth and Evetts, Julian (Eds.) Numeracy at Work. 2002. Available from SkillPlan, Suite 405, 3701 Hastings Street, Burnaby, BC. V5C 2H6 or order online at www.skillplan.ca. Cost: \$52.00 each for less than 10 copies and \$46.80 for more than 10 copies.

Fownes, Linda and Julian Evetts. Document Use at Work. 2004. Available from SkillPlan, Suite 405, 3701 Hastings Street, Burnaby, BC. V5C 2H6 or order online at www.skillplan.ca. Cost: \$42.00.

Grecki, Sue and Sheila Whincup. Writing at Work. 2003. Available from SkillPlan, Suite 405, 3701 Hastings Street, Burnaby, BC. V5C 2H6 or order online at www.skillplan.ca. Cost: \$35.00 each for less than 10 copies and \$31.50 for more than 10 copies.

Levine, Tamara. "Learning in Solidarity: A Union Approach to Worker-Centred Literacy." Just Labour. Vol. 1, 2002: 86-93. Available on the Canadian Labour Congress Website http://www.clc-ctc.ca/web/menu/english/en_index.htm

Making It Clear. Canadian Labour Congress. Available for \$16 from the Canadian Labour Congress Website: http://www.clcctc.ca/web/menu/english/en_index.htm

The Bottom Line – an annual newsletter issued by the Western Workplace Essential Skills Training Network (see homepage at <http://www.nald.ca/wwestnet/index.html>). Free electronic subscription is available by emailing this request to wwestnet@shaw.ca Back issues are available online at <http://www.nald.ca/wwestnet/Newsletters.html>

Internet links and sites

ABC CANADA Literacy Foundation <http://www.abc-canada.org/>

This site provides a number of resources for family, community and workplace literacy, including a newsletter featuring articles about literacy activities across Canada.

Canadian Labour Congress Workplace Literacy Project http://www.clc-ctc.ca/web/menu/english/en_index.htm

This site provides information about literacy resources of particular interest to union activists.

Conference Board of Canada – Workplace Literacy Central <http://www.conference-board.ca/workplaceliteracy/default.asp>

Workplace Literacy Central is a free resource with information, tools and advice for Canadian organizations and employers who want to raise literacy and basic skill levels in the workplace.

Essential Skills Profiles http://www15.hrdc-rhc.gc.ca/english/general/all_profiles.asp

This site provides a listing and descriptions of how different occupations use essential skills

International Adult Literacy Survey <http://www.nald.ca/nls/ials/introduc.htm>

This site provides information about IALS. IALS, International Adult Literacy Survey, was a seven country initiative conducted in the Fall of 1994. Its goal was to test and compare literacy skills of adults in those countries. Since 1994, more and more countries have become involved, and there are now literacy levels results for 30 countries.

Literacy Alberta <http://www.literacy-alberta.ca/start.htm>

Literacy Alberta supports people involved in literacy activities, and influences public policy. This site contains information about literacy activities in Alberta and can refer you to local literacy programs.

National Adult Literacy Database <http://www.nald.ca>

This site provides a variety of information and resources about literacy and clear language issues.

National Literacy Secretariat <http://www.nald.ca/nls.htm>

This is the Canadian government's site for literacy. This site offers information and resources as well as guidelines for applicants applying for funding.

Videos

Literacy and Life Long Learning, the CEP Experience. 2002. Communications, Energy and Paperworkers Union of Canada. Available for \$10.00. Contact Ian Thorn ithorn@cep.ca

This resource guide suggests some useful print materials, videos and internet links that would be of help to union committee members who are involved in essential skills activities, including setting up a program.

Print Materials

Bargaining Basic Skills: What Unions Should Know About Negotiating Worker-centred Literacy Programs. 2000. Canadian Labour Congress. Available for \$8 from the Canadian Labour Congress Website:

http://www.clcctc.ca/web/menu/english/en_index.htm

Belfiore, Mary Ellen. Understanding Curriculum Development in the Workplace: A Resource for Educators. 1996. Available for purchase from ABC CANADA Literacy Foundation, Publication Fulfillment, 1450 Don Mills Road, Don Mills, ON M3b 2X7 or online at http://www.abc-canada.org/our_publications/ for a cost of \$20 plus \$5.00 shipping.

Building Workplace Essential Skills. Published by Bow Valley College. Instructor and Student Versions available from Gloria Bigelow, Sales and Marketing Assistant, Bow Valley College, 332 – 6 Ave. SE, Calgary, AB, T2G 4S6, 403-410-3200. Instructor version \$100.00, student version \$50.00. Discounts on large orders.

Connon-Unda, Jean. “Seeds for Change: A Curriculum Guide for Worker-Centred Literacy. 2001. Canadian Labour Congress.

Evetts, Julian. “Document Literacy: A Guide for Workplace Educators and Instructors. 1996. Published by and available from SkillPlan, Suite 405, 3701 Hastings Street, Burnaby, BC. V5C 2H6 or order online at www.skillplan.ca. Cost: \$32.50 each for less than 10 copies and \$29.25 for more than 10 copies.

Folinsbee, Sue and Paul Jurmo. Collaborative Needs Assessment: A Handbook for Workplace Development Planners. 1994. Available for purchase from ABC CANADA Literacy Foundation, Publication Fulfillment, 1450 Don Mills Road, Don Mills, ON M3b 2X7 or online at http://www.abc-canada.org/our_publications/ for a cost of \$20 plus \$5.00 shipping.

Folinsbee, Sue and Paul Jurmo. Collaborative Workplace Development: An Overview. 1994. Available for purchase from ABC CANADA Literacy Foundation, Publication Fulfillment, 1450 Don Mills Road, Don Mills, ON M3b 2X7 or online at http://www.abc-canada.org/our_publications/ for a cost of \$10 plus \$5.00 shipping.

Folinsbee, Sue and Paul Jurmo. Collaborative Evaluation: A Handbook for Workplace Development Planners. 1994. Available for purchase from ABC CANADA Literacy Foundation, Publication Fulfillment, 1450 Don Mills Road, Don Mills, ON M3b 2X7 or online at http://www.abc-canada.org/our_publications/ for a cost of \$20 plus \$5.00 shipping.



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